

CASE STUDY RESPONSE HANDLING & FULFILMENT ONBOARDING



SOLUTION-BASED, HASSLE-FREE ONBOARDING

Samaritans is a charity with a vision that fewer people die by suicide. They make sure there's someone there for anyone who needs someone, day or night. 46% of their charitable income comes via donations and a further 17% via legacies*. Reliability is essential and following issues with their existing supplier, they weren't confident to build their programme in the way they wanted. Migrating to Woods Valldata was the perfect solution.



“NOTHING WAS IMPOSSIBLE”

WOODS VALLDATA

“Given the issues we'd had with previous providers the most important factor for us were reliability, experience and flexibility. Woods Valldata showed they could deliver.”

Joe Campbell, Supporter Care Manager, Samaritans

THE GOAL

Samaritans were spending significant resource resolving fulfilment, data and client services issues to do with their supplier. They needed a reliable partner so that they could grow their programmes, and they needed to switch as efficiently as possible. Woods Valldata demonstrated they were the perfect response handling and fulfilment partner and Samaritans made the decision to move. Clear processes and well managed implementation with Woods Valldata meant the onboarding was collaborative throughout and everything went smoothly.

“There's a lot of different things that needs to be done when migrating to a new supplier. Woods Valldata made it all doable and the process felt calm.”

Joe Campbell, Supporter Care Manager, Samaritans

THE SUCCESS

- ▶ Stress-free onboarding in just 7 weeks
- ▶ Solution-based approach throughout
- ▶ Ticket-based process providing visibility and freeing up team time

SERVICES

- ▶ Onboarding
- ▶ Postal and electronic response handling including:
 - Data capture
 - Scanning
 - Banking
 - Thanking and fulfilment



*Samaritans Annual Report and Accounts 2024-25



OUR APPROACH

Audit

Woods Valldata understand the importance of effective onboarding. They take the time to get to know the requirements of each organisation. Projects start with a kick-off meeting with everyone involved both at the charity and at Woods Valldata.

Woods Valldata's experience, and advanced technology platforms, meant that they could determine what was needed. For instance, getting an in-depth understanding of the Samaritans' unique CRM made sure data flows were compatible without issue from the start.

"We knew it was important to have a company that could deal with our systems and help us get to where we needed."

Joe Campbell,
Supporter Care Manager, Samaritans

Implementation

Woods Valldata's solution-based and calm approach was appreciated by the Samaritans team. The process was managed by Woods Valldata using a RAID log which helped all parties know what needed doing, by who, and by when – even allowing for unexpected delays from the charity. The ease and simplicity surprised Joe:



SAMARITANS

"There's always caveats with systems – with onboarding. But we found it easier than we thought it would be. Nothing was impossible."

Regular meetings created a collaborative and trusted environment. The onboarding was successfully achieved within seven weeks. With Woods Valldata Samaritans had everything they needed to make the ongoing supporter experience excellent.

Continuous Improvement

"We have a great relationship with fortnightly calls to check-in as a team. The ticket-based system helps with briefing in campaigns, managing queries and provides clear visibility for everyone involved whether that's campaign managers, data team or supporter care."

Joe Campbell, Supporter Care Manager, Samaritans

Woods Valldata are constantly looking for ways to improve their service for Samaritans. They drive efficiency and find solutions. Whereas once campaign briefings would be channelled through one person at Samaritans, training initiated by Woods Valldata has meant that all Samaritans Campaign Managers can brief in independently. This has made things more efficient and given the ten-strong team more confidence.

The service, reliability and experience of Woods Valldata have enabled Samaritans to introduce new elements to their programme. In the two years following launch, they have worked together to:

- ▶ Introduce and fulfil a welcome pack for new donors
- ▶ Enhance the way data is transferred
- ▶ Improve how Gift Aid images are stored and accessed

And much more! The Woods Valldata and Samaritans relationship is a true partnership, helping them reach their fundraising ambitions and achieve more.

At Woods Valldata, we're here for you and there for your supporters.

We offer charities an unparalleled spectrum of outsourced fundraising services. Everything is managed in-house so you know the service you get is the best it can be. Whatever you want when you outsource your cross-channel fundraising programmes, we make your supporters feel appreciated and elevate your ability to achieve more.

We're your Partners in Possibility.

Partners in
Possibility