

The Woodland Trust



The Woodland Trust gains holistic view of supporters with Advanced NFP's CARENG CRM Solution

The charity campaigns to protect and save ancient woodland from destructive development and works closely with schools to promote woodlands.

Client >

The Woodland Trust

Sector >

Not For Profit
Charity

Project >

Maximise efficiency
within the Charity

The Client

The Woodland Trust is a conservation charity committed to the protection and sympathetic management of native woodland heritage. New CRM and fundraising solution from Advanced NFP Through its experience and authority in conservation, the Woodland Trust influences others who are in a position to improve the future of native woodland, be it government or other landowners and like-minded organisations.

Lack of unified data was leading to poor communication with members

The Woodland Trust needed a CRM system that would work effectively across several sites and support approximately 180 users, many of whom are home or field based. Its data was fragmented across a plethora of satellite systems and silos, which left the organisation in danger of under or over communicating with members and supporters.

Chris Webb, the Trust's Supporter Relationship Management (SRM) Project Manager, describes the issues they needed to address, "We weren't able to make an informed 'ask' based on a supporter's interests, giving history and preferences. Without access to a unified set of data and a single connected view of customers, you can't begin to explore the opportunities for effective targeting." "For 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."

The primary list of objectives included increasing the efficiency of processes, reducing risk, improving the integration of data, and empowering staff to do more without the intervention of the IT team.

Integrated data across every department delivering improved communications

The Woodland Trust chose Advanced NFP's CARENG CRM solution after considering a number of large and small providers from the UK and US. They visited charities where CARENG had already been implemented and were impressed with how extensively CARENG supported their work.

The functionality offered by CARENG, especially its ability to integrate data across every department in the organisation, was a key feature for the Woodland Trust. This gave them the ability to remove the silos and complicated workarounds that had previously been slowing down processes and hampering effective

communication. Through the information and demonstrations provided by Advanced NFP and having seen the solution in action within other charities, they were able to see exactly how CARENG could be used within the organisation and the benefits it would deliver.

The CARENG system was implemented across the whole of the trust in early 2011. There was an extensive training programme, which involved key groups of users cascading the training delivered by Advanced NFP down to their colleagues.

Two years on, the benefits

Today, CARENG is used across all departments and by the majority of the 330 staff employed by the Woodland Trust. The system integrates data on all its supporters across every department within the charity, from fund-raising and major donors, through to charitable trusts and direct marketing. CARENG is also used to manage the income generated by building closer relationships with supporters.

Connected, Integrated View of Supporters

Through the holistic view of all supporters provided by CARENG, the Woodland Trust has been able to segment its audience and create 'seven personas' of supporters. The depth of data means supporters can be split into these categories based on their history with the charity. For example, whether they have signed up for an e-newsletter but have yet to donate, have simply made one small donation or whether they are a major donor. This also applies to their preferences, if they're interested in woodlands in general or in a specific geography. This allows the charity to target their supporters more effectively than ever before, talking to them with a personalised approach and encouraging greater engagement. This has helped to generate income more effectively as a result.

The Woodland Trust is also using CARENG to develop cross marketing opportunities. These underpin revenue generation opportunities

between members, appeal respondents and, more recently, online campaigners.

Chris explains, "Our CRM strategy has given us the ability to develop insight such as personas, life time-value models and propensity modelling. We are using this to retain and develop our donor base across a multi-product offering, which includes raffle, appeals, dedication products, merchandise and legacy. Using CARENG has allowed us to break down silos and have a single supporter view. This has been fundamental to our revenue generation success."

Driving Down Administration Costs

The charity's day-to-day income is now driven through the CARENG system. The integration and automation provided by the system has allowed the charity to drive down administration costs, ensuring that more of each pound donated goes to the charity.

Chris commented, "As with most charities, we are constantly looking to reduce the percentage of money that goes to administration. Using the CARENG technology system helps to keep administration costs under control."

Innovative ideas to extend use of technology

Each of the departments within the organisation has a CARENG Super-User who is an expert in the system and who meets up regularly to discuss new ideas and innovative ways to use CARENG. The group recently decided that showcasing the system across the organisation would encourage more people to realise its full potential.

The Woodland Trust's CARENG Super-Users held 'CARE Lovin' Week' in order to drive increased use and benefits. The week involved dressing up as bears, a picnic complete with a bear cake and culminated in an award ceremony which recognised innovative uses of the system. Awards were given to the CARENG conqueror, the person who was able to demonstrate a proactive approach to learning and developing the system; the CARE cuddler, CARE's biggest fan; Creative CARE, the person who has taken an inventive or novel approach to using CARENG with positive results; and Crucial CARE, the team or individual who couldn't function without CARENG now, amongst others.

Advanced NFP attended 'CARE Lovin' Week', delivering presentations and training to

departments that were only using some of the core functions of the solution. They also targeted employees who had joined the Woodland Trust after CARENG launched. The week was a huge success, with many employees requesting further training from Super Users or finding new ways to use the system.

Chris explained, "The aim was to inspire new ideas and uncover new uses of the system. It worked. For example, someone who used the financial module didn't realise there was a sales ledger function and will now be using that to benefit the smooth running of financial processes internally."

In summary

Chris believes CARENG has already significantly improved efficiency within the Woodland Trust.

"We're a data driven organisation and Advanced NFP's CARENG solution is at the centre of our business, managing this for us. Every time a supporter 'touches' our organisation, that information is held on CARENG as our main and sole data repository. This means we know exactly how our supporters engage with us and what they are interested in. Whether it's giving money to local appeals or supporting the generic aims of the trust, CARENG helps us talk to our supporters in the way they want to be spoken to."

He concludes: "Ultimately, the Woodland Trust wants to be as efficient as possible so that every pound donated to the charity is put to the maximum effect. CARENG from Advanced NFP helps us drive down administration costs and be run as efficiently as possible. It's also been critical in supporting our revenue generation activities."

The Woodland Trust was the winner of the Advanced NFP's 2013 Customer Halo Award for Fundraising Team of the Year. The Customer Halo Awards are a new annual awards programme for customers which recognise best practice amongst organisations using its specialist fundraising and membership CRM solutions.

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More information

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