ContactSuite

Customer Communication in Charity Contact Centres

ContactSuite Limited
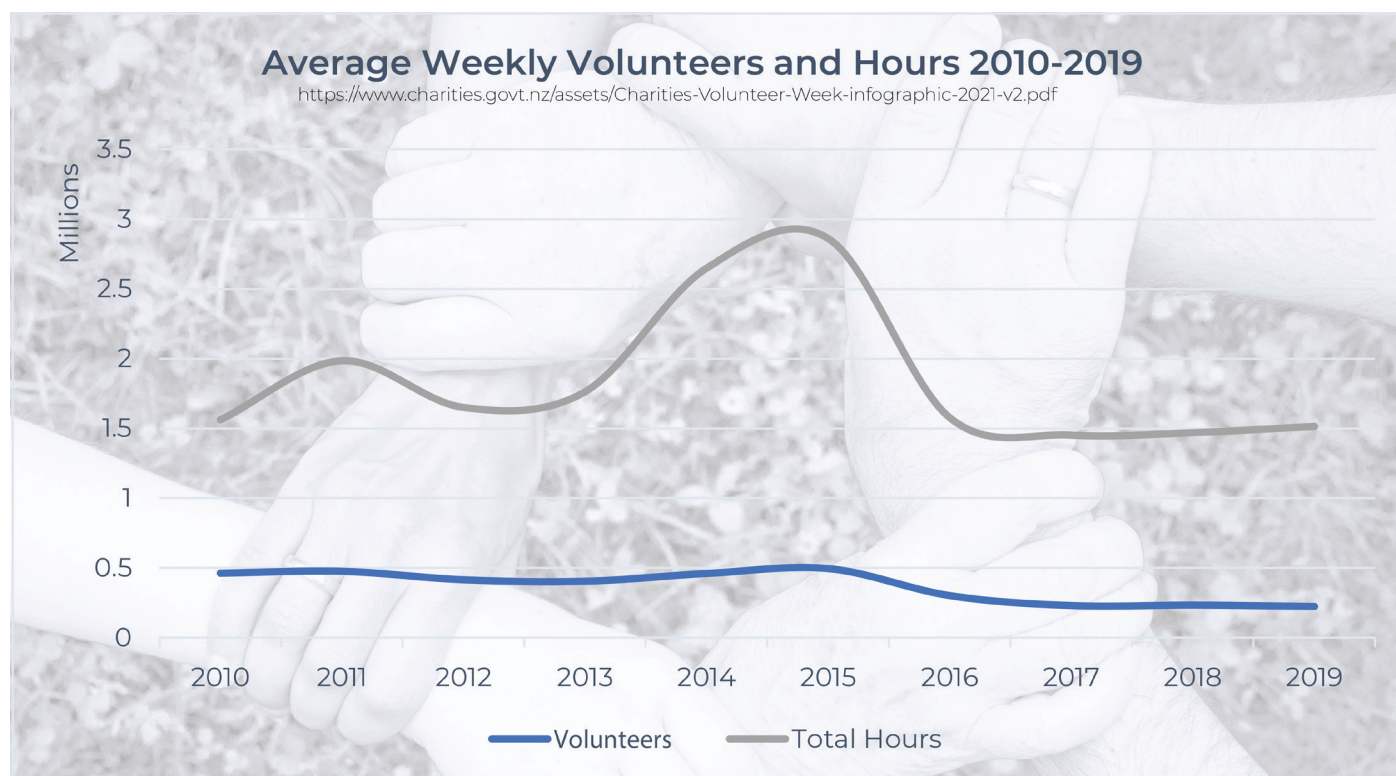
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WHITEPAPER

Diverse and varied, charities are a big business sector, with big business challenges.

The traditional picture that comes to mind when thinking of charities, is one of volunteers stood in public places with collection boxes, or more recently iPads and Eftpos terminals. Yet, donations, fundraising and koha accounts for only about 20% of charity income[1], and the charity sector is in fact, much broader and more varied than most other industry sectors.

1.5 MILLION volunteer hours per week

With almost half of charity income[1] coming from "service and trading" across the sector, it's clear that charity is a big business sector – yet it's one that still relies on significant number of volunteers and volunteer help– around 1.5 million hours per week .

Whilst the total number of volunteers has been slowly, but steadily declining over the last 10 years, the number of volunteer hours has remained high, even increasing slightly over the last few years[2]. Growing challenges in appointing new volunteer and paid staff, along with increased average wage costs have meant that it's more important than ever before for organisations to work efficiently and cost effectively.

Average Weekly Volunteers and Hours 2010-2019
https://www.charities.govt.nz/assets/Charities-Volunteer-Week-infographic-2021-v2.pdf

Volunteers Total Hours

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1 https://www.charities.govt.nz/assets/the-sectors-year-in-numbers-data.pdf
2 https://www.charities.govt.nz/assets/Charities-Volunteer-Week-infographic-2021-v2.pdf

To understand how the changing environment has affected our charities, ContactSuite reached out to a number of NZ based charitable organisations to find out how their frontline communicates, and how it was supported with tools and resources.

Channels

Email is the dominant communication method across the charities we spoke to, closely followed by much more traditional print communication (including mail-outs as well as other printed material). Unsurprisingly though, social media is growing to be a major channel, now beating face to face, phone, and website communications.

Whilst the pandemic, and its associated restrictions, had some impact on communications - particularly face-to-face - the real flow on from this has been a much greater level of flexibility for employees and volunteers of many organisations to be able to work from home, or another remote location.

Communication Channels

- Email
- Print
- Social
- F2F
- Phone
- Web
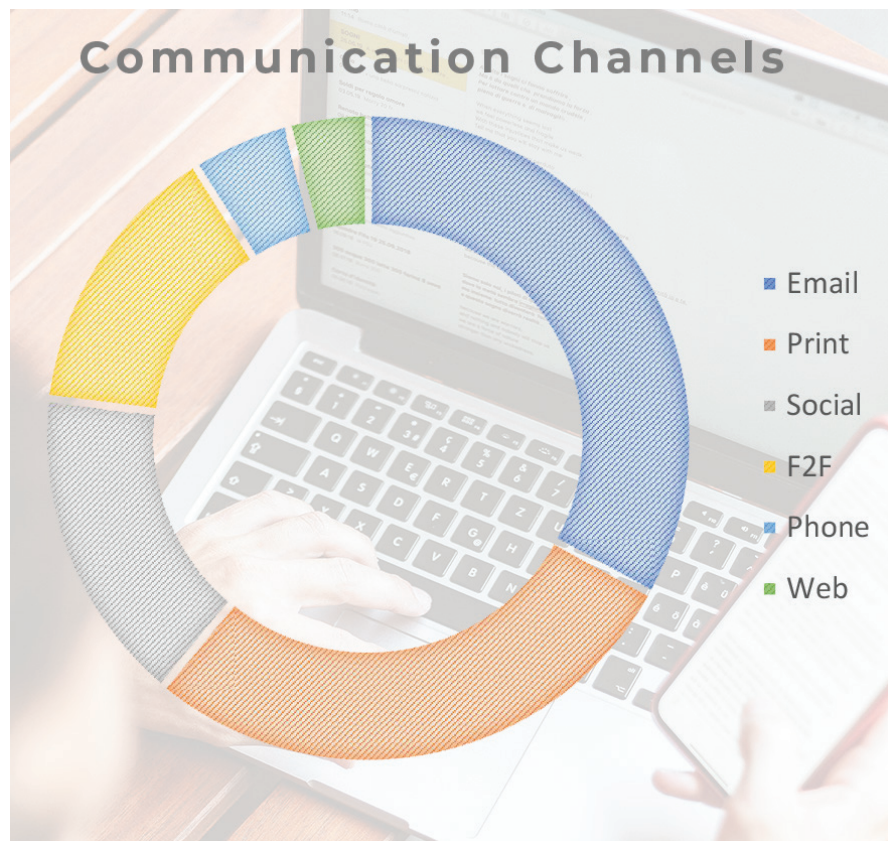
Working from Home

More than 50% those we spoke to have continued with a greater proportion of their team working from home on one or more days every week (in times where it was not necessary to do so) than before the COVID-19 pandemic. It was frequently noted that the availability of technology, such as good internet access, and web-based tools, had made it much easier to work remotely, and most organisations said they were now in a better position for any future lockdowns or restrictions than they were prior to March 2020.

Despite the more distributed workforce however, training and onboarding of new staff in general remained an "in the office" activity. Training times were typically short, often just one day or less – although most stated that ad-hoc and on-the-job training were key in upskilling staff and volunteers. The comparatively

50%
have more
Home Workers
than pre-COVID times

short period of lockdowns experienced in New Zealand to date (compared to other locations worldwide) has meant that developing remote onboarding capabilities has been less of an urgent task. This however does present a possible capability gap in an uncertain future and a problem that may need to be addressed.

"Knowledge changes are ad-hoc, and are communicated to the team through email"

Knowledge Management

There was a great deal of variation on how knowledge, scripts and documentation is stored and accessed. Whilst a small number of organisations had built basic archives of documents and wikis using tools like SharePoint, the majority we spoke to are using Word or Google Docs or Excel/Sheets documents. A move to store these documents in the cloud has made it easier (particularly for a more distributed) team to access knowledge – but changes are often still sent out to many team members at once with email, and careful control is needed on who can change and update these documents. Responsibility for managing and maintaining these documents often sat with one individual.

CRM

62% of those we spoke to use some kind of CRM or donor management systems or are in the process of or intending to implement on in the next 12 months.
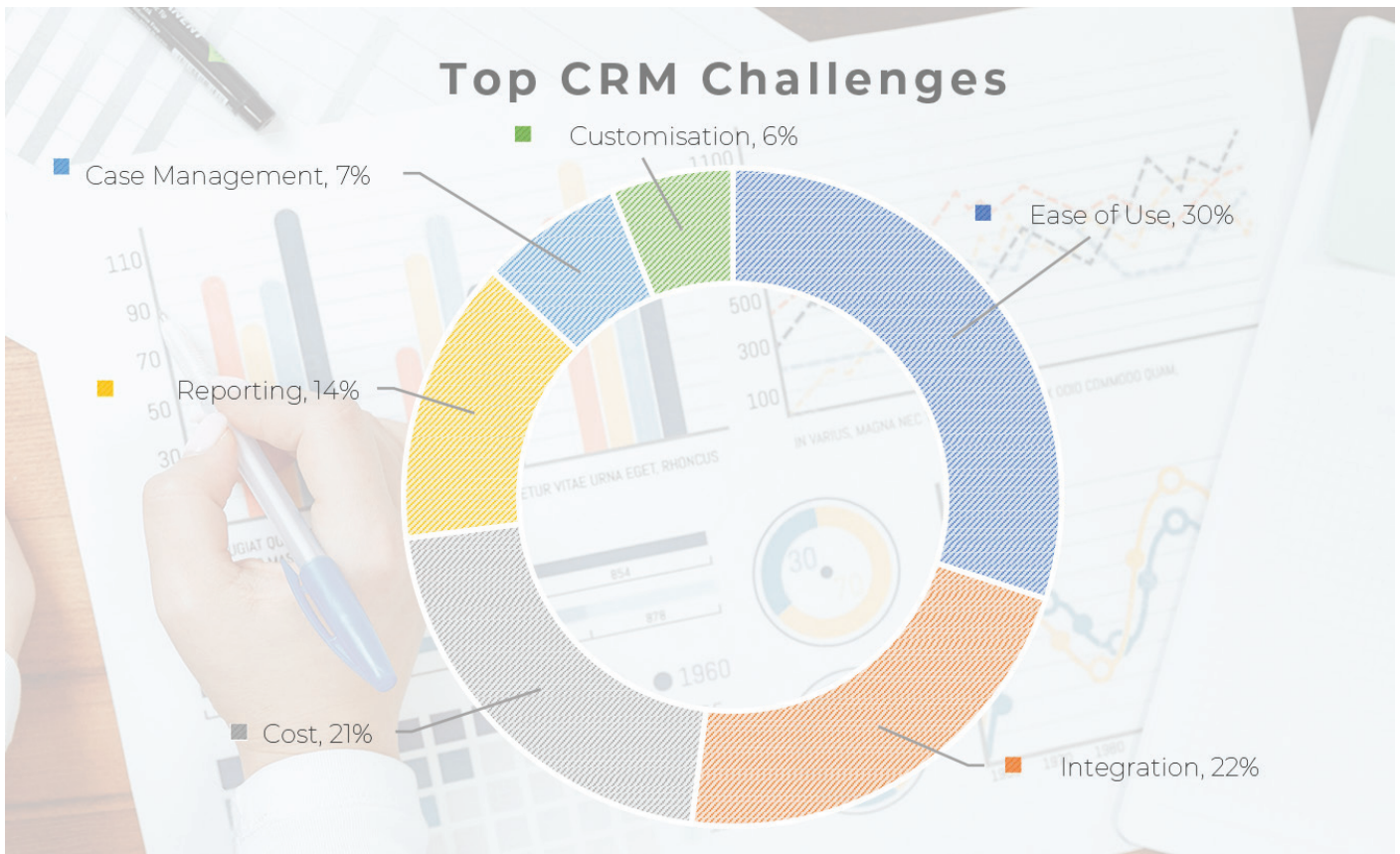
Whilst around half of the CRM platforms in use were dedicated to the charity and fundraising sector, most reported challenges with the using these platforms.

30%
r e p o r t e d
Ease of Use
to be the biggest
challenge with CRM

Ease of use was easily the largest challenge reported with use of CRM systems. Organisations want their frontline teams to spend time focussing on the job at hand rather than on the tools that are supposed to make the task simpler.

The need for organisations to use multiple systems, which rarely talk to each other, also resulted in challenges where CRM platforms either couldn't integrate or would be too costly to integrate, leading to difficulties reconciling and consolidating data between platforms

Given the nature of the sector, it's unsurprising that the cost of CRM is a key consideration. The wide and varied ways the sector

Top CRM Challenges

- Customisation, 6%
- Case Management, 7%
- Ease of Use, 30%
- Reporting, 14%
- Cost, 21%
- Integration, 22%

works was also reflected in feedback that the platforms in use tended to be difficult to customise – either for reporting purposes or customising what data is captured and displayed on screen. Organisations want the tools to work how they want to work, rather than change their working practices to match the software.

"We're spending too much time on the CRM and not enough focusing on the task"

Since no two businesses are alike in the way they want to collect, use and analyse their data, then reporting is always a focus – and with the often-constrained resources within our charities, then this was reported too with our respondents. Good data is key to setting business goals and any lack of flexibility and tailored reporting options impact organisations abilities in this area.

Where ContactSuite fits in

ContactSuite offer a range of technologies and solutions that are aimed at simplifying the frontline experience and allowing organisations to focus less on the "nuts and bolts" and more on delivering a consistent experience.

In talking to organisations about the frontline, a common and consistent message is that those staffing those teams are not "good at tech" and can find it hard if processes are complicated or diverse, to collect and process the right details at the right times. A simple error such as forgetting to capture a date of birth, or making sure an appointment matches availability, can cause real "back-office" problems that are often not visible to the front line.

ContactSuite's tools were built to address these very types of challenge – to make it easier for the frontline to get it right every time, without needing "remember" things to move the process forwards.

SenseIQ Knowledge Management

SenseIQ (www.GetSenseIQ.com) is ContactSuite's knowledge management platform. It's optimised for exactly the type of knowledge that is most useful to frontline communicators.

In order to be effective, knowledge should be provided as short, informative, "first person", knowledge "bites". Replacing the traditional cycle of Search / Read / Understand / Interpret / Paraphrase, with a more direct Search / Response approach - that can be read out, emailed or messaged directly (or even accessed via API from a 'bot or website), greatly increases efficiency and accuracy.

By linking these knowledge "bites" together using SenseIQ's decision tree feature, even complex processes and agent scripts can become a simple to follow, step by step approach that requires minimal training or learned knowledge.

"To be the most effective, use short, informative, first-person knowledge-bites."

Of course, it needs to be easy to manage and maintain this knowledge, and SenseIQ also has this covered with its smart import, built in "authorisation" process for new knowledge, "time and date-based" articles, and version history and change tracking. User feedback and comments and reports on knowledge usage also give the clear insights to the knowledge manager.

Frontline CRM

Providing a complete frontline solution beyond knowledge alone, is where the ContactSuite CRM comes in. Like most CRM solutions, ContactSuite allows you to track contact details, interaction history and even a fully featured case or ticket management system. Unlike others, ContactSuite is purpose designed to make it easier for your frontline to do the job right.

> # "Integrate systems so your frontline only needs one 'pane of glass' to get the job done"

Working with multiple systems is hard. It's even harder when you're on a phone call. When you're working from home, especially from a laptop, with just one screen, it's harder still, and you have the added risk of making mistakes.

Rather than working against other systems in your organisation, ContactSuite works with them. Using API and other integration, the ContactSuite team can integrate your existing systems so that your frontline need only one "pane of glass" to do their job. Reducing the risk of error, making the team more efficient, reducing cost, and improving customer experience.

Cloud Contact Centre

ContactSuite can help you move your phone system "into the cloud" with native cloud telephony integration that can be deployed at any scale, using only your agents web browser, from just one or two to hundreds of agents . ContactSuite can also integrate with many existing telephone systems .

Inbound and Outbound calls, emails and even Facebook messages can be managed, controlled, and tracked. Build contact or follow-up campaigns that will automatically deliver the next contact amongst your team, wherever they might be located. Customised contact forms, or "screenpops" – so called because the correct screen with the right customer data will "pop" automatically as a call or contact is made or received.

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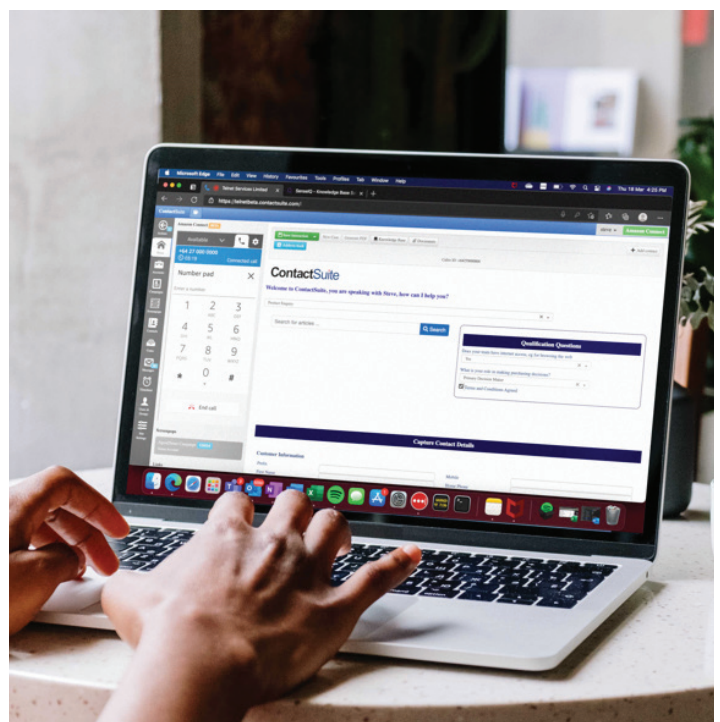
Intuituive Workflow

Screenpops are far from just static forms; Intuitive condition/action logic allows complex scripts, processes, and workflows to be presented in an easy-to-follow manner, including SenseIQ knowledgebases, scripting, and data from other systems (via APIs), and webpages. Once a call ends, data can be emailed, sent via SMS, or put directly into another CRM or management tool without any further action from the agent.

ContactSuite Supports Charities

The Charity and Non-Profit sector in New Zealand is a diverse group of some of the most hard working, and sometimes least rewarded frontline people in the country. It's also a sector with a lot of complexity and customer interaction. ContactSuite supports our charity sector with significant discounts over standard pricing for all registered charities.

Get in Touch

For more information on how ContactSuite can help your organisation and how to take advantage of discounts, visit our websites at:

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