

# Client Case Study

## Provida implements 100+ user Sage CRM solution at Sydney Legacy



### ► Client Background

Sydney Legacy is a voluntary organization founded by returned servicemen pledged to care for the families of deceased comrades who served Australia in war, peacekeeping operations and in other hazardous service, from World War 1 to present day.

Legacy offers Australian Defence Force (ADF) personnel peace of mind in knowing that as they defend us and our freedoms, Legacy stands ready to defend their families by caring for their loved ones should the worst happen.

Legacy assists Widows and Children in coping with life, both financially and emotionally, whether they be young or old. They provide pension advocacy, organise accommodation, fund education, loans and the important special things such as companionship and even pocket money for school age children.

Legacy is actively involved in contributing to the development of young people. In conjunction with the NSW department of education, Legacy offers the Legacy Junior Public Speaking Award. This award is aimed at 12 to 14 years old in government and non-government schools throughout the state. It promotes research and oral communication skills, whilst increasing the confidence of young people.

Legacy volunteers, called Legatees, keep in touch with people on a personal basis, to provide the highest level of advice and care possible. Legacy Community Service Workers also care for people who have a disability. Legacy seeks to improve their lifestyle including respite breaks and regular social activities.

### ► The Challenge

Over the years Sydney Legacy has developed separate in-house database applications for the various departments and functions of the organisation.

Following a decision to amalgamate all of the databases into a single CRM solution in order to remove data redundancy and enhance data quality, Sydney Legacy reviewed three CRM solutions and chose Sage CRM.

There is not much to choose from in terms of a CRM solution that meets all the requirements of a not for profit organisation. Sydney Legacy required a CRM that includes functions such as donation processing and membership. It also favoured Sage CRM for its existing integration into Accpac.

Provida has been supporting Sydney Legacy's Accpac installation for close to a decade and was approached to design and implement a customised CRM solution that incorporates Dependant welfare, Donation and Fund-raising, Membership, Volunteer Management, Purchasing as well as Dependents' loan processing and Pension claim processing databases and workflows.

Sydney Legacy's vision is to continue to work with Provida in building and enhancing this solution as well as looking to roll-out this solution to other interested Legacy Clubs.

### ► The Provida Solution

Provida implemented 100+ Sage CRM users in Sydney Legacy's head office. The web based software was heavily customised to suit Legacy's unique charity processes. Workflows, screens and fields were customised to allow the solution to be rolled out to Legacy clubs around Australia.

*"The Provida-customised Sage CRM solution enables Sydney Legacy to provide improved care for our dependents by providing our Community Service Workers and administration staff with a complete history and profile of each dependent. The end-to-end financial transactions provide transparency and control as to does the common interface which streamlines processes throughout the organisation."*

Yaniv Rahav, ICT Manager,  
Sydney Legacy

### ► Achievements

- The implementation of single database which delivers relevant and accurate information to all areas of the organization and guides functional areas through defined workflows.
- The ability to link purchase orders with dependant records in order to analyse actual cost of support.
- Integration of donations and purchase orders directly into Accpac provides a total organisation end to end view of all donations and financial transactions.

## Sage CRM

### At a Glance:

**Key Challenge:** Implementing and customising Sage CRM to suit the unique process requirements of a major Australia charity.

#### Key Achievements by Provida:

Complete redesign of Sage CRM to suit a NFP.

**Industry:** Not for Profit (NFP)/Charity.

**Solution:** Sage Accpac ERP, Sage CRM

**About Provida:** Since 1999, Provida has been a leading Australian ERP software integrator, implementing ERP and CRM solutions in many mid-sized businesses. Provida has offices in Sydney, Brisbane and Melbourne.

*For more information about Provida and how we can make a success of your business, visit [www.provida.com.au](http://www.provida.com.au).*

