

Family Links selects Workbooks CRM to help reach a wider audience and drive greater operational efficiency

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Monday 25th September 2017, Reading, UK: Workbooks announces that Family Links, a national emotional health charity, has chosen Workbooks CRM to improve its ability to communicate and engage with thousands of professionals around the UK.

Family Links (<http://www.familylinks.org.uk>) believes that emotional health is the foundation for achievement and happiness, and is dedicated to helping adults and children live flourishing lives, fulfil their potential and make a positive contribution to their community. Family Links delivers innovative, high-quality training to health, education and social care professionals, the voluntary sector, schools, universities and workplaces.

With a mix of communication channels and business systems including a website, Mailchimp for email marketing, Outlook for email, spreadsheets and SAP Business One accounting, Family Links is typical of many ambitious, mid-sized not-for-profit organisations. The charity needed to streamline operations and find a much more effective way to share information about prospective partner organisations, training provision and training feedback. The charity was also launching a new area of work, Emotional Health at Work (<http://www.emotionalhealthatwork.org.uk>), and needed to both segment these separate areas of impact, and view information across the organisation as a whole.

“With growing demand for our services, we wanted to find more effective ways to manage relationships with new contacts and our existing partner organisations,” explained Gail Allan, Business Development Director at Family Links. “Our reliance on spreadsheets, email and a bespoke training administration system, meant we were spending too much time manually collating data and moving it between systems rather than focusing on efficiently providing professionals with the best service.”

With funding from a variety of sources and pro bono support from the Fossil Foundation, Family Links was investing in outreach programmes including email marketing, to raise awareness of the Nurturing Programme, but measuring the success of this activity was almost impossible.

Having prepared a CRM System Specification document, Family Links kicked-off a project to review CRM solutions from a selection of vendors. The detailed document covered typical areas such as opportunity, account and contact management, import and integration of data, marketing and website integration, workflows, fundraising and reporting, with a priority assigned to each requirement. The assessment process also took consultancy, training and on-going support into account.

“We have quite sophisticated requirements so it was very important to find an easy-to-use solution, from a vendor who could understand our requirements and support us through the implementation process,” confirmed Allan. “Another important factor was the on-going cost of ownership, and with no on-going support costs and an approach to system administration that encourages the customer to become self-sufficient, the Workbooks (<http://www.workbooks.com>) proposition was very attractive.”

The ability to cost-effectively use email marketing to promote the Nurturing Programme was a key

consideration for the new solution, and with new GDPR data protection regulations due next year, the ability to track contact history and consent in a single platform was also important. "Data protection is an important issue for the charity's trustees, and with contact data held in different systems it would be very difficult for us to demonstrate compliance with the new regulations," said Lucy Willoughby, Business Development Coordinator. "So it made sense to take advantage of Workbooks' new email marketing tools (<http://www.workbooks.com/gatormail>), and replace MailChimp with a fully-integrated solution that would keep all our contact data in one place, streamline our marketing processes, enable the Business Development team to follow-up on campaign responses quickly, and allow us to easily monitor the ROI of our different campaigns."

Allan added: "We're looking forward to enjoying the benefits of a professionally implemented CRM system for business development and marketing in the coming months, and then adding other parts of the organisation as our CRM journey with Workbooks develops."

"We are very proud to be selected by a worthy organisation such as Family Links," said John Cheney, CEO at Workbooks. "It's important that we help our customers in the charity sector to drive efficiency and optimise the services they deliver using the funds provided by donors and grants, and our new Workbooks GatorMail is very popular with customers who want to cost-effectively combine email marketing and CRM in a single platform."

About Family Links

Family Links is a national charity dedicated to empowering children, parents, families, schools and workplaces to be emotionally healthy. Our vision is a world where adults and children live flourishing lives, fulfil their potential and make a positive contribution to their community. Family Links believes that emotional health is a human right and that it is the foundation for achievement and happiness. We deliver innovative, high quality training in the Nurturing Programme to health and social care services, the voluntary sector, schools, universities and workplaces. The Nurturing Programme is designed to provide adults and children with the understanding, skills and ability to lead emotionally healthy lives, build resilience, empathy, self-esteem and support positive relationships.

For more information, visit www.familylinks.org.uk.

Family Links has just launched Emotional Health at Work. We have spent 20 years developing, delivering and evaluating emotional health programmes across the UK and working with national and local government organisations, corporates and charities, universities, schools and families. We have now developed a series of modules and workshops designed to improve employee engagement, increase staff retention, reduce stress and absenteeism, increase employee focus, productivity and motivation and lower level of mental and physical health difficulties through better emotional health at work.

Find out more: <https://www.emotionalhealthatwork.org.uk/>

About Workbooks

Workbooks delivers cloud-based CRM and Marketing Automation applications to the mid-market, at an affordable price. Workbooks extends beyond sales, marketing and customer support to include order management and fulfilment, invoicing and supplier management, at a price which is typically 50-70% less than solutions such as Salesforce or Microsoft Dynamics.

Workbooks joins up the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the competition.

For more information, visit www.workbooks.com.

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