

# CMAT Assessment in Not-For-Profit

Case study

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CASE STUDY | SEPT 2014





Not-for-profit

**Our Client:**

The Communication and Public Relations Division of The Salvation Army's Eastern Territory (TSA) is responsible for all fundraising and public relations activities for NSW, QLD and ACT. With 10 Divisional & Regional centres, a call centre and 90 staff, this team is responsible for managing the relationships with over 1 million supporters including businesses, volunteers, individual donors and committee members.

**The Need:**

The Salvation Army recognised that in order to meet its ongoing fund raising objectives necessary to deliver its social welfare goals, work was needed to upgrade skills, processes and technologies for all donor facing interactions. The development of enhanced donor loyalty and commitment through the proactive management of donor relationships, and the integration of departmental knowledge and information flows across the Communications & Public Relations Department were considered critical priorities.

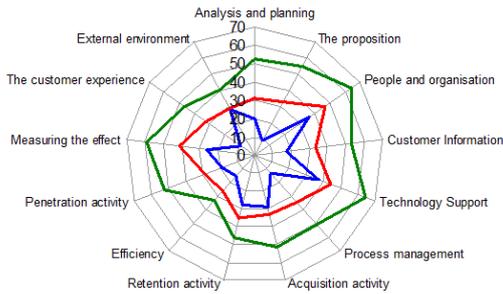
*"The key objective of this program is to be more connected with donors and to be highly relevant and pro-active. This means increasing face to face contact time with our donors, removing administration effort for officers and front line staff and improving committee development and recruitment effectiveness"* - Major Mark Campbell, Communications & Public Relations Secretary, TSA (Aust. Eastern Territory).

Although a primary focus for the program was to replace its legacy Appeals system with a modern CRM capability, TSA understood that in order to meet their strategic objectives it needed to start with a comprehensive assessment of its current supporter management capabilities . The scope of this assessment needed to cover all key areas of support management including staff skills and capabilities, customer processes and experience, supporter acquisition, retention and

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**The Salvation Army's legacy Appeals system was ... not able support front-line staff in managing supporter relationships.**

**“CMAT was a great reality check.”**



development practices, measurement framework, customer data management as well as supporting technologies.

In consultation with Customer Connect Australia, TSA elected to use the globally recognised CMAT™ assessment and benchmarking tool.

**Result:**

CCA conducted the assessment and benchmarked TSA’s donor management practices against demonstrated best practice and organisations with similar business models. The audit revealed a number of key priority areas that needed to be addressed.

The recommendations formed the basis of the overall program of work. CMAT™ also gave a clear, quantified rationale for the implementation of supporter management (CRM) technology.

*“CMAT was a great reality check. It formed the basis of our Donor Relationship Program and highlighted things we could do; the processes we could implement to make our system work. Because a number of people across the organisation were involved in the interviews, the process helped bring them on board with the project.”*

**Why Customer Connect Australia?**

CCA was chosen after a detailed, transparent process based on:

- CCA’s structured approach to Customer Relationship Management (CRM).
- Their accreditation in the global customer management benchmark, CMAT™
- Their ability to relate to TSA’s needs and people: *“CCA best met the needs of the Salvation Army. They connected with me & understood where we were at”*. John Herring (Supporter Relationship Management Program Director).

**Client Feedback:**

TSA found CCA’s knowledge and approach to be excellent; *“We have been guided and they have stood by us. We were pushed to stay on track and stay within the scope by focusing on the things we needed. Very early in the project we learnt to differentiate between the must haves and the nice to haves – which has worked very well. CCA’s approach to work is first class.”*

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