

Transferring Direct Debit processing to Access PaySuite brings peace of mind

Access working wonders for the **Samaritans**



CLIENT PROFILE

SAMARITANS

Samaritans handled the majority of its Direct Debit donation processing in-house. The charity was already using Access thankQ, The Access Group's charity fundraising CRM system and, seeking to free up more time for its database team and improve efficiencies, it decided to take on Access PaySuite's Direct Debit Managed Service. This integrates with Access thankQ, enabling users to manage both existing and new supporter Direct Debit payments through the CRM system rather than having to log onto multiple systems.

THE CHALLENGE

Samaritans has been on the end of the phone for anyone needing support for 65 years and its 20,000-strong volunteer base responds to a call for help every seven seconds. In the first six months of the pandemic alone in 2020 it supported people over 1.2m times. And, with every call it answers costing the charity £5, its regular giving supporters are critical to keeping its services going around the clock.

Previously, Samaritans had always processed Direct Debit donations in-house with the exception of its online Direct Debits.

Making the leap from in-house to external provider

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Given the tight timelines, it was critical that we work closely with the supporter care team at Samaritans to hit the live date. We created a project plan straight away and set up regular calls with all involved to keep the project on track. Communication between all parties was great, and a key factor in delivering everything on time.

Laura Wilson - Customer Success Manager, Access PaySuite

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Seeing that many other charities outsourced all of their Direct Debit donation processing, Samaritans wanted to take some of the pressure off the Database team by doing the same.

The charity was already using Access thankQ, and wanted to explore Access PaySuite's Direct Debit Managed Service which offered an API integration. Samaritan's supporter care manager, Joe Campbell, had worked with the Access PaySuite team in a previous role and knew them to be very reliable.

Following a tender process, Samaritans took the decision to streamline its processes by moving its Direct Debits over to Access PaySuite. In addition to freeing up the team's time to focus on other priorities, the service also offered the Control my Payment module, which enables supporters to take a payment holiday or skip a payment as an alternative to a straight cancellation.

Another benefit was the level of analytics and reporting Access PaySuite was able to provide. And, of course, the integration with the charity's existing CRM system, making it easier for the team to keep an eye on donations, as all the data would automatically feed into it.

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While it is early days, having worked with Access PaySuite before I know they are very reliable and any issues are resolved quickly. They're a supplier you never have a problem with.

Joe Campbell - Supporter Care Manager, Samaritans

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Successful and seamless onboarding

Samaritans had never used an external provider for its payment processing before, so Access PaySuite project managed the transfer, giving peace of mind that everything was in safe hands, whilst freeing them up to continue with their work.

This also proved critical when 2020 brought a new urgency to moving over. With the first lockdown came, the need for everyone to work from home made managing Direct Debits in-house more challenging.

Originally the transfer and set up had been expected to take 4-6 weeks, but with the pressure on, the process was fast-tracked to ensure a quick transfer of Direct Debits and subsequent integration between Direct Debits and Access thankQ.

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The speed at which we were able to get up and running was a real lifesaver for us.

Joe Campbell - Supporter Care Manager, Samaritans

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RESULTS

While the onboarding process only took place in November 2020, within a few months the changes have already resulted in significant time and efficiency savings for the charity.

Samaritans no longer has to worry about managing new and existing Direct Debit payments, and the team is now able to reallocate valuable time to other tasks.

Access PaySuite's Direct Debit Managed Service also gives them peace of mind by automating the whole process, including the integration of payments data with their CRM system, so reducing the risk of error from manual input, and reducing some of the pressures caused by the pandemic's impact on working practices.

Reporting capabilities have also improved, and important tasks that used to be lengthy and onerous – such as managing Gift Aid declaration forms, as well as uploading and downloading data files – now happen almost instantaneously.

“Being able to integrate directly with Access thankQ and have the data go back and forth automatically was a big bonus for my team – in supporter care, Direct Debit care is a really important element for us. And we know too that Access PaySuite can help with more, such as the supporter journey, which is something our team is keen to develop

Joe Campbell - Supporter Care Manager, Samaritans



About Access PaySuite

Access PaySuite is a leading provider of payment solutions to mid-sized UK organisations. Part of The Access Group, it combines payments expertise with unparalleled SaaS experience to help thousands of customers across commercial and not for profit sectors improve their payment solutions, providing the freedom for businesses to accelerate their innovation and growth.

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