

Case Study

Kidney Care UK have created an 'intelligent database' with Harlequin CRM

Kidney Care UK needed to replace an aging database with charity software that would unify disparate information, inform decision making and underpin future plans. Once they had made the decision to swap systems, it was much easier than they expected.

They now have a single view of their contacts and manage fundraising and grant giving with the software. Their growing team is starting to maximise the benefits of Harlequin CRM and they see the database as central to their strategic expansion.

About the charity:

Kidney Care UK is the UK's leading kidney patient support charity, providing practical, financial and emotional support for kidney patients and their families throughout the UK.

They provide support for more than 100 patients every week and invest over £3million every year in patient grants; helping people with kidney disease take much needed respite breaks, purchase domestic goods like washing machines or carpets or cover education and training costs to help them return to work.

They believe that no-one should face kidney disease alone.

Find out more at:
www.kidneycareuk.org or call 01420 541424. Phone lines are open 9am until 5pm, Monday to Friday. Calls from UK landlines are charged at local rates, and charges from mobiles vary.

Charity information:

www.kidneycareuk.org
[@kidneycareuk](mailto:enquiries@kidneycareuk)
Charity number: 270288

Jan Saunders, Data Manager at Kidney Care UK shares their journey so far.

Why did you select Harlequin?

We looked at other database companies taking into consideration cost, whether the supplier could meet our needs and what level of support we would be offered. We felt that Harlequin not only ticked all three boxes but had the edge on other databases in terms of being personable, sensitive and flexible.

What were your business drivers for investing in a new system?

Our old system was very out of date. Its functionality was really basic and any effective interrogation of the data was impossible. Our contacts were divided into three separate databases resulting in duplication, inconsistency and irregularities and we wanted to bring them all into the same system.

What process did you follow in selecting a new system?

Having made some initial enquiries, we invited suppliers to visit and present to us. Our entire team came to the meetings as we needed everyone to be on board; see it from all angles; and have the chance to ask questions (at this stage we were



a very small team consisting of less than 10 people but our ambition was to grow in order that we could better support kidney patients and the wider community).

As our charity is a grant-giving charity we needed a package that would satisfy all of our interests including fundraising, patient grants and our hospital grants process. It was important that it was compatible from an accounting aspect too.

In order to gain our confidence, the database required ease of use, robustness, opportunities to expand and access to support whenever required.

How do you use Harlequin?

Mainly we use Harlequin to record our patient grants and fundraising activity so that we can carry out analysis, create reports, monitor and communicate with our contacts effectively and coherently.

As we have grown as a charity, we are starting to utilise additional modules such as merchandising and events.

“ The support team are helpful, friendly and always on hand. ”

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What are the biggest benefits of Harlequin?

Single view of information:

We now have an intelligent database that provides a single view of our stakeholders and provides the ability to gain information and insight to inform our plans.

Informed decision-making:

We are able to reflect and review what and how we do things as well as consider our steps for the future. This greatly assists us with our decision-making.

How was the system roll out?

Once we made the decision to swap systems, it was much easier than we expected and reassuring that any support needed was just a phone call away.

Did you have any challenges?

Like all new systems, it takes a little longer to do things at the start.

What advice do you have for other charities implementing a new system?

Think very carefully about what you want to be able to achieve now and future proof as far as possible.

Ensure the new system complements your business and the people who use it. It is critically important to document your requirements BEFORE starting the build phase.

Finally, it is crucial that you can grab help whenever you need it from a real person, not just a reference book.

Tip: Create recipe-card like instructions that can be referred back to and provide the basis for reviewing your methods of working.



“ Harlequin had the edge on other database suppliers in terms of being personable, sensitive and flexible. ”

Have you any examples of best practice in using the system?

We have created a catalogue of step-by-step processes to ensure consistency and standardisation throughout the charity.

These recipe-card like instructions can be referred back to and also provide the basis for reviewing our methods of working.

They also mean that as the charity grows we can ensure we are all on the same page and following the same protocols.

What is your experience of customer care from Harlequin?

The support team are excellent; they are helpful, friendly and always on hand.

Tip: Think very carefully about what you want to be able to achieve now and future proof as far as possible.

What are your plans for the future in relation to the system?

We only took the system on board in 2016 so we are still finding our way.

We are in the process of developing our charity in terms of growing the team, extending our scope to help more patients and increasing our supporter base.

However, we recognise how important it is to do both responsibly and carefully in order to gain optimum success.

Our database is at the heart of this continuing journey and key to our development.

What three words best describe Harlequin?

*Personal.
Reliable.
Resourceful.*