

# Transforming operations for a growing charity organisation

Integrating web design, branding, marketing automation, CRM, MS Office 365 and cloud based file sharing into a cohesive and affordable solution

## ■ BACKGROUND

Harry's Rainbow (HR) was established to support children and young people in the Milton Keynes and surrounding areas who have been bereaved of a parent or sibling. This is provided through information and guidance offered on their web and social networking sites, plus various bereavement support services. These include regular support groups, activities, trips, and individually tailored support packages.


Following seven successful years, HR were feeling growing pains across many areas of their operations. Tasks such as registering new families or separating contacts for targeted communications were manual processes using spreadsheets or paper based forms. In order to sustain growth and secure continued funding to reach and support more families a radical overhaul of their work flow and online presence was required. Odette Mould, CEO and founder turned to Plexus to help build a new brand and website, but discovered they could offer an integrated solution combining marketing automation & CRM with cloud based application and file sharing.

## ■ THE WHOLE IS GREATER THAN THE SUM OF ITS PARTS

HR was not unlike many organisations today that are using spreadsheets to maintain contact lists. Moving to a Customer Relationship Management system (CRM) which is an application designed to manage and record engagements with prospective and existing customers can provide huge benefits. Being a charity organisation, HR needed to capture information on a wide range of stakeholders including the individual members of the families that engage with their support activities, volunteers, fundraisers, corporate partners and staff. The introduction of GDPR in May 2018 also meant that ongoing communications and storage of personal data would need to be managed for compliance. Plexus were able to build a customised CRM system linking directly to the HR website and social platforms, automating much of the contact capture and GDPR compliance process. The power of the new CRM system was then greatly enhanced with the addition of Marketing Automation which streamlined outbound communications.



## Client Profile


 **Organisation Name:**  
The Harry's Rainbow Charitable Trust

 **Location:**  
Milton Keynes

 **Year Founded:**  
2011

 **Website:**  
[www.harrysrainbow.co.uk](http://www.harrysrainbow.co.uk)

 **Number of staff:**  
10+

 **Key Activities:**  
Providing support packages and activities for children bereaved of a parent or sibling.

## ■ SUCCESSFUL COMMUNICATION IS A TWO WAY STREET

A website, no matter how well presented, will not deliver results unless traffic is directed to it. Plexus work with HR on an ongoing basis to implement Google Ad Words campaigns and combine the results of these with social network follow-up to ensure people who have shown interest are kept informed of new events. Many organisations still run their communications blind, not knowing who has engaged with campaigns or having analytics to determine if marketing efforts are resulting in new traffic. Through the Marketing Automation system HR could now deliver much more targeted and measurable campaigns to their stakeholders and receive detailed information regarding who had engaged with the content being sent. This includes time spent by a visitor on each web page and the origin of that traffic e.g. Google, Facebook or other social sites.

## ■ MAKING POWERFUL ENTERPRISE-CLASS SYSTEMS AFFORDABLE

Marketing Automation is a new term for many; it provides the ability to monitor audience engagement with your communications, then using that information you are able to automatically present them with more focused and relevant material. The aim is to move them closer each time towards the interaction you wish to have with them. For HR this could be obtaining sponsorship from corporations or individuals, or presenting appropriate support material to bereaved families.

Marketing Automation systems are traditionally expensive, residing in the realm of large corporations who have marketing teams to administer them. Plexus can take away that complexity and deliver this as an optional part of a complete web solution, subscribed monthly and without upfront costs.

“Online registrations feed directly into our CRM automating much of the data capture process. Reducing the time and effort for families ensures early intervention for the bereaved child needing our help”

*Odette Mould, CEO, Harry's Rainbow Charitable Trust.*



### ■ DOES YOUR WEB SOLUTION WORK FOR YOU, .... OR CREATE WORK FOR YOU?

Odette and her team analysed the time spent undertaking administration tasks within the charity. Prior to engaging with Plexus, registration of a new family could take up to 6 hours. The new CRM linked web solution enables the registration process to be automated and recorded in a shared location. In addition, the Marketing Automation function ensures that families are responded to from the moment they click to register, providing a welcome message and giving them confidence that their enquiry has been seen and will be responded to. Similarly, the team previously spent significant time on administration related to the regular family participation events organised for their beneficiaries. Admin for these events is now handled via CRM linked web forms as well as communications to fundraisers, volunteers and corporate sponsors. Odette now has feedback on who has opened each communication with the system also assisting in GDPR compliance. Odette estimates that 10 hours of administration time has been saved on a monthly basis.

### ■ UNIFIED COMMUNICATIONS & BRANDING

An important part of establishing and maintaining an impactful brand identity is to ensure that you have consistency across all forms of marketing communications. The graphic design team at Plexus worked closely with HR to not only enhance their brand design but to ensure that all communications were unified within managed branding guidelines. The end result is to create a recognisable brand regardless of the output medium; whether it is web content or printed flyers, the HR brand should be easily recognisable. This helps to build brand recognition amongst all target audiences. The development of branded templates by the Plexus team for many forms of communication such as presentations, web banners, case studies and posters means that HR can focus on content and then quickly release new material with a consistent look and feel.

“The changes Plexus have implemented for us are so important to the charity, the website is the gateway to our support services for the community and helps to raise awareness for families in need of that support, as well as attracting new volunteers. The CRM delivers a robust information management system, leading to a more efficient charity.”

*Sam Turner, Chair, Harry's Rainbow Charitable Trust.*





## ■ A WEB SOLUTIONS PLATFORM DESIGNED FOR GROWTH

Odette and the HR team now have a web solution that can scale with them as their organisation grows. Basic website updates can be implemented quickly and easily by the team, with more substantial updates managed by Plexus as part of their web solutions package. All CRM, Marketing Automation, MS Office 365 and One Drive system configuration, plus a Website Pro Platinum Package have been donated by Plexus.

## ■ A NEW APPROACH TO WEB SOLUTIONS DELIVERY

Every organisation has to decide whether to outsource website development or undertake that work in-house. There are many services available that offer a DIY website for an apparently low monthly cost which may at the outset appear attractive. Important considerations when following this approach include the actual amount of time it will take to develop an attractive functional website, even if the service offers a range of templates to get you started. Very often there are hidden costs for optional 'bolt-ons' which are required to make your website truly functional. Following the outsourced route generally requires a large upfront setup cost, with site updates and enhancements charged on a time and materials basis. This upfront cost in many cases is prohibitive for many small organisations.

Plexus has revolutionised web solutions delivery with a new affordable fixed monthly cost model that focuses on delivering a website that actually brings results to your business. CRM, Marketing Automation, integrated cloud hosted telephony and collaborative file and application sharing, plus ongoing website updates can all be built into an attractive monthly subscription with no fixed term contracts.

“The new systems have really helped my day to day duties, removing all time consuming elements of how we communicate means that I have much more time to promote HR and gain more funding”

*Emma Gilead, Fundraising & Events Manager, Harry's Rainbow Charitable Trust.*

