

CRM system helps Canadian political organization stay connected with its constituents

Governmental entities, non-governmental organizations (NGOs) and non-profits are all looking for ways to reach their constituents in an affordable and effective way that allows them to build closer, long-term relationships. A new customer relationship management (CRM) solution designed by OSF Global Services is helping a large political organization based in Canada stay better connected to its members than ever before.

Like other public entities, the Canadian political organization found itself struggling to conduct business and communicate effectively with its constituents due to an outdated CRM system and disconnected applications that were used across the organization. Adding to the problem was the fact that the organization had a limited budget that could be used to address the problem. And that's where OSF Global Services came in.

Choosing the right solution

To help the political organization fix its problems, it turned to OSF Global Services. Meeting with the organization's staff members, the OSF Global Services consultant quickly determined the key areas of concern and began developing a new customized CRM solution using CiviCRM and Drupal software.

Although the organization's current CRM solution was based on CiviCRM, the older version of the software did not offer the functionality and capabilities that the group now required. Since costs were a concern, the OSF Global Services consultant decided to stay with CiviCRM, which is designed specifically for NGOs and is available free of charge. The choice of Drupal, a free open source content management platform that allows organizations to publish, manage and organize content on a website, was also another easy and affordable choice.

Targeting constituents successfully

A key concern of the organization was its inability to target its constituents with newsletters and other communications. While the organization was able to collect data on its constituents using the older version of CiviCRM, the new solution offered improved functionality that allowed workers to better capture and manage member information. The solution also enabled the organization to track the activities of the constituents, including when donations were made, the political events a member wanted to attend and the subscription lists a member wanted to belong to.

In addition, the new version of CiviCRM offered a mailing feature that replaced an older application that had not been tied into the original CRM application. With these new mailing system, the organization has improved its ability to communicate quickly and effectively with its members, plus reduced the amount of time and energy required to perform these tasks.

The new solution also provides improved levels of security by establishing different levels of access to member data based upon specific personnel and regional criteria.

In addition, the OSF Global Services developer successfully migrated the organization's existing constituent data into the new version of CiviCRM. Other applications used by the organization were also merged together to provide workers with a single access point for all member data. The developer also seamlessly integrated CiviCRM with the Drupal content management platform to ensure that member information collected via the organization's website was captured properly and stored for future use.

The results

The new CRM solution has helped the political organization enhance the services it provides to its constituents. By integrating a number of its applications, the organization has also reduced costs and enhanced productivity by streamlining its business processes.

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