

CUSTOMER SUCCESS



SageCRM.com—Helping Create Lifetime Relationships at Big Brothers Big Sisters

The Big Brothers Big Sisters organization is one of the nation's most respected charities. The Greater Rochester affiliate helps children in eight counties find a nurturing mentor and reach their potential through one-to-one, professionally supported relationships. SageCRM.com is the tool the organization uses to support this mission.

It's All About Relationships

In 2004, the organization's growth showed signs of slowing. Donations were flat and volunteerism was down. Jeffrey Newland joined Big Brothers Big Sisters about that time as the new executive director. He spent most of the first year studying the organization's business model and looking for avenues of improvement. What the organization obviously lacked was a cohesive method of tracking individuals involved with the charity. Newland believed that the organization's fractured data often led to fractured relationships. "What came through loud and clear is that our greatest successes come from the relationships we develop. Increasing donor satisfaction and creating donors for life had to be our priority."

So, the answer was a strong, cohesive customer relationship management (CRM) solution that would allow Big Brothers Big Sisters to nurture and develop those relationships.

SageCRM.com Fits Right In

Newland began by looking only at solutions targeting the nonprofit sector, but couldn't find a suitable solution. After widening his selection criteria to include CRM products generally considered for commercial enterprises, one captured Newland's attention—SageCRM.com. Watching an online demo started the wheels turning, "We have customers: those we serve, and those who donate their time and money. We have products: opportunities and events to donate that time and money." SageCRM.com would be the perfect fit for Big Brothers Big Sisters.

With employees scattered throughout the Greater Rochester area, the ability to access the software using the Internet is crucial. In addition, the cost structure of SageCRM.com is attractive to the organization. With a fixed monthly cost, budgeting is simplified. Additionally, a hosted system, such as SageCRM.com, eliminates the IT overhead and expense required to maintain, support, secure, and upgrade a locally installed system. "With SageCRM.com, we started out \$5,000 ahead of any other system, and keep saving each month," says Newland.

Customer:

Big Brothers Big Sisters of Greater Rochester

Industry:

Nonprofit Organization

Location:

Rochester, New York

Number of Locations:

One

Number of Employees:

15+

System:

SageCRM.com

CHALLENGE

With more than a dozen fragmented lists of donors, volunteers, and clients, it was difficult to nurture the relationships that are the foundation of the organization's success.

SOLUTION

SageCRM.com provides a single location to store and access information about both the donors and individuals that Big Brothers Big Sisters serves.

RESULTS

CRM Database provided a single cohesive picture of the organization's activities. Donor satisfaction and outreach opportunities increased. No initial investment and low monthly fees proved easy on the budget.

Cohesive Database

Once Big Brothers Big Sisters imported its data into SageCRM.com, the staff was surprised that it had more than 6,000 names. For the first time the organization had all donors, volunteers, clients, and opportunities in one easy-to-access location.

Big Brothers Big Sisters uses the SageCRM.com Customer Service module to track its matches between adult and child. “Companies probably use it to track a customer complaint, but we use it to track who’s a big, who’s a little, who’s the parent, what’s the school, and what the outcomes are. It’s ideal!” Information once stored in disparate databases or even on handwritten lists is now quickly and easily available to staff members.

“It completely brought our two worlds of fundraising and service delivery together. We have one place where we can see all of our constituents and the opportunities associated with them—plus all the details of our match relationships,” explains Newland.

Creating Relationships For Life

One capability of SageCRM.com that Newland is most excited about is the ability to show donors the overall impact they’ve had on the organization. By assigning an “Outreach Code” to each volunteer or donor, Big Brothers Big Sisters can track not only the monetary contributions that an individual has made, but can also associate other contributors and volunteers that this individual has introduced to the organization. “We’re able to track the legacy of each of our constituents and literally show them how many matches and how much money resulted from their involvement,” explains Newland. “This is a crucial part of building donors for life. The satisfaction an individual gets by seeing the overall impact they have is immeasurable.”

Empowering Staff

Newland says that SageCRM.com empowers his relatively small staff to reach a large number of constituents. By setting up automated reminders, the staff is prompted to initiate new communication and be proactive in their follow up. Every activity is tracked and the results are captured.

“I sometimes forget SageCRM.com wasn’t built just for me!”

The organization is now setting bigger goals, and the entire staff has a confidence that they can reach those goals. “SageCRM.com has been a unifying factor for this organization. Not only has it produced measurable results, it also boosts the morale and satisfaction of our staff. They are able to do their jobs better and make a difference. It was like pulling out the hamster on the treadmill and putting in a HEMI®!”

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

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