

Success Story

WORKBOOKS HAS SIGNIFICANTLY INCREASED EFFICIENCY: COELIAC UK

Coeliac UK can get through a considerable amount of work with a fairly small team and deliver an outstanding experience for their members.



“WORKBOOKS WAS THE ONLY SOLUTION THAT COULD HANDLE THE COMPLEXITY OF MANAGING RELATIONSHIPS WITH MEMBERS, CUSTOMERS AND SUPPLIERS - WHILE PRESENTING A SIMPLE, LOGICAL INTERFACE TO THE USERS IN EACH TEAM, WITH CLEAR REPORTING.”

Brendan Harris - Director of ICT at Coeliac UK

INTRO

Coeliac UK is the charity for people who need to live without gluten. It is a membership organisation established in 1968 that was originally set up to provide information and support to people diagnosed with coeliac disease. The charity also supports others living gluten-free, providing independent, trustworthy advice and support and campaigning for better gluten-free food in more places. They also fund crucial research to manage the impact of gluten and find answers to coeliac disease so that one day, no one's life will be limited by gluten.

Coeliac UK decided to open up its membership to all people following a gluten-free diet for reasons other than coeliac disease, and now this group makes up 10% of its members.

This was a major strategic shift for the organisation and it necessitated a transformation of its business processes.

Underpinning that transformation was a £250,000 ICT overhaul in 2013, that included the implementation of Workbooks CRM and a brand new website. This far-reaching, ever-evolving and highly sophisticated implementation of Workbooks allows the organisation to better segment its member records, record information in a more agile way and adapt to market changes. It has been the foundation of the continued success of Coeliac UK.



MEMBERSHIP & FUNDRAISING MANAGEMENT



AUTOMATED AND STREAMLINED PROCESSES



ADVANCED REPORTING FOR BETTER DECISION MAKING

CHANGING MEMBER PROFILE

One in a hundred people has coeliac disease – a lifelong autoimmune disease caused by an intolerance to gluten – yet the vast majority have no idea they have it. For nearly 50 years, Coeliac UK has worked tirelessly to raise awareness of this disease amongst both the medical profession, media and general public, and to provide a number of support services to people with the condition and their carers.

Back in 2013 the charity was using a membership / CRM system that lacked the flexibility required to store information on its rapidly evolving membership. Brendan Harris, Director of ICT at Coeliac UK says: “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 was constraining our ability to introduce new services.”

At the same time, the charity was keen to allow online and mobile access to its database of 10,000+ gluten-free certified products from manufacturers across the world, and its venue guide to eating establishments across the UK and beyond that provide a good gluten-free experience. Finally, the CRM system needed to support the commercial operations of The Coeliac Trading Company which includes advertising, sponsorship, training, accreditation and merchandise.

UPGRADING CRM

So, as part of their ICT overhaul, Harris and his team reviewed 26 CRM systems, and after inviting ten to tender for the project, they selected Workbooks based on a number of criteria. “Firstly, we needed a system that we could customise and develop ourselves to suit our specific needs,” says Harris. “Not all solutions allowed that.”

“NOT ALL SOLUTIONS WERE AS EASY TO USE AS WORKBOOKS, SO WE RAN TESTS ACROSS DIFFERENT DEPARTMENTS AND IT BECAME CLEAR THAT WORKBOOKS WAS THE ONE THAT OUR PEOPLE ACTUALLY PREFERRED”

Brendan Harris - Director of ICT at Coeliac UK

Harris recognised that good user adoption is key to success, and was keen to reduce the cost of ownership by becoming self-sufficient.

He continues: “Our solution needed to be flexible and rich in features. In particular we needed to be able to report, filter and so on in a number of different ways. We wanted to be able to use the same tool for both reporting and analysing the data to gain insight.”

Coeliac UK liked the fact that Workbooks is UK-based, so its data would sit in the UK. And, finally, the price was right. Taking into account the cost of implementation, on-going evolution and user licences, the Workbooks solution would deliver a clear return on investment.

INITIAL IMPLEMENTATION

Workbooks delivered a fully integrated business platform, combining CRM, membership management, business workflows and transaction processing on a single system. Working closely alongside Coeliac UK’s website agency NetXtra, Workbooks was 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 offering gluten-free options.

In total, the records of over 250,000 individuals, 15,000 organisations, 10,000 products and over 240,000 transactions were migrated 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 cloud-based Software as a Service model enabled the charity to reduce its internal IT estate and the overhead of managing and upgrading servers and server software.

In conjunction with the Workbooks CRM and website redevelopment, Coeliac UK also upgraded its business systems and has enabled Microsoft Outlook to sync with Workbooks.

AN EVOLVING IMPLEMENTATION

Today, virtually everyone in the business, from the chief executive to the membership manager, uses Workbooks every day.

“WORKBOOKS IS THE FIRST SYSTEM SWITCHED ON EVERY MORNING AND THE LAST ONE SWITCHED OFF EACH NIGHT. IT IS USED ALL THE TIME BY COELIAC UK’S STAFF, IRRESPECTIVE OF ROLE.”

Brendan Harris - Director of ICT at Coeliac UK

The Commercial team has licensed c.3,000 food products (Crossed Grain symbol) and accredited over 3,000 catering venues as Gluten-Free (GF accreditation), all of which are listed on the Coeliac UK website. The Charity receives support from these companies in the form of advertising, sponsorship, licensing (Crossed Grain symbol), catering GF accreditation/training, thereby helping them to promote their gluten-free ranges to the 65,000 members.

The Fundraising team: “We use Workbooks to log donors and potential donors,” explains Harris. “We know which fundraising activities led to which donations, whether it is a challenge event or any of the many other activities organised by our local groups to raise funds and boost our profile. This allows us to focus future efforts on the methods we know will be most successful. Workbooks also helps us track how donations were made and whether or not they qualify for Gift Aid, so we can accurately submit returns to HMRC.”

The Membership team: With 65,000 members, this a major focus for the organisation. Members can sign-up online, pay for membership and renew; they can view previous purchases and donations and access relevant information based on their membership type. Armed with fuller and clearer information on its members, Coeliac UK was able to introduce different types of membership, providing each with a tailored and more relevant 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 tracks and records how many times a document has been downloaded and which part of the website a member visits.”

The Volunteering team: More than 500 active volunteers run 76 local groups across the country. They organise local activities and support their local community; they also support the charity’s work around campaigning to lobby for awareness and understanding of gluten-free choices. Local groups each have their own microsite, managed through Workbooks, where they have local pages offering information on local activities and events.

The Campaign team: Coeliac UK’s Campaign team uses Workbooks to maintain a database of politicians, NHS Trusts, government departments, professional standard authorities, and so on that it actively lobbies, and tracks all its interactions on Workbooks. Workbooks is being used to track the lobbying of Clinical Commissioning Groups consulting on the future of gluten-free prescribing and other policies. Another campaign allows researchers to submit their funding applications online, and the documents are stored in Workbooks where a review process helps the organisation to decide how to allocate funds.

The Marketing Communications team: “Every week we send communications to one group or another,” says Harris. “We send a newsletter to our 65,000 members every month, then there are bulk renewals, invitations to events, product recalls and much more. These go out via eight different MailChimp accounts, as well as through mobile apps. It’s a complex and large-scale set-up, which would not work without Workbooks’ campaign management functionality underpinning it all.”

The Finance team: The finance team uses details of every financial transaction recorded in Workbooks to reconcile information from the organisation’s bank accounts with the Access Dimensions finance software. Using Workbooks every day, the finance team is then able to analyse changes to Direct Debits, Gift Aid donations and so on, and take appropriate actions.

“A small IT team supports and facilitates the usage of Workbooks across the Coeliac UK organisation,” explains Harris. “They help with importing and exporting data, ensure that data flows and processes are running smoothly and that information is being fed into Workbooks consistently. Beyond this, the IT team is a great source of innovation, always looking for ways to improve the business, make life easier for users, improve productivity and enhance the overall experience for our members. With less time wasted on server maintenance, the IT team has been freed up to make a more proactive contribution to the business.”

DELIVERING BENEFITS

One of the challenges at Coeliac UK was to combine different aspects of the organisation on a single platform to manage relationships with members, customers and suppliers, and Harris is clear that Workbooks was the only solution that could handle this complexity while presenting a simple, logical interface to the users in each team, with clear reporting. The database handles over a quarter of a million contacts with 270 fields on a person record, 300 fields on an activity record and 15 types of person view, and more than 100,000 transactions per year.

He adds: "Workbooks has made us far more efficient in what we do. It ensures we keep our data super clean - a single point of truth that we know is absolutely accurate - and this allows us to get through a considerable amount of work with a fairly small team and to deliver an outstanding, self-service experience for our members. Workbooks allows Coeliac UK to punch far above its weight."

LOOKING AHEAD

As the organisation continues to grow and as the trend towards gluten-free living gathers ever greater momentum, the charity's use of Workbooks is expanding. Coeliac UK is continuing to improve member retention and streamline processes by converting members to direct debit payments, making increasing use of member surveys - with the results stored and analysed in Workbooks; and in coming months we can expect to see even greater integration with social media.

The Coeliac UK website has been so successful at raising the profile of the gluten-free diet that it now faces competition from bloggers and food manufacturers who want to provide their own gluten-free information. The charity is exploring the introduction of global standards and accreditations, and is investing in the visual look and feel, the language, imagery and the user experience of its website.

Introducing Workbooks and evolving the solution over the past four years has allowed Coeliac UK to completely overhaul and improve the vast majority of its day-to-day processes and offer a significantly better experience to its members. Inspired by this experience, the charity is energised about the challenges and opportunities that lie ahead, and expects Workbooks to remain central to its operation as it moves towards that future.

About

INDUSTRY

Charity, NFP

NUMBER OF EMPLOYEES

51-100

IMPLEMENTATION DATE

Nov 2011

TECHNOLOGY

- Workbooks Business
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- Outlook Connector

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