

CHARITY CHALLENGE: CASE STUDY

DOCUMENT CONTROL

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Author	Phil Haigh			Date	9 January 09

1. CASE STUDY

This document comprises a case study of the work done with Charity Challenge since 2006. We have worked with them on their application database, unlimited IT support and website development.

1.1. THE CLIENT

Charity Challenge are a travel company providing adventure challenges for people raising money for charity. They work out of a main office in London with about 15 staff who manage the operations.

1.2. EXISTING SYSTEMS

The company had a bespoke built MS Access database which held most of the details on their clients and bookings and handled some of the operations.

1.3. ENGAGEMENT

The company had been requesting a new system to replace this and we were approached along with a number of other companies to submit a bid for the work.

When the other firm could not deliver on time and had to cancel the project, Mercury1 were called in by the customer to start from scratch with half the time already gone. To put your mind at rest, we did manage to deliver the project on time and within budget.

1.4. SOLUTIONS

Mercury1 have provided a full range of services to Charity Challenge since 2006, each are detailed in a separate section of this case study:

- Business application
- Customer facing websites
- Unlimited support
- Google AdWords campaign

2. BUSINESS APPLICATION

The core service provided to Charity Challenge has been the business application, nicknamed “Summit”.

Summit was conceived in 2006 to replace an existing Access system that managed a few details of the work Charity Challenge do in organising and administering trips and bookings.

As we discussed requirements with Charity Challenge, it became clear there was great scope for development of a system that could automate a large number of time consuming tasks, streamline the business, and enhance the service provided to customers.

Some key aspects of the Summit are detailed below.

2.1. BOOKING AND CUSTOMER MANAGEMENT SOLUTION

Summit provides the ability for all customer information to be stored in the database, both entered by Charity Challenge staff in a backend, or through customers registering or booking online.

The information captured is rich, covering personal details, booking information, passport information, medical conditions, next of kin and more.

Any critical aspects of this information that are missing for a customer placing a booking are flagged and automatic reminders are sent to the client (for example missing or incorrect passport information for a pending trip).

2.2. WORKFLOW MANAGEMENT

Summit heavily uses the concept of queues. When a booking (or a charity registration) enters a certain state it is placed in a suitable queue, and (if necessary) the members of staff responsible are notified.

Once the action has been taken, the status of the item is changed automatically and the item leaves the queue (and joins another if necessary).

Having a single page view of items requiring action makes it easy for staff to manage their work, and to check that there is nothing outstanding.

2.3. TEMPLATED REMINDERS

Summit allows reminder templates to be set up. An example might be a “Trip Reminder for Joe Blogs (Flight Co-ordinator: 3 weeks prior to trip departure, reminder me to call the airline and confirm seats”.

Every time a new trip is added (and there a lot), a reminder is set up from the template, and on the required day Joe will receive his reminder. Beyond setting up the original template (which each user can do in the backend in seconds), this is all transparent and completely automatic.

2.4. MANAGEMENT AND BUSINESS REPORTS

Summit contains a wealth of information. Indeed, it contains ALL of the information about Charity Challenges bookings and customers. As such, it has the facility to produce extremely useful management and business reports. A (very) few examples are:

- Booking frequency report
- Cancellation frequency report
- Demographic report (age ranges and gender of travellers overall and by trip) – for marketing purposes
- Medical report (provided to the company doctor to ensure travellers are fit and well)
- Financial reports (of various types)

2.5. CHARITIES AREA

Because Charity Challenge works closely with a number of charities, providing participants in challenges who in turn raise money for the charity, we have developed a reasonably sophisticated Charities module of Summit.

This leverages the full range of information stored in Summit to provide member charities with a number of valuable and/or time saving tools. For example:

- Online authorisation of participants at the click of a mouse (and download of relevant required documents about each participant (automatically generated in PDF form for each participant))
- Marketing based tools – the charity can create dynamically generated PDF posters and brochures using their own branding with up-to-the-minute trip information from Charity Challenge
- Contact tools – automatic email templates to respond to enquiries quickly and conveniently
- Statistical reports about participants supporting them through Charity Challenge
- A wealth of instructional information about working with Charity Challenge

2.6. CMS

As well as all of the challenge (trip) information that is automatically published onto the website, there is also a full Content Management System (CMS) that allows Charity Challenge to modify almost every page of their website(s).

2.7. INTEGRATION WITH THIRD PARTY SYSTEMS

From time to time Charity Challenge have had a need to share data with other systems – for example a charity who requires an export of booking information for their own records.

Because Summit is bespoke, we have been able to create an exports in the ideal format – in this example that the charity can automatically download from within their members area and simply load into their own systems.

3. CUSTOMER FACING WEBSITES

The CMS contained within Summit currently drives 2 distinct customer facing websites:

- www.charitychallenge.com
- www.communitychallenge.co.uk

These are designed to showcase different types of challenge, and therefore have different designs etc (*skins*), whilst still presenting the same information. The number of websites could be added to or reduced depending on marketing goals.

Mercury1 have used the same concept on their website (www.mercury1.co.uk) – albeit in a slightly more frivolous manner (just because we can!).

4. UNLIMITED IT SUPPORT

Charity Challenge previously employed a member of staff whose role included IT management. At this time Mercury1 provided partial IT support cover, as a backup to the in-house expertise. When this member of staff moved on, Charity Challenge elected to take unlimited IT support from Mercury1, realising that this would actually save a reasonable sum on staff wages.

Full remote administration software is installed on all machines in the office, so Mercury1 can quickly and easily access and resolve any issues that may be forthcoming.

This facility is also used to provide quick demonstrations of anything that might be required. For example “how do I make this document into a PDF?”.

5. GOOGLE ADWORDS CAMPAIGN

Mercury1 manage Charity Challenges AdWords campaign to ensure that they get the most out of the money spent on their adverts with Google. Prior to asking Mercury1 to manage their campaign they ran their own starter campaign for a year but found that it was difficult to track how well the campaign was running, and what the impact any new traffic coming to the site was having.

Now they get monthly update reports and a site manager tweaking and monitoring the site and adverts to ensure that the most is being made from the budget. A key measure of the campaign management is ROI, so the customer has some solid numbers with which to evaluate their advertising campaign.