



Hart Square creates CRM training for Children & the Arts

Prince's charity relies on Hart Square to enable staff to maximise its CRM system

Independent charity

Thousands of children leave school having never set foot in an art gallery, watched a performance in a theatre, or listened to an orchestra play. **The Prince's Foundation for Children & the Arts** is the only national educational charity committed to ensuring that all children in the UK are inspired by the arts.

Since becoming an independent charity in 2006, Children & the Arts has worked with more than 100 arts organisations across the UK and introduced over 300,000 children to the arts.

In common with many charities, Children & the Arts needs to carefully manage its interactions with supporters, donors and other stakeholders to ensure smooth operations and to maximise income streams.

"We invested in a CRM system, The Raiser's Edge, in 2011 to manage our donors and stakeholders, but we recognised six months on that we weren't really enabling our staff to use the system to its full potential," explained Rebecca Darke, Senior Development Manager at Children & the Arts. "We hadn't been provided with any training by the CRM system provider, so people started to evolve their own way of doing things, which was not ideal."

Identifying a need

Having identified that there was a need for staff training on the CRM, a referral from its sister charity, The Prince's Foundation for Building Community, seemed to provide a solution to the problem. "We heard that PFBC, who have the same CRM system as we do, had been working with Hart Square on training and integration projects,

Key benefits

Hart Square's knowledge and expertise of the CRM solution enabled:

- The Foundation's training needs to be fully assessed
- Training programmes to be implemented to meet the needs of key staff
- Comprehensive training manuals and documentation to be provided
- The integration of processes and sharing of information 'all in one place'.

so we decided to contact them," said Natalie Adams, Development Coordinator at Children & the Arts.

Hart Square is an independent specialist in providing CRM services for not-for-profit (NFP) and membership organisations, and has worked exclusively in these sectors for over 12 years. "We were impressed by Hart Square's experience of The Raiser's Edge software, and its track record in helping organisations like the PFBC," said Rebecca Darke. "It was obvious from our initial conversations with them that they could help us train our staff to maximise the use of the CRM system."

Hart Square's first task was to scope Children & the Arts' training needs. "Hart Square's experts came in and looked closely at what we were doing, met with key staff and gained a full understanding of



Photograph © Ellie Ku

what we are all about,” explained Natalie Adams. “They then provided us with a detailed outline of how we could train people in how to use the system more effectively, taking into account our processes and how we could improve them using the CRM.”

Rebecca Darke added: “The good thing was that we didn’t need to explain our needs – Hart Square’s experts already had the experience of going through this process many times with charities like ours, so they knew almost instinctively what we needed. They were able to immediately tailor the CRM training to our specific requirements.”

Training programme

Natalie Adams added: “Hart Square’s experts outlined and undertook comprehensive staff training sessions, initially with a core team of seven people. They also produced very comprehensive training manuals and documentation to support each of our units. The training was not generic but aimed very specifically at each unit’s needs. They were really very thorough in their approach.”

One of the immediate and fundamental shifts at Children & the Arts was that the CRM system users were able to integrate their processes and share information ‘all in one place’, thereby fully harnessing the benefits of the CRM.

“For fund-raising projects, team members are able to share all relevant information and track progress more effectively,” said Natalie Adams. “The training also ensured that people became less scared of using the CRM. It really instilled confidence in all our users.”

With existing users now fully trained on the system, and full supporting documentation, a ‘template’ for new users had been established. Rebecca Darke added: “When someone new joins us we have all of the manuals and documentation needed from Hart Square to enable us to bring them up to speed quickly with the new system.”

Benefits

According to Natalie Adams, many everyday processes – such as recording Gift Aid for donations – have been made smoother and easier since staff have become more confident in using the CRM.

“We can process donations faster and ensure much easier reporting of our financials, which are obviously very important processes within a charity such as ours.”

Rebecca Darke concluded: “Hart Square has really helped us maximise the investment we have made in our CRM system. Their deep understanding of CRM and fundraising processes really came through in the training and they were able to instil confidence in people who didn’t really know what CRM is all about. I think it’s fair to say that they not only did what we asked them to do, but there were also projects, such as setting up a test system, where they went above and beyond the call of duty to help us.”

Key services provided

- Training requirements gathering
- Training programmes
- Training manuals and documentation support.