



Northumberland National Park Authority creates knowledge reservoir with Sage SalesLogix

Client profile

Northumberland National Park was designated as a protected landscape of outstanding beauty in 1956. The Park stretches from Hadrian's Wall in the south, through the rolling valleys of the Tyne, Rede and Coquet to the impressive hills of the Cheviots on the Scottish Border.

The National Park Authority exists to conserve the landscape, heritage and wildlife of 405 square miles (105,000 hectares), over a fifth of Northumberland – and to provide opportunities for people to enjoy and understand it. It is also committed

to supporting the local economy in and around its borders to ensure a thriving, living countryside for future generations.

Amongst its wide-ranging duties, the Park Authority also manages a World Heritage Site, hundreds of listed buildings and scheduled ancient monuments, and thousands of historic environment records. In its care are over thirty Sites of Special Scientific Interest, three National Nature Reserves and more than a thousand kilometres of paths. It also maintains visitor information, facilities and services, together with dry stone wall boundaries, signs, stiles, car parks and picnic sites.

The challenge

The Authority generates and maintains large volumes of information on the organisations and people with whom it works, including central government, farmers in the Park, partner government agencies, other National Parks and the general public.



Formerly, each department worked with different databases ranging from Microsoft applications such as Access, Excel and Outlook to paper systems. Individual departments would often be in contact with the same person or organisation and yet waste time and energy maintaining separate databases, unaware of the diverse information being stored. Managers recognised the need to create a central database of shared information to avoid this duplication of effort. The goal was to increase visibility of the Authority's communications and enable contact details entered once to be accessed by all departments.

This internal drive for a new system was complemented by a central government initiative to implement electronic government. Funding became available to develop a customer relationship management (CRM) system.

The solution

The main priorities for the Northumberland National Park Authority were to find a solution which would be easy to customise and use, with the flexibility to scale up over time.

The Authority was already using some Sage products, such as Sage Payroll. In addition, Knowledge Infrastructure Officer Katherine Topping had personal experience of using the Sage ACT! Contact Manager to handle contacts for a large conference, and was interested to see what Sage could offer as the next step up to greater functionality.

Katherine notes, however, that the Authority reviewed many potential systems before deciding that Sage CRM SalesLogix, running on Microsoft Windows 2003 Server and XP, would fulfil its technical, operational and financial criteria, adding: "Cost is always an issue for any government

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Northumberland National Park Authority.

funded organisation and in SalesLogix we found a system offering value for money, with the added advantage of being web-based, so users can gain access through a browser from our different offices."

The involvement of Sunderland-based Sage Business Partner Bond CRM was also an influential factor. "When Managing Director Derek Curtis and Customer Service/Operations Manager Louise Willacy visited us to explore our requirements, we were impressed by their genuine willingness to understand our business and felt that they would provide the responsive, local support we needed. This confidence has subsequently proved well founded."

Katherine recalls, "Implementation didn't take place at an ideal time: a major document management initiative was being rolled out concurrently and significant organisational changes were also under way, but we had every help from Bond CRM."

The benefits

Today, SalesLogix has around eighty users at four Northumberland National Park Authority sites: most are based at the Hexham headquarters, but there are some twenty users in the picturesque market town of Rothbury,

around ten at Once Brewed which is close by Hadrian's Wall, and two at Ingram in the Breamish Valley.

Isolated 'silos' of information have been replaced by a centralised reservoir of information, securely shared over the web by users throughout the Authority. This eliminates the problems associated with multiple data entry, improves the accuracy of data and keeps it up to date.

Katherine stresses, "To gain maximum value from any data management system, it's essential that the data is constantly refreshed and updated. Over time, our users are coming to recognise how important it is to coordinate all our data. Everyone can share their knowledge to maintain and update the database with new information, such as new contact details or to make notes on the key points of a discussion. We then save time and effort by not trying to reach people who have moved on to other roles."



Consistency of communication is a major benefit, as Katherine goes on to explain, "If local farmers contact us – about an environmental issue, for instance – it's essential that they receive the same response from every Authority representative. With access to the notes logged at each contact point, any officer can now view the history and ensure callers receive a consistent message. What's more, if someone is out of the office, their colleagues have information at their fingertips to pick up and answer their calls."

SalesLogix manages internal organisational information, too. A personnel database has been developed from which reports on sickness, holidays, training course attendance, and salary information can be quickly pulled. As a further example of its versatility, the Sage system is also used as to record asset management information on hardware and software used across the organisation.

Solution Overview

- Saves time and cost by maintaining a single, centralised store of information on contacts and projects
- Web-based access offers simple yet secure access at different sites across the Northumberland National Park
- Sharing information between departments supports consistent, efficient communication
- A cost-effective solution which grows to support the Authority's work, with the flexibility to handle operational data such as personnel and assets
- Strong, long-term support provided by Sage Business Partner Bond CRM

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The future

Continual customisation takes place as the Northumberland National Park Authority extends its deployment of SalesLogix and finds innovative ways to capitalise on the system's capabilities.

Testing is under way on a new planning system, where all submitted planning applications will be stored, along with process information and deadlines, to provide a unified repository of information for planning officers and others. The Authority is currently working with Bond CRM on applying the SalesLogix projects functionality to manage Sustainable Development and Action Area funding. A typical project could be

building a new footbridge to open up visitor access, or helping one of the Park's farmers to diversify into a new business opportunity such as opening a riding stable.

Rather than information residing with individuals, it will be available at a glance to everyone working on project. Information maintained in a plethora of spreadsheets will be stored under a single project title, so that everyone involved will be able to check the latest developments, add their own updates and access relevant contact details throughout the project lifecycle.

Katherine comments, "Once again, Bond CRM are being supportive throughout and constantly add value from their experience."

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