Success story

CRM Best Practice AWARD

Diakonie

Whether nursing care, pastoral counselling or advice – the Diakonische Werk sees itself as a "Counsellor for children and families, the sick, those in need of care and refugees".

CAS genesisWorld

At a Glance

Sectors: Non-profit organisations/ Social Institutions

Objectives/Requirements

► Standardised, consolidated address database
► Electronic member file
► Groupware functions such as calendar, tasks and e-mail to accelerate the administrative work
► Active and purposeful administration of members
► Web portal for the members
► Exchange of information between the members

Benefits and Advantages

► Reduced effort for updating addresses, members update their addresses themselves
► Complete, fault-free, up-to-date data
► Easier administrative procedures
► Avoidance of double work
► Standardised, consistent advice for members
► Better communication within the institution
► Mutual qualification of the employees
► Incentive for more efficient work
► Documentation of services vis-à-vis the members
► Attraction of resources for the improvement and extension of the range of services

A Pioneer for Social CRM

Customer Relationship Management is advancing to become an obligation in the private economy. This is not the case with socioeconomic companies: there, the use of CRM systems is (still) an exception rather than the rule. This is where the Diakonische Werk Berlin-Brandenburg-schlesische Oberlausitz (DWBO) plays a forerunning role. With its pioneering decision to introduce CRM for the management of its members, this top association of freely organised welfare institutions is already showing today how Social CRM will develop in the future.

As a voluntary association of institutions and services belonging to the Evangelical Church with about 420 member companies which have 52,000 employees working in the social and healthcare sector, the DWBO is the third-largest Regional Association of the Deaconry in Germany. In total, 120 DWBO employees advise the member companies with respect to legal and organisational questions, promote an exchange between the members and clarify the need for finance with the State and insurance companies.

Increasing competitive pressure and complex requests from members

As a result of the introduction of nursing care insurance and privatisation in the 1990s, competitive pressure increased and consequently the DWBO's financial resources shrank. At the same time, requests from members relating to financing, remuneration and outsourcing became more and more complex. A dilemma: how can the DWBO comprehensively continue to handle the requests coming from its members at all? Thomas Dane, Commercial Director of the DWBO discussed this question together with the Heads of the DWBO, including Bishop Dr. Wolfgang Huber, who was a member of the Supervisory Board until 2005.

The aim: active and purposeful advice

There was an urgent need for action in the entire communications area. Sometimes members posed the same question to several employees from different departments because of a lack of unclear responsibilities – which took time and was rarely efficient. "Our objective had to lead to an improvement in the internal and external exchange of information, in the working procedures and in transparency", is how Thomas Dane describes the challenge at that time. The provision of active and purposeful advice by the employees with respect to the quality of the "services" for the members had to be optimised along the lines of 'One Face to the Customer'. "In order to bring about this objective in reality, we took the decision for CAS genesisWorld, which aroused unanimous enthusiasm and exceeded our expectations", recalls the Commercial Director. Finally, the specific requirements were defined and a specification was worked out – as well as an exact project plan and time schedule. "During previous IT projects, we were frequently unable to keep to the schedule", according to Dane, "but this project ran completely according to plan." Within six months, SMC IT AG, the CAS Partner in Augsburg, implemented the new solution.

Implementation step-by-step

In order to ensure exemplary implementation according to basic ethical principles, the decision was made to introduce the new system step-by-step. At first, a standardised, consolidated address database was created as the basis. For this purpose, the numerous Excel lists, Access databases and addresses of members which were kept on stickers, were transferred over into the new system. At the same time, the possibility for DWBO members to update their own addresses and those of their institutions themselves was created through a web portal. This was followed by the second stage which implemented

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Project data

► CAS genesisWorld at 120 workplaces
► Implementation within 6 months
► Implementation according to ethical principles
► Step-by-step introduction of the system
► Interface to the telephone system
► Integration into the web portal
► Adaptation of resource administration to seminar room administration

Customer

Diakonisches Werk Berlin-Brandenburg-schlesische Oberlausitz (DWBO), Berlin, Germany
www.diakonie-portal.de

► Top association of freely organised welfare institutions
► Voluntary association of installations and service providers belonging to the Evangelical Church
► 120 employees
► 420 member companies with about 52,000 employees
► Third-largest regional association of the Dea-conry in Germany

Project partner

SMC IT AG, Augsburg, Germany
www.smc-it.de

CAS genesisWorld

► Professional customer management
► Supports internal processes, raises efficiency
► Especially for the needs of SMEs
► Very good price-performance ratio
► Flexible, integrable, extendable
► Established product with several awards
► Over 110 CRM specialists provide on-site support
► More than 1,900 businesses work successfully with CAS genesisWorld

the groupware functions, such as the joint calendar or the team-oriented administration of tasks. Finally, the roll-out began, starting with the Management Board and those departments with an affinity for IT, then from division to division.

Workshops create acceptance

In the end, training took place in workshops for all employees who learned for the first time about the already functioning system with fully migrated data. "The feedback from the employees was surprisingly positive. "We could take away the employees' fears during the workshops. We showed what they could expect and they recognised the benefits arising from the new program which led to a significant simplification of the administrative procedures."

Central address database and electronic member files

Today, the employees work on the basis of the central (address) database, which makes various access rights to the necessary address information available on the field level of each department. As all communication channels are integrated in the CRM solution, all requests from the members flow into the electronic member file regardless of whether by telephone, e-mail, fax or letter. All important information concerning a DWBO member is documented there. At the push of a button, distribution lists are generated and current information is sent to the members by E-Mail-Newsletter, form letters, fax, etc.

Efficient telephoning and lean administration of resources

The interface to the telephone system facilitates automatic call identification, which opens a telephone screen with memo function. This also includes automatic dialling from the software, automatic recording of the time and duration of the conversation, automatic linkage of the telephone call with the address and a list of missed calls. With additional programming, CAS genesisWorld was extended to an extensive and convenient seminar room administration.

Members update data themselves

To raise the actuality and correctness of the data, the members update their data themselves in their personal web portal and continuously receive updated information from the divisions of the DWBO there. Social services are sold through online booking systems. In this way, for example, short-term care places can be booked. Other modules such as those for the online advertising of jobs, online booking and administration of training courses, CMS-supported deaconry portal and online donations will be implemented shortly.

Highly subsidised at one time – highly efficient today

Before the introduction of CAS genesisWorld, the work of the DWBO was highly subsidised and not very economical. Thanks to the application of CRM, this situation has changed substantially. The DWBO has achieved enormous improvements by using CAS genesis-World. Those employees who were overwhelmed at one time have become more competent contacts, who consistently provide the members with information and the effect to the outside has become professional. "Our members benefit from this as their requests can be answered more quickly and handled more professionally." With the saving in time achieved, the DWBO now not only offers improved services, but quasi an extended range of services. "We can approach our members more actively and support the exchange of information between the members better." Not the least because of these extremely re-markable facts, the DWBO was distinguished with the Gold CRM Best Practice Award during the CRM Expo.

Social CRM – a trend for the future

The example of the DWBO shows that – different from the situation in the private econ-omy – socio-economic facilities with CRM are less involved with evaluations and key indi-cators. The focus is rather on the improvement of communication, working procedures and transparency. By using CRM, the DWBO is setting an important sign for the future as a "market leading" institution of the Evangelical Church, and proves that there is more than just a short-lived trend behind the buzzwords Social CRM, but rather a technology which is oriented to the future and which meets the required ethical principles to the best extent possible and supports the employees of a welfare institution in the performance of their daily work.