HAMPSHIRE AND ISLE OF WIGHT AIR AMBULANCE 2019

a donorflex client case study

Conversation with Peter Cox, CRM Team Leader (August, 2019)

What is HIOWAA's mission and what were your objectives for the new CRM system?

We are Hampshire Isle of Wight Air Ambulance. Our mission is to provide critical care to those that need it.

We provide a service seven days a week, 365 days a year.

The objective is to provide equipment and expertise to people that need that you would normally find in an Accident & Emergency Department in a hospital.

It costs us £15,000 a day to fund this service. That money comes purely from the generosity of the people of the local community.

We have a helicopter and we also have some what we call CCTVs, which are Critical Care Team vehicles that are able to provide the same level of expertise and equipment you would get in a helicopter in a more urban are where perhaps it's more difficult for the helicopter to find somewhere to land.

What were your needs when you decided to replace your previous CRM system?

Our previous CRM system we had had for nine years. It had grown along with the charity. We had reached the point where it couldn't deal with the amount of data we were having or the amount of users that we were having.

So, what we wanted, what we were looking for was a system that would grow with us. That would handle all of the needs we had. Particularly around issues such as Gift Aid, which is why we then came to the decision that donorflex was the route we wanted to go down.

How did you reach the point of choosing donorflex as your CRM partner?

Once we'd made the decision to change from our other system to a new one, we arranged several presentations.

The one that really got us, and that really made the decision to go with donorflex, was when Steve came and presented to us.

The biggest thing for us was his understanding of how we work, and the expectation that we had of what we wanted from our new system. We had also liaised with some other local organisations that were donorflex users and had had very positive feedback.

So, all of those went into a package which made us go down that route of choosing donorflex as our new CRM system.

What can you tell us about the quality of the data translation and migration?

In terms of the data translation, firstly it happened a lot quicker that we had anticipated.

Secondly, the quality of the data, when we got it, we were able to be up-and-running almost straight away. Within a couple of days that we had done some training with stuff that we were going to be using it at that point.

We were up-and-running really quickly. We knew where things were. Everything we looked for was there. And certainly in better shape than it had been left in our previous database.

How has the donorflex implementation period gone when you measure it against your expectations?

It's gone really well. Really well.

We were prepared that it was going to take us between six to 12 months to really get up to speed. Certainly, with Steve's help, and with the way it's been structured, we've managed to do it in two. Which is pretty amazing.

So, we're really happy with where it's gone. We're really happy with how it's going, and there's' still quite a lot for us to learn after only two months. But we feel like we've divided the way we're going to manage it into two phases.

So Phase 1 was three to six months, and we've done that in two.

We're now on to Phase 2. We're looking at other modules that are available that we've not had access to before, such as Organised Events, and Pledges.

Why did you choose a server-based system, rather than heading for the cloud?

One of the big issues for us that we've had as an organisation is about data security and making sure that the information we keep on donors – and we do keep details such as bank details for regular givers – was making sure that was secure.

One of the things that we were3 able to work with donorflex on was making sure that that was the case.

Absolutely we have a server on site with our data on that's encrypted. It's completely and utterly safe. That was a big issue for us.

Things have gone really well in term s of what's happened since the implementation of the database.

Everyone that needs to use it is now using it.

We're able to use it for things that we weren't previously able to use it for.

Our fundraisers are now using it to keep track of how much they've raised at any point, whereas before that wasn't possible until the end of the month.

Our finance team are working with us to make sure that we're reconciling what's on our database with what's coming in to our bank and, again, being able to import stuff has made it much easier. Very happy.