



TOGETHER TRUST

Together Trust delivers individual care, support and education services across the North West of England. The organisation cares for and champions the rights, needs and ambitions of children and people with disabilities, autism and mental health differences.

The Requirement

Together Trust needed to replace its legacy CRM software with a modern cloud-based solution that would be easily accessible to its fundraising team. Trevor Kerr, Head of Digital at Together Trust, explains their challenges.

“We were running Donorflex on an internal PC, but remote access by VPN was so slow it became unusable. We had already done a lot of work to move our structure to the cloud with Microsoft 365, so we identified Dynamics 365 as a replacement to manage our fundraising activity.

“Based on demonstrations, Dynamics offered everything we wanted, but we encountered problems with our implementation partner and their solution. They didn't come from a nonprofit background, and ultimately, they couldn't grasp what we were trying to achieve.

“The Dynamics 365 Nonprofit Accelerator was the basis of our solution, but we quickly discovered it didn't do many things and was very American in its formatting.

“We started to incur additional expenses for bespoke development work and found that our partner was less responsive. Their priorities were changing, and we felt they didn't have the time or attention for smaller organisations like us.

“We were struggling to get Dynamics 365 working as intended. With only patchy training received, our project was failing at that point.”

Highlights

- Charity Hub deployed to provide extended functionality and bridge gaps with Dynamics 365 Nonprofit Accelerator.
- Increased user adoption of Dynamics 365.
- Efficient processing of donation transactions with Enthuse Integration.
- Improved forecasting insights.
- Knowledge transfer enabling project leaders to increase Dynamics 365 self-sufficiency.

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Trevor Kerr
Head of Digital
Together Trust

The Solution

Together Trust sought a new partner to get their project back on track, as Trevor continues.

"When we researched alternative providers, we saw examples of the work that Preact (now part of ANS Group) had done in our sector, and they already had their own charity product for Dynamics 365.

"From our initial sales engagement, we found their team very approachable. It was refreshing to see that they wanted to teach us how to do a lot of things ourselves rather than spending time writing specifications and pricing up requirements. This allowed us to quickly become more self-sufficient from a position where we wanted to do many things but couldn't.

"Moving from our previous supplier was a smooth process as Preact's onboarding program was excellent. Their team went the extra mile to understand our issues and document what had been developed. This meant that time wasn't wasted repeatedly explaining the same detail.

"Preact came back with a roadmap to get us where we wanted to be. There weren't any surprises around pricing, and everything was as we'd hoped. We also received access to eLearning and support portal resources that our previous partner didn't offer."

The Outcomes

"We haven't retained much from the Dynamics 365 Nonprofit Accelerator because these processes were better handled in Preact's Charity Hub," says Trevor.

"Today, we are in a great position. Our fundraising team are now enjoying using Dynamics on a day-to-day basis.

"Preact's consultants went above and beyond expectations to research our various fundraising transactions. Rather than just telling us how to upload a transaction, they spent time setting up, improving and testing mappings from our Enthuse platform.

"We can also use Charity Hub to record details of donor pledges for challenges such as the London Marathon, as well as tracking recurring subscriptions for our lottery. Our forecasting hasn't previously been effective, but this will give us better visibility of the expected funds due in the coming months. Inbuilt Dynamics 365 dashboards are a great starting point, and we are excited by the prospect of using Power BI analytics."



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Trevor also highlights the benefits Together Trust's fundraising team has gained from native integration between Charity Hub and its other Microsoft technology.

"We previously followed a time-consuming process to save emails into a folder and then attach them to the contact. Now we have this configured to track through Outlook. The team are delighted with how much time is saved with Dynamics 365 and Charity Hub when tracking our donor correspondence. They are also seeing the benefit of integrating SharePoint folders with individual Dynamics 365 records to simplify document management."

The Future

Dynamics 365 training proved crucial in helping Trevor and his team plan further updates to their system.

"Microsoft's learning material can be hard to piece together, but from our training with Preact, we saw how the various parts connect and what can be achieved with Dynamics 365.

"With the Trust, there are other processes that are currently manual. We are now looking at how to map these into Dynamics that will drive work and provide real-time insights for our management team.

"We are early into our journey with Dynamics 365, but we already have several projects shortlisted to formalise processes that are currently loose.

"Preact's team has continued to support us by quickly answering our questions, and it's reassuring to know they are there if we encounter any issues. We are excited about the range of possibilities offered by Dynamics 365, and we look forward to extending our usage of the system with support from the Preact team."

We thank Trevor for sharing his experiences. To learn more about Together Trust and its life-changing support services, visit www.togethertrust.org.uk.

How can we help your organisation?

Contact us to understand how your organisation can advance its digital transformation with Charity Hub and Microsoft Dynamics 365.

www.preact.co.uk



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