



Anglican Youthworks pushes the boundaries with CRM

As a large, multi-faceted Christian organisation with an annual budget of \$9.5 million, Anglican Youthworks Sydney (AYW) required a totally integrated solution, allowing financial management, reporting and intelligent fundraising & marketing features.

AYW did not have a full customer relationship management system to handle all their contacts and link to their financial information. They instead had three separate systems, one for financial management, a second for their bookings and another unconnected system for their fund raising activities. When evaluating the viability, and eventual replacement, of their previous financial system, AYW found that whilst the existing system allowed good data entry and processing, it lacked flexibility and scalability. This became clear when after five years the organisation had totally outgrown the incumbent system.

AYW carried out an initial review of four business software packages. Greentree was a competitively priced alternative with wideranging functionality and was chosen as it exceeded AYW's specified criteria. There were a number of factors for the move to Greentree, however pricing was critical. For AYW the solution needed to meet their investment level, but make no compromises in delivering the functionality to develop their activities. Accountant, Fei Lim explains, "As we are a not-for-profit organisation, we have to be diligent in making sure the money is well spent. We're getting the best value from both the Greentree product and professional services offered by the Greentree Business Partner. We have had good account management from a number of consultants who have been supportive of what we want to achieve."

Very, very integrated

AYW chose to implement the Contacts & Relationships, Sales & Marketing, Bookings Management, Fund Raising and Counter Sales Modules from Greentree's Customer Relationship Management (CRM) suite, and was impressed by the integration to Greentree Financials, which strongly influenced the decision to choose Greentree.



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Fei Lim, Accountant - Anglican Youthworks



CUSTOMER
Anglican Youthworks



INDUSTRY
Not-for-profit



LOCATION
Australia



**GREENTREE
PRODUCT SUITE**

- Financials
- Distribution
- CRM
- Supply Chain Management
- Screen Customisation Manager
- Workflow
- Approvals & Alerts
- Webstore

"It's excellent to have an integrated system organisation-wide. Month by month accounting has been improved overall and the visibility of the financial status is much better for the management team, who have been able to get more from the system."

John Cross, Director of Business & Finance - Anglican Youthworks

Fei comments, "Our goal was to have one fully integrated system. When the evaluation process first began, we were impressed that a CRM package directly integrated to a financial management system could provide such functionality, and match our unique needs as a fundraising organisation." Greentree's CRM integrates with their Accounts Receivable, Accounts Payable, Inventory, and General Ledger seamless and with absolutely no data duplication.

There were some obvious concerns about implementing a new system, namely networking and how the system would best fit their needs without too much customisation, given the complexity of our organisation. A number of factors reassured them about Greentree, some employees had heard of the heritage and success of Greentree's CBA software and had seen the Greentree demonstrations. In addition, they received positive feedback from current Greentree users. With this in mind, we believed Greentree would deliver a solution to build on." Fei believes the training program worked well for the 20 users, in terms of both pricing and the participants resulting capability with Greentree. "The training was quite intensive and valuable with a high level of proficiency and support."

Very, very, responsive

Greentree is making a direct impact on the success of AYW by freeing up resources that were previously tied down by labour intensive administration. They can now eliminate the following transactions: double handling of AP invoicing for head office and Outdoor Education and Conference centres and camp sites, import/export of New Zealand data, month end processing and monthly manual journals to General Ledger. We also have improved reporting. She continues, "Greentree's Fixed Assets is a great time saving module as we previously manually processed fixed assets. It's a definite improvement. Our resources can be used for more effective marketing and channelled into other areas of our work."

Very, very, co-ordinated

Greentree's CRM provides AYW with a powerful base allowing effective management of lists, invitations and bookings for their Outdoor Conference Centres, training courses and conferences, as well as tracking all sales and service processes and communications for their 25,000 customer, prospect and donor records. "We are pushing the boundaries of CRM. We have extremely complicated CRM, fund raising and booking requirements. Our experience in the field means we require a sophisticated product," explains John.

Comprehensive and integrated coordination of events and resource bookings can be a major challenge for many organisations, so AYW rely heavily on Greentree's Bookings Management system. Fei explains, "The integrated system we wanted has been achieved. Our management are able to see reports of the bookings, which are quite easy to do."

A future requirement is to be able to take bookings for their Outdoor Conference Centres via the internet. "We hope to have an online conference booking facility in order to streamline our bookings processes and reduce the manual entry and duplication," describes Fei. With Greentree's WebStore AYW now has a more automated system in order to remove such manual tasks. Their on-line book shop, eStore, enables them to target and generate sales from publication customers in Australia, New Zealand and overseas.



ABOUT ANGLICAN YOUTHWORKS

AYW has an annual budget of \$9.5 million and has four main activities – publishing, outdoor education and conferencing, church resourcing and educational advocacy through the Anglican Education Commission.

Based in Sydney, AYW is a major Christian publisher in Australia and overseas. AYW established and runs the Youth Ministry Training College, and also operates a range of camping ministries for young people.

For more information visit www.youthworks.net

ABOUT GREENTREE

Greentree International specialises in developing highly effective business management software solutions. The Greentree product has been developed by the authors of CBA, arguably the most successful business software package for small to medium sized businesses in Australia and New Zealand.

In choosing Greentree you are selecting a business system that will truly empower your organisation today and grow with you into the future. The Greentree Partner Network provides a highly skilled local support team that will ensure you achieve tangible business benefits. Greentree has also been recently recognised as a global 'Rising Star' by MIS magazine Australia.

For more information visit: www.greentree.com

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"very, very, responsive!"