

Think tank uses ClearView CRM to merge 200 databases, save thousands of dollars

After a national public policy think tank implemented ClearView CRM, the change in its business was dramatic.

The most significant benefit came from ClearView CRM's powerful core database. The organization moved data from more than 200 individual databases it formerly used to ClearView CRM's database. ClearView's built-in duplication checking has eliminated the numerous duplicate records contained in the multiple databases.

Options add flexibility

ClearView CRM gives the organization the flexibility to use mailing segmentation and batch processing options that offer significant benefits:

- Users can schedule mailing queries to run whenever necessary. IT staff schedules batch processing and posting for off-peak hours, which is helpful in staggering jobs and improving system performance. Using automatic batch processing and payment acknowledgement, for instance, has decreased turnaround time on thank-you letters for donations from about two weeks to three days.
- ClearView's auto update function lets the organization keep a mailing history on all its prospects, which adds a new level of efficiency to resolving any issues. For example, when members previously informed the organization they had received two copies of the same publication, the organization had no way to track the origin of the mailings. Now, it not only can track the mailing history but also can use another mailing segmentation option to eliminate the duplicate publication mailings.

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The auto update feature saved us tens of thousands of dollars since we launched ClearView CRM. We have saved approximately \$200,000 in postage fees within the first year alone.

*Director of information services
National public policy think tank*

ClearView CRM also provides other tools that have increased efficiency and saved money:

- Users can query the database to create their own mailing lists
- By using an email address export file, departments can email information to the organization's members instead of using snailmail
- Staff can query the core donor database to create a list and send an email to the list on the same day
- Users can define their own database fields, which has been invaluable in the organization's implementation of the system
- By using the attributes fields in a ClearView prospect screen, users can create powerful descriptions of members at a glance. Mailing segmentation supplies these user-defined fields on a form that gives users the power to quickly generate highly targeted mailing lists.



Contact SofTrek

Learn how your nonprofit can increase productivity and save money with ClearView CRM.

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