

Charity reduces admin by 60% using Act!

Since 2005, Yalari has been providing Indigenous children with full scholarships for their entire secondary school education. Strong and productive partnerships with 28 of Australia's leading boarding schools are a cornerstone of their success.



The Challenge

Prior to implementing Act!, Yalari were using multiple Excel spreadsheets to track their clients and other business contacts. Yalari needed a singular centralised database solution to improve communication and productivity.

The Solution

Yalari had a taskforce assess a number of CRM solution to ascertain which product would be suit their needs and budget. They found Act! to be the simplest and most practical system for what they required. "What sold me on this system was its simplicity and the practical solution it provided our business", Yalari CEO, Scott Young explains.

"We now have a centralised database where we conduct multiple business activities. Previously to look up the history of our clients, sponsors and volunteers we would have to view several spreadsheets. Now we can view the complete record and financial history with ease".

The Results

Customising Act! with help from our Act Today consultant has provided enormous efficiencies within Yalari. “We customised Act! specific to our unique business requirements which addressed the complexity of all our Excel spreadsheets. We can now add our own fields and create categories that are unique to us. This system is easy and flexible.”

Yalari now have streamlined business processes including mail outs, mass emails and record look-ups across multiple fields. “Whenever we had an event, the mail merging created so many problems because of the multiple spreadsheets we were using.”

“I use Act! everyday. It has easily reduced my administrative work by up to 60%. This system has assisted in the management of our business right across the board. Financially, it is linked to our accounting software. This gives us a comprehensive view of our clients. History is critical to us as well and we can now view this with ease. We also have access to ongoing training through our consultant which has been a great help.”

Improvement Highlights

- ✓ 60% reduction in administration
- ✓ Integration with accounting system
- ✓ Improved business management
- ✓ Advanced lookups of contacts
- ✓ In-house emarketing
- ✓ Targeted marketing campaigns

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Scott Young, CEO, Yalari



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