

SUCCESS STORY

COELIAC UK



TRANSFORMING THE MEMBER EXPERIENCE

How are Not for Profit organisations responding to changes in consumer behaviour, not least the desire to go online for everything from donating to volunteering? For Coeliac UK, a £250,000 overhaul of the ICT infrastructure has been underpinned by an investment in the Workbooks CRM solution, tightly integrated with the website.

In addition to creating new Membership models to support the diversity of people with coeliac disease, those following a gluten-free diet and their carers in the UK, the Charity is exploiting Workbooks to completely transform internal processes and improve the depth and timeliness of information available – from gluten-free products, to venues with gluten-free menus which can be accessed via a mobile App.

By improving the Membership experience, boosting fundraising and driving more focused sponsorship and advertising activity, Coeliac UK has a clear return on investment target and plans to exploit the in depth information now captured to continually enhance the quality of its Member experience.

PROVIDING GLUTEN-FREE SUPPORT

One in a hundred people have coeliac disease – a lifelong autoimmune disease caused by an intolerance to gluten – yet the vast majority have no idea they have it. For over 40 years, Coeliac UK has worked tirelessly to raise awareness of this disease amongst both the medical profession and general public and provide a number of support services to both people with the condition and those who care for them.

Over the last few years the Charity's Membership has changed; in addition to raised awareness resulting in better diagnosis rates, a growing number of people are making a lifestyle choice to adopt a gluten-free diet. This expanding Membership – and Member profile - has created new challenges for the Charity in meeting increasingly diverse requirements.

“**Data is critical to us. Knowing and understanding the profile of our 65,000 Members is really important to ensure we can continue to evolve the information, products and services they require.**”

Brendan Harris,
Director of ICT at Coeliac UK

PAST STATE

EXTENDING INFORMATION RESOURCES

The Charity's previous CRM system did not have the flexibility required to collect the diversity of new Member information. "We could not reconfigure the fields within the Membership system which, as a result, had not been changed in over seven years. This was stifling the growth of the organisation and constraining our ability to introduce new services," Harris explains.

As part of a £250,000 ICT overhaul, Coeliac UK turned instead to the Workbooks CRM – the only product that could deal with the scope of the Charity's work. In addition to 65,000 Members, the Charity has a database of 10,000 gluten-free

products from manufacturers across the world and manages a venue guide to eating establishments across the UK and beyond that are able to provide a good gluten-free experience, from hotels and restaurants to takeaways and home delivery organisations.

In addition, the CRM system had to be able to support the commercial operations of The Coeliac Trading Company which includes advertising, sponsorship and merchandise. Says Harris, "Workbooks CRM was the only system that had the depth of functionality required to manage this complex environment."

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PRESENT STATE

INTEGRATED ENVIRONMENT

Workbooks has delivered a fully integrated business platform, combining CRM and Membership Management into a single system. Working closely alongside Coeliac UK's website agency NetXtra, Workbooks has been fully integrated into the website, enabling members to sign up and pay online, purchase merchandise, submit recipes and access details of gluten-free foods together with venues selling suitable foods.

In total, the records of over 250,000 individuals, 15,000 organisations, 10,000 products and over

240,000 transactions were migrated across to Workbooks. Critically, while the old system required the Charity to employ dedicated SQL administrators to make any changes to the data fields, using Workbooks the whole system is far easier to manage, helping to drive cost reductions. In addition, the Software as a Service (SaaS) model has also enabled the society to reduce its internal IT estate.

In conjunction with the Workbooks CRM and website redevelopment, Coeliac UK has also upgraded Microsoft Office, including Outlook 2013 which can be built into Workbooks, and introduced VoIP, with 'click to call' enabled within Workbooks.

PRESENT STATE

BUSINESS TRANSFORMATION

Since implementation in October 2013, Coeliac UK has exploited Workbooks to completely overhaul and improve the vast majority of day to day processes. As Harris confirms, Workbooks is now the first system switched on every morning and the last one switched off each night; "It is being used all the time by Coeliac UK's staff, irrespective of role," he says.

Members are now able to submit information on the gluten-free dishes served at various venues via both the website and mobile App, which are automatically

uploaded into Workbooks. The information is then verified before being added to the venue directory. "Historically this entire process relied upon phone calls and manual processes. Now, not only can we provide a far quicker update on restaurant menus but the commercial team has faster access to new leads for advertising, promotion and sponsorship," says Harris.

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**Brendan Harris,
Director of ICT at Coeliac UK**

POSITIVE RESPONSE

The flexibility of the Workbooks CRM system has enabled Coeliac UK to introduce six different types of membership and provide differing Member types with a unique website experience. "Workbooks' controlled permissions are used to determine the information and services provided to each Member on the website," says Harris. "In addition, we are sending specific information and metrics about what the person does on the website into Workbooks so that we can get smarter about the differences between the demographics of our Membership."

For example, the Charity is tracking how many times a document has been downloaded; which main sections of the website the Member visited, and how often; and whether Members are opting to link the website to social networks – and which ones. This information is recorded on a Member by Member basis in real time to build a far deeper profile.

Members are gaining huge benefit from the range of online services now available – from tracking donations to checking Membership fees and viewing previous transactions from the Charity's shop. "It is far easier for Members to browse and search through the venue guide," says Harris, "and with the addition of the mobile App, Members are now able to quickly use location based services to locate the closest venue offering gluten-free food."

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CONCLUSION

Coeliac UK has a clear return on investment plan for the entire ICT overhaul, including website redevelopment and the adoption of Workbooks. As Harris explains, “The investment cost of the entire programme was, in many ways, part of the overhead required to deliver the effective operation of the Charity. Nevertheless, we have strong targets for increasing Membership, volunteering, donations, advertising and commercial activity which will deliver the ROI.”

Within six months, 25,000 of the Charity’s 65,000 Members have activated the new online service, clearly demonstrating Member demand for an excellent online experience. Indeed, Harris believes Coeliac UK’s new model reflects the way every Not for Profit organisation should now operate: “It is about keeping costs and overheads down whilst embracing the change in people’s behaviour and the shift to online interaction for everything from fundraising to volunteering.”

Harris concludes, “Coeliac UK has not even scratched the surface of where we can go with Workbooks; the deep insight we are attaining regarding Member behaviour will inform future strategy and business operations.”

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Brendan Harris,
Director of ICT at Coeliac UK

A Practical Guide to CRM and Membership Management for NFPs

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