

## Tiggywinkles replaces eight databases with Harlequin CRM for integrated animal and supporter management

Tiggywinkles deals with high volumes of animals, supporters and visitors but was struggling with disparate databases and stand-alone processes. With Harlequin CRM it now has a streamlined, single solution for its front-line service and back-end office. It has a complete view of information and relationships, and plans to lever the success of its membership and gift adoption schemes – and deliver CRM and website integration in the future.

### About the charity:

Tiggywinkles, The Wildlife Hospital Trust is the world's leading wildlife hospital. It specialises in the rescue and treatment of wild animals and since its inception in 1978 has treated over 200,000 patients. It is based at Haddenham in Buckinghamshire where it operates an animal hospital and visitor centre, and teaches wild animal practice to aspiring veterinary surgeons nurses and carers.

All UK wild animals are treated free of charge to the public. The charity receives no state funding and relies on public support and membership income.

### Size of charity:

In 2014, the charity's expenditure was £1.3 million, caring for over 1100 wild patients at any given time. There are 37 members of staff, supported by 50 volunteers.

### Charity information:

[www.sttiggywinkles.org.uk](http://www.sttiggywinkles.org.uk)  
The Wildlife Hospital Trust  
Registered Charity number 286447



Tim Moran, Operations Manager at Tiggywinkles shares how the charity has revolutionised its approach to information and re-engineered its processes for animal and supporter management.

### Why did you need a new system?

*We look after around 10,000 animal casualties each year; that's up to 70 casualties each day. How we accessed information was becoming far too complex; we could not easily see what supporters and rescuers were doing for us or tie them to the animal they had brought in.*

*We were running eight different Access databases for casualties, gift adoptions, memberships, collection pots and general donors – rescuers were being logged as animals in the old front-of-house system as we only had one record type.*

### What did you want to achieve?

*The overall vision is of a central CRM system that seamlessly integrates with our website so that supporters and members can self-register information and access special online features. Initially we aimed to implement a new CRM system and deliver a new website at the same time.*

*The main aim of the CRM project was to unify all information and streamline processes for our service delivery, finance, fundraising and membership functions – and to essentially allow for the management of animals and rescuers in one relational data structure.*



### Who uses the system?

*Up to 15 people use the system on a daily basis - from the front-of-house crew and accounts team who work normal office hours, to the nursing team who operate on a 24-hour rota.*

### Why did you choose Harlequin?

*We initially met Harlequin at a sector event where we had an introductory demo. The system seemed to work really well and was competitively priced. In future meetings, they proved it could accommodate all our requirements – including bringing in animal management. It has a similar look and feel to Microsoft software and so users would feel comfortable.*

### How do you use Harlequin CRM?

*The entire charity has access to the system – it is used on the front-line and all the way through to the backend accounting team, underpinning consistent process journeys for animals and supporters.*

### Animal casualties:

*Our front-line team enter each casualty on the system, track its treatment plan and create a linked contact record for the person who brought it in.*

### Fundraising:

*Supporter relationships are being strengthened with the system; when Mr Smith calls up to ask "how is my hedgehog?" we now have a complete picture of our relationship with him and how he supports us.*

Continued

# ■ Case Study

CRM, Service Delivery,  
Fundraising and Membership



*We manage our gift adoptions by allocating an animal type and payment schedule, and co-ordinate via bulk pack mailings. We also make good use of the collection tin tool within the software.*

## **Accounting:**

*All gifts are logged on the system to be thanked and banked. Gift Aid is processed on relevant donations including those from our visitor centre; we scan Gift Aid declarations and store each against the contact record. Uploading our Gift Aid schedules to the new Inland Revenue website is very straightforward.*

*Converting many of our standing orders into direct debts on the system has also saved us hours of time in monthly administration – it is much simpler.*

## **Membership:**

*Members are logged on the system with renewal information, alerts and standard letters – monthly renewals are issued in batches.*

## **Communications:**

*The category types we have set-up will ensure we send information to the right people at the right time. People can opt-in for our newsletter and determine how often they want to hear from us.*

## **Can you summarise the key benefits the system has brought to Tiggywinkles?**

- *Saved time and money for the charity.*
- *Centralised data and streamlined processes across the entire organisation.*
- *A more joined up service for animals, rescuers and supporters.*
- *A smoother front-of-house process for staff and volunteers.*
- *Robust back-end processes.*
- *Adherence to best practice in donor care, Gift Aid and communications management.*
- *Potential to increase donations, members and gift adoptions and interact more with our 60,000 centre visitors.*



“ When Mr Smith calls up to ask “how is my hedgehog?” we now have a complete picture of our relationship with him and how he supports us. ”

## **Do you have an example of best practice to share?**

*People use the system 24 hours a day, 365 days a year. During office hours we regularly check that data imputed into the system is in a correct, consistent format and update it as needed – such as name capitalisation. To help volunteers enter data as quickly and easily as possible, we have added an address lookup tool.*

## **What are your plans for the future?**

*With more efficient processes, we hope to increase our donation income and the renewal rate of our member and gift adoption schemes.*

*Our next phase is to integrate Harlequin CRM with our new website so members can self-service their information, which will update the back-end database.*

**Tip:** For a website and CRM integration project, deliver the separate entities first and then deliver the integration.

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

*Allow enough time early in your CRM project to tidy your data ready for the import – such as checking the consistency and accuracy of data under each column heading.*

*Don't try to tackle everything in the first phase. For a website and CRM integration project, deliver the separate entities first and then deliver the integration.*

## **What is your experience of customer service at Harlequin?**

*Customer service is fantastic – we've never had a problem at all. They are always there to help.*

## **What three words best describe Harlequin?**

*Reliable, user-friendly and adaptable.*

**Tip:** Allow enough time early in your CRM project to tidy your data ready for the import.