

■ Case Study

CRM, Fundraising &
Service Delivery



SpecialEffect has consolidated service delivery and fundraising data into one easily accessible system - to see full information picture.

Barry Floyd, Operations Co-ordinator at SpecialEffect, has worked in the third sector for 25 years and has extensive insight into the technology on offer. He shares why Harlequin has impressed him so much in the two years since they went live and what benefits the charity is experiencing.



About the charity:

SpecialEffect puts the fun and inclusion back into the lives of people with physical disabilities by helping them to play video games. By using technology ranging from modified joypads to eye-control, the charity finds a way for people to play to the very best of their abilities.

But SpecialEffect does not do this just for fun. By levelling the playing field, the charity is bringing families and friends together and having a profoundly positive impact on therapy, confidence and rehabilitation.

Charity information:

www.specialeffect.org.uk
@SpecialEffect
Charity number: 1121004



What were your business drivers for investing in Harlequin CRM?

The installation of Harlequin CRM was a final part of an infrastructure upgrade and a progression from the charity using Google Docs. We had a set plan to consolidate our data from the service delivery and fundraising teams. This would enable us to see the full picture - of the people we help and those who support us. We needed a system that could deliver this at a price we could justify.

What process did you follow in selecting a new system?

I have experience at global charities and am familiar with the 'big brand' names in charity software. At SpecialEffect, I needed to ensure we got the best quality, best suited package at the most attainable price.

We looked at a range of databases and created a shortlist of three. Harlequin proved to be the brilliant curveball in the process and really changed my thinking on which we might go with.

Tip: Get the data mapping right from the outset if you are migrating data across.

Why did you choose Harlequin?

From day one, there was a real match of ethos between our organisations. Similar to us, there is a family-run element to Harlequin and they have real pride in their software and passion for what they do. Tom and Dom delivered a strong demo and convinced us they could cater to our needs at the most cost-effective price.

How was go-live?

Previously, I have been involved with go-lives that have gone well and others that have been challenging. With Harlequin, the roll-out was as smooth as it could possibly be. The data in Google Docs presented us with a puzzle to work through with the Harlequin team; we mapped the data together and cracked it all quickly.

Who uses the software?

12 members of staff use Harlequin. We have created different access rights to the data across the service delivery and fundraising teams.

“ We have easy access to full donor histories across the team. ”

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How do you use Harlequin?

It is used across the charity and assists our fundraising and service delivery teams. We capture contact details and have at-a-glance visibility of all communications with everyone we have a relationship with.

Our occupational therapists and technology advisers use the system to run the equipment loan library and StarGaze project. Sensitive medical information is restricted to these service delivery professionals.

The fundraisers use Harlequin to track all income and nurture UK based individual givers and major donors. They also manage trust, foundation and grant applications.

Harlequin is proving especially useful in building our international network of corporate supporters. One Special Day is an amazing annual event where many gaming companies donate the day's profits to us. We record critical information and use the relationship functionality to stay connected to key supporters as they move roles and organisations.

What are the key benefits?

- **Increased confidence in our data security and processing.** Plus the new Consent feature is helping us to address GDPR.
- **More effective fundraising.** We have easy access to full donor histories across the team.
- **More streamlined service delivery.** We can approve work with confidence with ready-access to detailed information.

Tip: Ensure to undertake regular quality control checks and encourage consistent data entry.



Have you had any challenges?

Ensuring everyone is using the system consistently is a hurdle for any organisation embracing CRM. This is a relatively new road for us so we are still embedding the framework. This comes with a bit of badgering and policing of data entry.

What is your view of customer service at Harlequin?

We are well settled into the system now so we don't tend to contact the support team very often. In the early days when we needed more help they were fantastic. The system is very robust and things don't go wrong.

Overall, I know that Harlequin understand how much we care about our business. And delivering excellent customer service is at the core of Harlequin's business.

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

We will be developing individual giving, particularly keeping track of regular gifts. We will add new options such as lottery and payroll giving.

“ The roll-out was as smooth as it could possibly be. Delivering good customer service is at the core of Harlequin's business. ”

What advice would you give to a charity implementing a new CRM system?

As we did, put in the groundwork beforehand; get the data mapping right from the outset if you are migrating data across.

Moving forward, make one person responsible for the database overall. Very quickly data can vary in quality, which will dilute the value of your information. Ensure to undertake regular quality control checks and encourage consistency.

What three words best describe Harlequin?

User-friendly, responsive, thorough.