



Gaining targeted communications, 24/7 functionality and increased opportunities while managing the risks.

For over 50 years, Hansel has been an innovative social care provider. Based in the West of Scotland, they offer a range of services to adults with learning disabilities and additional support needs. Hansel continues to grow and evolve with the active participation of the people they work for and in partnership with others who share a commitment to providing the best services possible.

Recently, Agnes Paton, Hansel's Fundraising and Communications Manager, spoke to us about their experience in adopting and implementing Cloud Engage, the CRM fundraising platform from Advanced.

Reaching your audience

Hansel Foundation is a regionally focused charitable organisation and the vast majority of our stakeholders are located within a radius of 20 to 30 miles from us. The funds we receive are allocated to further develop our services and until recently, this meant working without a proper CRM system. We were using multiple pages on a single spreadsheet to hold all of our contact and consent details along with other spreadsheets for events and fundraising data. We knew this way of working was limiting our opportunities and increasing the risk of data non-compliance.

All of our contact data was contained within that spreadsheet and we would simply add to it. This made us very concerned because the document was becoming too large to manage efficiently

and we lived in dread of the file being corrupted. Working in this manner made it almost impossible to analyse our data properly or to take an effective communications approach with different segments of our audience.

Clear Communication Channels

The weakness of our system was demonstrated to us under the very difficult circumstances surrounding the outbreak of the Coronavirus. Our first priority is always the care of those who access our services, many of whom have health issues that make them vulnerable. We would have liked to have had more regular contact with our supporters to tell them about the exceptional work our team were doing to adapt our services during the pandemic but we simply didn't have the tools in place to do this quickly and remotely from our office base.

Although we are currently still in the implementation and training phase with Cloud Engage, we can already see the benefits that automated data segmentation and analysis will deliver. Once we are up and running it will be so much easier for us to send the right message, to the right person, at the right time.

Searching for a solution

At the beginning of this journey we did a lot of research on CRM providers. We read a number of fundraising reports and numerous articles about how to choose the right CRM. The process included hours of online searches and we



Client >

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Cloud Engage

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Agnes Paton > Fundraising and Communications Manager > Hansel

Hansel Care trust Advanced's Cloud CRM Platform

noticed that Cloud Engage kept appearing. Eventually, this led to us being contacted by an Advanced account manager who asked if there was something he could do to help.

We were not ready to commit at this stage but we did ask a lot of questions. We were very encouraged by the fact that we were not pressured and that Advanced took the time to really understand our situation and what we required. Everyone I spoke to, from sales through to the implementation team, was friendly, approachable and knowledgeable. It was actually like talking to people I already knew. They didn't push, they addressed Hansel's individual concerns and never made me feel like I was out of my depth.

Increased Opportunities

The main functionality we required was an efficient way to manage our stakeholder data. We wanted to understand the behaviours and motivations of those who support us and to use that information to make our communications more relevant, while remaining GDPR compliant. We also needed to take a one-stop-shop approach to our fundraising and to be able to reliably forecast, and report on, all activities.

Pre Covid, we relied on our events to support us financially. We hosted days at the races, golf days and ladies lunches along with annual balls, Christmas events and art shows. Although we will be moving away from being reliant on events, the Cloud Engage portal will provide us with a flexible solution that will allow us to more easily manage our future events calendar, give us access to a wider audience and provide more fundraising opportunities. It also provides a much better experience for our supporters.

Accessing the portal from our website, supporters will be able to quickly find our list of upcoming events 24/7. They can easily book, and pay for, those they wish to attend or make an online donation any time they want to. Not only will this help us boost funds, it will also take a lot of pressure off Hansel's staff. We'll no longer have to worry about missed phone calls or cheques that never arrive in the post.

Delivering on time

When scheduling the implementation of Cloud Engage back in 2019, we worked around our fundraising calendar which launches in April and May. We made the decision to go ahead with this project in late November and had a complete plan for implementation and training in place by December. Little did we know what was ahead of us come March 2020 with the project being paused due to COVID. We've been working with an Advanced project manager and 2 training consultants who have all been fantastic. Everyone understands what they need to do and just get on with it.

From our location in Ayrshire, we've managed to use technology to do everything remotely, including when we've been working from home during the pandemic. This has been no problem at all. Using Cloud Share and Teams, Advanced have put the system in place and are now holding training sessions. Nothing has been missed or cancelled and we also feel we are doing our small part in reducing our carbon footprint. Our experience has been that Advanced is providing a great service at a very reasonable cost.

From that first phone call, all Hansel staff have found the entire process to be very positive. Everyone is now very keen to get started and I am looking forward to carrying this strong relationship into the future.

Agnes says, "In the past, I've not heard many people talking about Advanced or Cloud Engage and I don't really understand why this is the case. Speaking as a regionally focused charity, from the experience we've had, I would definitely recommend them to other organisations like us."

More information

w [oneadvanced.com](https://www.oneadvanced.com)
t +44(0) 8451 605 555
e hello@oneadvanced.com

Ditton Park, Riding Court Road, Datchet, SL3 9LL

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