

TechSoup

Consona Customer Management

Helping Non-Profits – 100,000 at a time



Non-profit organizations can multiply their effectiveness through the use of technology, just like profit-making enterprises can. But non-profits are often hard pressed to acquire the technology they so badly need. On the other side of the equation, many technology companies would very much like to donate equipment and software to worthy non-profits, but may find it difficult to identify appropriate candidates. TechSoup makes these connections with the help of Consona CRM.

Founded in 1987 as CompuMentor to connect technology mentors with non-profits in the San Francisco Bay Area, TechSoup has expanded exponentially to support product philanthropy worldwide. The organization's mission is to work toward a time when every non-profit and non-government organization (NGO) on the planet has the technology resources and knowledge needed to operate at its full potential.

In pursuit of this goal, TechSoup verifies the non-profit status of organizations, characterizes their primary activities and other essential information, and stores this data in a CRM system for use when working with potential technology donors. After struggling with a rudimentary database product in the early days, TechSoup moved to Consona Customer Management (CM) in 2005.

Connecting Social Benefit Organizations to Technology

Essentially, TechSoup acts as a registry, matching donor philanthropic focus with non-profit and library organizational missions. When a technology company wants to donate equipment or software, they tell TechSoup how much they can give and what kind of social benefit activities they want to support. TechSoup helps them make the connection with appropriate organizations that need the kind of technology they can make available. Non-profit organizations and libraries needing software or equipment register with TechSoup to connect them with available resources. Staff, board members or volunteers can join TechSoup, become an authorized agent of a qualified non-profit or library, and place a donation request on their behalf. Individuals and organizations register by completing an online form, and the information is stored in the Consona CM application.



ROI at a Glance:

- \$1.8 billion savings to social benefit organizations.
- Successfully secured the contract to operate an international registry for NGOs under the sponsorship of the Council of Foundations.
- Streamlined service operations.
- Website integration supports 24x7 self-service.
- Systematic data collection makes TechSoup the partner of choice for technology vendors seeking to contribute philanthropically.
- A unified and consistent view of important information for customers and internal staff saves time and money.

Consona CRM integration with our website provides a unified and consistent view of important information for our customers and internal staff, streamlining service operations and supporting self-service 24x7.

— Laurie Sanchez, Director of Customer Services, TechSoup

TechSoup uses Consona CM to manage the database of donors, organizations and individual members, and facilitates the matching and the actual transfer of goods and services. When a donation request is fulfilled, only a small administrative fee is charged which supports the work TechSoup does—TechSoup is also a non-profit organization.

Along with software and technology donations, TechSoup provides many technology reference and learning resources through its website, including articles, webinars, forums and e-newsletters.

Global Reach

While it may be easy to identify true non-profits in the U.S. with the help of their IRS tax status, that's not necessarily the case in other geographies. That's why late in 2009, the Council of Foundations issued a contract to develop a repository of philanthropic organizations with a registry to do the vetting – in effect certifying organizations are true philanthropies and characterizing their goals and operations in order to be able to match them with donor organizations' objectives. TechSoup won that contract – and their Consona system was no small part of TechSoup's appeal to the council. "The flexibility that we have in defining the criteria for certification and the traits we can track as things change was really the key to this contract, and Consona Customer Management is the key to that flexibility," according to Steve Egelman, TechSoup's CRM Software Engineer.

In addition to industry-leading CRM functionality, the Consona technology and connectivity were of particular appeal to the TechSoup selection team. "We wanted a product built on standard Microsoft technology," Egelman says, "because it was already familiar and we know that it is solid and supportable." A big part of that is the ability to customize screens (without changing programs) and the ability to create methods and processes as needs change and business expands.

Now that TechSoup is actively working with affiliated organizations in many countries, it is particularly important for them to be able to connect directly with affiliates that are unlikely to have the same level of technology available to them. "Web services are important to us," Egelman says, "We can easily connect with partners that are using open source systems because of these open and widely-used standards."

In addition to continued expansion around the globe, TechSoup plans to continue improving the services they can provide. "We are focused on customer-driven innovation," says TechSoup Director of Customer Services Laurie Sanchez, "and we want to facilitate the sharing of best practices among our member organizations."

"And many organizations that could benefit are not yet registered with us," adds Marketing Manager Lara Franklin. Meaning that there is much work to be done and TechSoup is eager to charge ahead and do it. With the support of major corporations and many involved individuals, they will no doubt help philanthropic organizations "operate at their full potential," as it says in their mission statement.

About TechSoup

- Unique non-profit linking other non-profits and libraries to the technology hardware, software and information they need to more effectively achieve their missions.
- \$5.1 million in donations
- Serving 127,000 non-profits and libraries globally
- 42 donor partners
- NGO partners in 33 countries

About Consona CRM

With a comprehensive set of solutions spanning self-service, customer management, chat, communities and proactive, just-in-time marketing and support—all fueled by a patented, best-of-breed knowledge management platform and backed by advanced analytics—Consona's KCS *Verified* tools are the choice for integrated, multi-channel customer service and support.

The only CRM vendor focused entirely on service and support, Consona helps the Global 2000 control costs while providing a superior customer experience.

Consona

Problem: Solved!

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