

The Woodland Trust



The Woodland Trust chooses CARENG to grow its work

The Woodland Trust, the UK's leading woodland conservation charity, chooses CARENG CRM to manage its supporter relationships.

Client >

The Woodland Trust

Sector >

Not For Profit
Charity

Project >

Choosing CARENG

Commenting on the selection, the Trust's Director of Supporter Marketing, Helen Nott says, "Our decision to purchase CARENG was taken only after many months of careful consideration, during which we looked at thirteen possible contenders.

We are confident that Advanced NFP has the capability, resources and stability to be the Trust's long-term partner and to help us to manage the income which will be generated by building closer relationships with our supporters and members."

CARENG will also enable the Trust to integrate a large number of the Trust's own websites, which will increase efficiency by allowing members and supporters to 'self-serve' through its lively website, while a merchandising module will manage sales of gifts, including its unique woodland dedications. CARENG will directly receipt 43% of all the Trust's income which is around £27 million annually. Additionally CARENG is being used to drive about 83% of all the Trust's income via CRM activities.

Established in 1972, the Woodland Trust works to prevent further loss of ancient woodland; restore and improve the biodiversity of woods; expand the area of new native woodland; and increase understanding and enjoyment of woodland throughout the UK.

In 2009, the Trust welcomed its 200,000th member and is aiming to build a 300,000-strong membership by 2012. The Trust calculates that each new member enables it to protect another half acre of woodland.

A rigorous selection process

The Woodland Trust embarked on a comprehensive process to replace its ageing technology. Chris Webb, the Trust's Supporter Relationship Management (SRM) Project Manager, describes the problems that needed to be addressed, "The deficiencies of our legacy system required a number of convoluted work-arounds. In addition, our data was fragmented across a plethora of satellite systems and silos. In this situation, there is always a danger of

under or over-communicating with members and supporters. We were certainly not able to make an informed 'ask' based on a supporter's interests, giving history and giving preferences. Without a unified set of data and a single supporter view to pour over, you can't begin to explore the opportunities for targeting."

Chris cites a typical example, "We may wish to target Scottish supporters living in London who are primarily interested in supporting woodland projects in Scotland. That kind of targeting was extremely difficult with our old system."

Any system would have to work effectively across several sites and support around 180 users many of whom are home or field based.

Risk averse

The Trust's in-depth evaluation process included validating the business case for implementing a new system. Chris explains, "Among our objectives, we listed increasing the efficiency of our processes, reducing risk, improving the integration of data, and empowering our staff to do more without the intervention of the IT team."

At first, these objectives were not in any particular order of priority, but during the evaluation, risk reduction emerged uppermost, "The SRM system is an intrinsic part of leveraging money from our supporter base by managing communications. In fact, between 75% and 83% of all our income is generated by the management of contacts via our SRM system. Legacies make up 25% of our income and, again, the work to encourage legacy giving is driven through the SRM system.

Furthermore, we have no other way of receipting 18% of cash receipts other than by Direct Debit payments made via the system; in other words, we couldn't even bank this money without an SRM system." Chris underlines the serious implications, "We realised that a new implementation could be fraught with danger. Getting it wrong would have severe repercussions."



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"Why reinvent the wheel?"

The invitation to tender went out in May 2009. In the course of the following months, the field narrowed down to a two-horse race between CARENG and Microsoft Dynamics CRM.

The Woodland Trust was impressed by the ability of Advanced NFP to demonstrate to rigorously scripted scenarios. The team had prepared well and was able to show how CARENG could work with the Trust's own processes, such as membership renewals. Its superior functionality was clearly evident, as was the continuous investment it receives.

Chris says, "We considered large and small providers from the UK and US, resellers, cloud computing companies... in the end, we chose Advanced NFP out of all of them for demonstrable sector expertise and a track record of successful delivery."

Visits to a number of charities, where the Trust saw CARENG in action, had a bearing on the final decision. Some of the foremost names in the sector, Guide Dogs, Marie Curie Cancer Care and Care for the Family, were able to illustrate how extensively CARENG supports their work. The implementation for Guide Dogs won the IT Project Team of the Year award in the UK Industry Awards 2009.

This demonstrable track record contrasted with the shortfall in experience of other potential suppliers. Being able to draw on the experience of a strong user group was another plus in CARENG's favour.

The Woodland Trust also met with members of the Advanced NFP team and gained confidence in their ability to deliver and support the system to meet the charity's objectives, since proved further during the implementation. Chris says, "They instinctively understood where we were coming from and spoke our language."

Chris explains why the Trust decided not to commission a bespoke system, "One provider tried to convince us of the benefits by saying it would be our sole intellectual property.

But we just couldn't see any advantage: why reinvent the wheel and start designing from scratch, with unacceptable levels of risk, when we could use an existing tried and tested solution that incorporates the collective knowledge of major UK charities?"

Meeting the milestones

Having signed contracts in January, after some internal preparations, the implementation work began in earnest in March 2010. Advanced NFP team was actively involved in helping to map, review and streamline the organisation's business processes and requirements through a series of workshops. This laid a firm foundation for delivering a solution that would meet the charity's exact requirements. "The project team are a great bunch with high levels of expertise," comments Chris. "In the majority of cases, they've met it all before."

The project (codename 'Project Excalibur') went live on Valentine's Day 2011 and involved key groups of users cascading the training delivered by Advanced NFP down to their colleagues.

Simon Fowler, Managing Director, Advanced Business Solutions, comments: "We are delighted that CARENG will be supporting the important work of the Woodland Trust in protecting and creating woodland, and inspiring people to enjoy and value woods and trees. As the Trust has recognised, we continue to develop CARENG to meet the needs of our charity clients, helping them to build strong relationships and maximise every source of income. We look forward to supporting the long-term partnership to help the Trust maximise its return on investment.

More information

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