

# thankQ



## thankQ feedback & Advice

The development of thankQ is driven by our own ideas, new technologies and by listening to and working closely with new and existing customers. Two modules - **Feedback** and **Advice** - have both been developed in this way, to capture different types of communication with supporters and the public.

The **Feedback** module was developed in partnership with **Bible Society** after they identified how thankQ could help them meet one of the good governance requirements laid down by the Charity Commission - to manage complaints and customer feedback.



The feedback module seamlessly integrates with the existing CRM functionality, but in recognition that the feedback may sometimes be about the users of thankQ, it carefully controls which users can see which information:

- uses same contact database
- feedback items appears in Communication history
- restricted access to detail
- secure reporting options

### linked but secure

The key to good CRM is making sure that everybody in your organisation appears fully informed when dealing with your supporters. If someone has made a complaint, the last thing you can afford is for a well-meaning fundraiser to bother them with appeal information.

Equally, if that complaint was about one of those well-meaning fundraisers, you need to remember your responsibilities as an employer - to investigate and follow up the enquiry correctly. So they or their colleagues should not be able to read or edit the complaint.

The contact form will show that a complaint has been received from that contact, but will not show any information about the nature of the complaint, unless the user has the necessary permission to view the record.

The thankQ **Advice** module is aimed at organisations that provide support or advice to their supporters and members of the public through a help desk service. In its standard form, the module is a simple tool that can help:



- classify and monitor types of enquiries
- identify recurrent issues
- identify if advice has been given anonymously or to a known contact

The module was developed in partnership with **TaxAid** which is a UK charity providing free tax advice to individuals who cannot afford to pay for a professional adviser. In addition to providing a wealth of information on its website its advisers handle enquiries received by both email and over the telephone.

### anonymous information

The key to providing an advice or helpline service - particularly where information relates to financial or medical **Advice**

Case ID	ADVX0002	Date Contacted	11-Feb-2009
Advisor	George	Status	Approved
Case Level	High	Location	North East
Total Time Spent	10		
Contact Details   Problem Details   Advice History   Communication   Actions   Control   Table View			
Problem		Notes	
Data Protection Query		Retention of records - how long	
Key References		Reference Type	Notes
		Website	<a href="http://www.hmrc.gov.uk/ct/keeping-records/keeping.htm">http://www.hmrc.gov.uk/ct/keeping-records/keeping.htm</a>

issues - is the ability to capture information and give advice anonymously. If appropriate, the user can go back at a later date and link it back to a known contact record and other case notes.

Regardless of the anonymity of calls, the module provides performance monitoring, by team or by individual, and allows consistent classification of the advice being provided.