

A Funding Bid Guide for the Charitylog CRM

Purpose of this document

If your charity needs to apply for funding to buy the Charitylog CRM, this guide offers advice on what to include in your application. It will help you explain why the software is needed, how it will improve your work and why Charitylog is a responsible, trustworthy provider.

Contents

1. [What is a CRM?](#)
2. [Explaining the benefits of a CRM](#)
3. [Explaining why Charitylog is your preferred CRM](#)
4. [Frequently Asked Questions to cover in the bid](#)
5. [Further information about Charitylog](#)

What is a CRM?

In a voluntary sector context, a CRM (client relationship management) system is a software tool for case management and service delivery. It helps the charity keep track of the different types of people it works with – like clients, donors, volunteers and partners – and all the work it does with them. Instead of information being stored in various places, like spreadsheets, emails and files, a CRM pulls it all together into a central database so staff can access everything in one place.

Explaining the benefits of a CRM

If you already use a CRM and plan to switch to Charitylog, jump to the next section.

By bringing beneficiary, programme, volunteer and partnership information into a single system, a CRM creates a reliable “single source of truth”. This allows leaders and managers to move away from anecdotal evidence or fragmented spreadsheets and instead base decisions on clear trends and patterns – like service demand, geographic coverage, outcomes achieved and staff or volunteer capacity. Over time, this supports better strategic planning, more responsive service delivery and stronger accountability to trustees, regulators and partners.

Key points

- ✓ **Efficiency and timesaving:** A CRM will help save time across the board, from reducing repetitive admin tasks to being able to generate detailed, evidence-based reports at the touch of a button. This means staff can focus more on supporting people rather than chasing information – so we are using our time and budget more effectively.
- ✓ **Centralised data:** Currently, our data and processes are fragmented across spreadsheets, email threads and disparate systems, leading to inefficiencies, duplicated effort and increased risk of data error. A CRM will replace disconnected spreadsheets and emails and ensure that all people, cases, referrals and activity history are stored in one secure system.
- ✓ **Better reporting and evidence:** A CRM will generate professional, accurate, detailed reports for trustees, funders and commissioners.
- ✓ **Data security and GDPR compliance:** A reliable CRM protects sensitive information and stores it securely. This avoids risky mistakes and confusion caused by fragmented spreadsheets, emails, and paper records.
- ✓ **Improved service delivery:** A CRM supports consistent handling of enquiries, tracking of cases and referrals, timely follow-ups and monitoring of outcomes.
- ✓ **Better decision-making:** A modern CRM system would significantly enhance organisational decision-making by providing *accurate, timely, and joined-up data* across services and operations.

Include examples of current challenges – like duplicated work or delayed reporting – to show why the CRM will make a measurable difference.

Explaining why Charitylog is your preferred CRM

Charitylog is a responsible and budget-conscious choice, because:

- ✓ It's designed specifically for charities, with in-built tools relevant to their day-to-day needs.
- ✓ It's tried and tested: Charitylog has been around (and continually developing!) for 20 years. Tens of thousands of people at over a thousand UK charities log into Charitylog every day.
- ✓ It's cost-effective: pricing is proportional to income, with different price plans to suit most budgets. Standard plans include unlimited user licences. No hidden costs, no surprises.
- ✓ It's flexible, adaptable and scalable: it can grow or reduce as your charity's needs change.
- ✓ It has highly regarded user support: All Charitylog plans now include unlimited, UK-based customer support from a dedicated in-house team. There's also structured onboarding, tailored training, online manuals for each page of the system, how-to videos and more. On most plans you'll have a free follow-up training session once you've used the system for a few weeks, and you can choose to buy additional training or in-depth review sessions if you need them.
- ✓ It keeps developing and improving: There are 3 significant software updates every year, clearly communicated in advance.
- ✓ It's secure: Charitylog is cloud-based. It's ISO 27001- and Cyber Essentials Plus- certified. UK-based hosting ensures legal compliance. It offers user access controls and built-in GDPR compliance tools.
- ✓ It's excellent for impact measurement and KPI reporting: Charitylog can handle multiple impact measurement tools. It offers a comprehensive range of easy-to-use reports and a large suite of key performance indicators to handle complex reporting requirements.
- ✓ It's ethical, accountable, and sustainable: Charitylog has a detailed ethical statement including a list of principles, such as fair treatment of staff, a supportive workplace, transparency with customers and more. It uses renewable energy hosting, supports hybrid working and minimises environmental impact. Many staff have charity experience and engage in voluntary work, reflecting a deep commitment to the sector.

When writing your bid, it's worth emphasising that Charitylog is not only effective software but also an ethical, accountable partner with a genuine commitment to the voluntary sector that will help your charity manage sensitive information safely and responsibly.

Frequently Asked Questions to cover in the bid

Q: How will Charitylog be put in place and how will staff learn to use it?

Charitylog provides structured support to help people get started. There is onboarding guidance, online manuals and video guides for every part of the system. Tailored training sessions are available for staff, and their highly regarded UK-based in-house support team is available to answer questions and help solve problems as they arise. Note that standard Charitylog plans include *unlimited* access to customer support, unlike some other providers.

Q: How does Charitylog help us meet GDPR and protect personal data?

Charitylog has built-in features that help organisations follow data protection laws like GDPR. You can set role-based access, so staff only see what they need for their role. All data is securely stored in the UK, and the system supports strong controls to keep personal and sensitive data safe.

Q: What security standards does Charitylog meet?

Charitylog meets recognised standards for information security. It holds certifications such as ISO 27001 and Cyber Essentials Plus, which show that the system is independently assessed against strong security controls. These are audited every year to maintain high confidence in data protection.

Q: Where is the data stored and how reliable is the service?

Charitylog is hosted on cloud infrastructure that is designed for safety and reliability. Data stays in the UK, which helps legal compliance and keeps data subject to UK data protection standards. Charitylog uses AWS, considered a very reliable server provider due to its robust infrastructure design, built-in redundancy and extensive security features. Charitylog is regularly updated and maintained as part of the subscription, reducing downtime and ensuring the system remains secure.

Further information about Charitylog

Visit www.charitylog.co.uk for recent user testimonials, case studies, details about our price plans, features and extras, full list of FAQs and more.

Here are some quick links:

- [Charitylog, An Overview \(video short\)](#)
- [Accreditations and certificates](#)
- [How Charitylog Measures Up as an Ethical Company](#)
- [Full list of Frequently Asked Questions](#)
- [Plans and pricing](#)
- [Case studies and testimonials](#)

Contact details

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