



## Due Diligence Synopsis: Beacon Apps Ltd for IWAI Membership Coordination

Status	Date	Author
Issue one - Draft	20 <sup>th</sup> November 23	Matthew Daniels
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## 1 Executive Summary

Subject to this due diligence report the BeaconCRM membership project was authorised and endorsed for continuation at IWAI Council meeting held in Belterbert by the IWAI Executive on 21st October 2023. Details of the decision are listed in 7.1 of the Council meeting minutes document.

This document is a working instrument to furnish the requisite governance and frameworks for successfully implementing a state-of-the-art CRM system to manage the Inland Waterways Association of Ireland (IWAI) membership. This report aims to scrutinise BeaconCRM as the proposed client service provider and establish the coordination efforts required to implement a new CRM system for IWAI and its members.

Issue one of this report suggest that BeaconCRM is a fit-for-purpose service provider for IWAI.

Issue two of this report is due to feedback from Haley Medlock, the Cotswolds Dogs and Cats Home Charity, UK. This inclusion is presented in Section 3.3.2 and reinforces the findings that BeaconCRM is a fit-for-purpose service provider for IWAI.

### 1.1 Report Objectives

This Section of the document represents the initiation phase of the project, wherein the IWAI is contemplating a potential partnership with BeaconCRM. The purpose of this Section is to furnish an overview of the initiation and propose a framework for partnership with BeaconCRM. It aims to examine the following attributes to ascertain their suitability:

- **CRM System Appraisal:** Scrutinise Beacon Apps Ltd.'s CRM system's functionalities, expandability, and ease of use to confirm that it satisfies IWAI's precise requirements for managing memberships. This is outlined in Section 3.
- **Corporate Standing:** Investigate client endorsements and sector appraisals concerning the CRM's efficacy. This is outlined in Section 3.3.
- **Financial Robustness:** Review Beacon Apps Ltd.'s fiscal solidity to ensure a durable partnership with IWAI. This is outlined in Section 3.9.

**See sections 3.4 and 3.5 regarding the remaining points for consideration.**

- **Regulatory Adherence and Security:** Ascertain compliance with data protection regulations and the robustness of cybersecurity provisions within their CRM.
- **System Integration:** Gauge the compatibility of the CRM system with IWAI's existing infrastructures and data management protocols.
- **Customer Support and System Upkeep:** Evaluate the quality of client service and ongoing maintenance offered by Beacon Apps Ltd.
- **Cost Efficiency:** Analyse the overall expenditure for the CRM, including licensing, customisation, and ongoing support.
- **Cultural Congruence:** Ensure Beacon Apps Ltd.'s business conduct and customer service principles align with IWAI's ethos.

## 2 Project Team

This Section describes the project team's key elements and provides a comprehensive understanding of the team's composition, roles, capabilities, and dynamics. The team is a subcommittee of the IWAI executive tasked with overseeing and governing a proposed new CRM system. Table 1 provides the Contact information, Organisation and Role of current team members.

Table 1: CRM Sub Committee Team

Name and Contact Email	Organisation	Role
Kay Baxter - <a href="mailto:kay_baxter@hsa.ie">kay_baxter@hsa.ie</a>	IWAI	President
Colman Byrbe - <a href="mailto:colmansbyrne@gmail.com">colmansbyrne@gmail.com</a>	IWAI	Technical Lead
Steve Kitt - <a href="mailto:stevekittplus@gmail.com">stevekittplus@gmail.com</a>	IWAI	Technical Lead
Brid Joy - <a href="mailto:brid2joly@gmail.com">brid2joly@gmail.com</a>	IWAI	Membership Secretary
Colin Becker - <a href="mailto:colin_becker@iwai.ie">colin_becker@iwai.ie</a>	IWAI	Advisor
Matthew Daniels - <a href="mailto:Matthew.daniels@ul.ie">Matthew.daniels@ul.ie</a>	IWAI	Technical Advisor
Alison Maddock - <a href="mailto:Treasureriwai@gmail.com">Treasureriwai@gmail.com</a>	IWAI	Treasurer
Alexa Tucker - <a href="mailto:alexa@beaconcrm.org">alexa@beaconcrm.org</a>	Beacon Apps Ltd	Customer Development Manager

Internal email list: [kay\\_baxter@hsa.ie](mailto:kay_baxter@hsa.ie); [colmansbyrne@gmail.com](mailto:colmansbyrne@gmail.com); [stevekittplus@gmail.com](mailto:stevekittplus@gmail.com); [brid2joly@gmail.com](mailto:brid2joly@gmail.com); [Matthew.daniels@ul.ie](mailto:Matthew.daniels@ul.ie); [Treasureriwai@gmail.com](mailto:Treasureriwai@gmail.com); [colin\\_becker@iwai.ie](mailto:colin_becker@iwai.ie);

The team communicates via email, in-person, phone, and online meetings. It communicates to the executive committee through regular monthly meetings.

### 3 Beacon Apps Ltd Appraisal

<https://www.beaconcrm.org/about>

BeaconCRM, trading as Beacon Apps Ltd, is a software company that provides customer relationship management (CRM) software services exclusively catered to charitable organisations.

Customer Relationship Management (CRM) software is designed to assist organisations in managing their interactions with current and prospective customers. Key functions include:

1. Data Centralisation: CRM software consolidates customer information into a single database, enabling straightforward access to client details such as contact information, purchase history, and past interactions across the organisation.
2. Tracking Customer Interactions: It records every customer engagement, encompassing emails, phone calls, and meetings, making this information accessible to anyone in the organisation who might require it.
3. Sales Management: The software aids in managing the sales process from lead generation to the closing of sales and can include features for forecasting and performance tracking.
4. Marketing Integration: Many CRMs integrate with marketing tools, facilitating seamless campaign management, targeted customer outreach, and monitoring the effectiveness of marketing efforts.
5. Enhancing Customer Service: By providing detailed customer histories, CRMs enable more personalised and efficient customer service, improving client satisfaction and loyalty.
6. Analytics and Reporting: Advanced CRMs offer tools to analyse customer data, helping businesses understand customer preferences, predict trends, and make informed decisions.
7. Task Automation: Routine tasks, such as sending follow-up emails or updating records, can be automated, increasing efficiency and reducing the chance of human error.

8. Improved Communication: CRM can serve as a communication hub, enhancing internal communication and organisational coordination regarding customer-related activities.

### 3.1 IWAI Project Objectives & Requirements

Adopting Customer Relationship Management (CRM) software by IWAI significantly advances managing memberships, rallies, and various special interest groups. This development is crucial for several reasons:

1. Segmented Communication: CRM enables the segmentation of members into different groups based on age, interests, or branch affiliation, allowing IWAI to tailor communications and marketing efforts specifically to relevant subsets of members.
2. Event Management: The software facilitates the management and promotion of events such as rallies, cruises, safety training, and other educational events, simplifying event creation, registration, and follow-up processes.
3. Membership Management: CRM provides a central system for managing member information, subscription renewals, and other membership-related tasks, ensuring efficient and accurate record-keeping.
4. Targeted Outreach: Utilising the data within the CRM, IWAI can create targeted campaigns to attract new members or engage existing ones in activities like volunteering for rallies or participating in special interest groups.
5. Integration of Technologies: With different branches and groups potentially utilising varied technologies, a CRM system can act as a unifying platform, ensuring compatibility and ease of information flow across different technological environments.
6. Enhancing Safety and Training Programmes: CRM can track members' participation in safety and training programmes, aiding in better planning and executing these crucial initiatives.
7. Feedback and Improvement: The software enables IWAI to collect and analyse feedback from members on events, rallies, and other activities, which can be used to refine future planning and execution.
8. Resource Allocation: Understanding the preferences and activities of different member segments through CRM data allows for more effective resource allocation, ensuring that resources are directed towards the most impactful initiatives.
9. Increased Engagement: A well-implemented CRM system enhances member engagement by providing more relevant and timely information, improving their overall experience.
10. Efficiency and Productivity: Automating routine tasks and centralising data management increases efficiency and productivity, enabling IWAI staff and volunteers to focus on more strategic initiatives.

In summary, implementing a CRM system is a vital step for IWAI in enhancing its capability to manage the diverse needs of its members, streamline operations, and provide targeted and effective services to its different groups and branches. This will ultimately lead to a more engaged membership and a stronger community surrounding Ireland's inland waterways.

### 3.2 Post Implementation

In implementing BeaconCRM's software for the IWAI, viewing this as an ongoing process rather than a one-time event is essential. A critical component of this process is the need for regular testing and evaluation, particularly within the initial three months post-implementation. Here is why this is essential:

1. **Initial Adjustment Period:** The first three months serve as an adjustment period. IWAI staff and members will adapt to the new system during this time. Regular testing ensures that any issues encountered during this learning curve are identified and addressed promptly.
2. **Identifying Technical Issues:** Early-stage testing can uncover technical glitches or compatibility issues that might not have been apparent during the planning and implementation phases. Addressing these issues early prevents them from becoming more significant problems.
3. **Feedback Gathering:** This period is critical for gathering feedback from users, both staff and members. Understanding their experiences with the system, what works well and what does not, is invaluable for making necessary adjustments.
4. **Customisation and Fine-Tuning:** Based on initial feedback and testing results, the CRM system may require customisation or fine-tuning to fit IWAI's specific needs better. Early testing helps identify these areas for improvement.
5. **Training and Support Evaluation:** The first few months are also an excellent time to evaluate the effectiveness of the training provided to users and the support from BeaconCRM. Adjustments to training or support structures can be made based on this evaluation.
6. **Performance Benchmarking:** Testing in the initial phase allows for setting performance benchmarks. These benchmarks will be crucial in measuring the system's effectiveness and ROI in the longer term.
7. **Data Integrity and Security Checks:** Regular checks during the initial months ensure that the system handles data securely and maintains its integrity, which is especially crucial for IWAI's sensitive member data.
8. **Preparation for Scalability:** Early testing can provide insights into how well the CRM system can scale with the organisation. As IWAI grows or its needs change, the system should be able to accommodate this growth.
9. **Building User Confidence:** Successful testing and quick resolution of any issues help build user confidence, which is crucial for the long-term adoption and success of the system.
10. **Establishing a Continuous Improvement Culture:** Introducing regular testing sets a precedent for ongoing evaluation and continuous improvement, fostering a culture of adaptability and proactive problem-solving within IWAI.

In conclusion, implementing BeaconCRM's system as an ongoing process with a strong focus on testing and evaluation, particularly in the initial three months, is essential for ensuring the system effectively meets IWAI's needs and supports its mission.

### 3.3 Reputation and Reviews

See section 3.6 for online reviews.

Endorsements on the BeaconCRM website: <https://www.beaconcrm.org/solution/animal-rescue-charities>

- Ruth Simpson @ Goodheart
- Joe Meehan @ New Hope
- Gillian Graham @ Edinburgh Dog & Cat Home
- Kevin Hughes @ Special Olympics Ireland

Clients listed in Table 2 and cited on the BeaconCRM website have been independently contacted via email to endorse the company and provide feedback. The email message sent to listed clients is provided below the listings. To date, one client from the list has responded, which is provided in Section 3.3.1.

*Table 2: Client Contacts for Endorsements*

Client	Contact information
RSPCA	press@rspca.org.uk
Dogstar Foundation	info@dogstarfoundation.com
Cotswolds Dogs and Cats home	info@cdch.org.uk
<b>Safehaven for Donkeys</b>	info@safehaven4donkeys.org

Dear [Client Name],

I hope this email finds you well.

I am writing to you in your capacity as a valued client of Beacon Apps Ltd. We are currently considering a partnership with Beacon Apps Ltd. to implement their BeaconCRM system, which we believe could significantly enhance our membership management processes at the Inland Waterways Association of Ireland (IWAI).

Given your extensive experience with BeaconCRM, we would greatly appreciate your insights into the system's performance and the quality of service Beacon Apps Ltd provides. Your endorsement and any constructive feedback would immensely benefit us in making an informed decision.

- We are particularly interested in understanding your experiences in the following areas:
- The adaptability of BeaconCRM to your organisation's needs.
- The effectiveness of BeaconCRM in managing client relationships and data.
- The responsiveness and support provided by Beacon Apps Ltd.
- Any specific benefits you have noticed since implementing BeaconCRM.
- Constructive criticisms that you believe could help us in our decision-making process.

Your feedback is invaluable to us, and we assure you that it will be taken into consideration with the utmost respect for your confidentiality and business interests.

Please feel free to share your thoughts in writing at your convenience.

Thank you in advance for your time and assistance. We look forward to your valuable input.

Warm regards,

Dr Matthew Daniels

Inland Waterways Association of Ireland (IWAI)

Matthew.Danels@ul.ie

### 3.3.1 Reply from Safehaven for Donkeys

*Dear Matthew (if I may),*

*Thank you for your Email regarding Beacon.*

*We have now been with Beacon for over 3 years, having previously had a bespoke database in SQL, which we decided was no longer suitable for our needs.*

*Since the beginning, we have been very pleased with the responsiveness and support provided by them if we have any queries/difficulties. We can send them an instant message and they usually reply within a few minutes and even if they can't sort the query immediately, they will keep going until they have.*

*One of the reasons we chose Beacon was its adaptability. As well as donations, as a donkey charity we have a donkey sponsorship scheme and we also sell merchandise and Beacon was able to be customised to deal with all these (we paid Beacon to do the set-up for us). It does everything we need and is very flexible.*

*Beacon is very effective at managing our relationships and data – we can see everything at a glance, we can see what actions have been carried out regarding individual people/organisations and what actions we need to carry out. We use it to manage tasks and relationships and it works very well for us.*

*One of the main benefits we have noticed is the ability to segment data, this has allowed us to tailor communications to those who have given at different levels which has enabled us to raise significantly more.*

*Overall, we are very happy with Beacon and honestly cannot think of any constructive criticism to give as it is perfect for our needs.*

*If you have any other questions, please do not hesitate to contact me.*

*Kindest regards,*

*Wendy*

### 3.3.2 Reply from Cotswolds Cats and Dogs Home

**Correspondance received 30<sup>th</sup> November 2023.**



Hi Matthew

No problem at all.

We changed CRM systems to Beacon in 2020, and have never looked back! It is a valuable element of our fundraising department.

When reviewing other options, these were the factors that stood out for me:

- Ease of customisation
- Fantastic customer support
- Price, not sure what it is like price-wise now, but back when I did the review, it was very good compared to others.

In answer to your questions, please see below:

- *The adaptability of BeaconCRM to your organisation's needs.*  
*Beacon supported us through the set up, to ensure it covered all aspects that we needed it to. I have adapted it since, to include many other functions. The ease of the system makes it possible to do this. For example, you can link supporters to adopted animals, other people/ relationships, etc. I can also clearly see who donates to what, why they donate and a bit of a picture of who they are.*
- *The effectiveness of BeaconCRM in managing client relationships and data.*  
*You can set up pipelines for grants and corporates – this makes it really easy to stay on top of applications and reporting. I have also set up a 'tick box' when donors are thanked and a filter to show those that aren't. This is done in bulk. Mailchimp is also migrated and you can see what emails are sent within the log of a persons record.*
- *The responsiveness and support provided by Beacon Apps Ltd.*  
*Support is outstanding. They have a chat box which usually you will hear back in several minutes. Whilst onboarding, I had several video calls to for training and development. We also looked into having out perfect match forms for adoption though Beacon. The support and advice they provided was great.*
- *Any specific benefits you have noticed since implementing BeaconCRM.*  
*Donor stewardship. Learning trends on giving, allowing us to direct market.*
- *Constructive criticisms that you believe could help us in our decision-making process.*  
*Nothing bad to say about Beacon, only that I wish they offered a fundraising platform, similar to JustGiving or Enthuse. As I have problems with both (mostly donor data) and would love for Beacon to add this to their platform. I have discussed this with them and they said its something they would like to offer and is in review for future.*

*Another thing to keep in mind, you can embed the donation form onto your website, so donors don't have to leave your site to make a donation. If you do this, donors cant donate with apple pay. We used to direct people off our website to the beacon site to donate, where they can use apple pay. As we didn't have many people using apple pay, this wasn't a huge issue for us, but something to keep in mind. I think this might be a similar problem with other platforms and embedding donate pages within your site.*

*Hope this is helpful, if I could advise charities to do one thing, it would be to look after your donor data and use it to grow – Beacon is a great tool for this.*

*For info, we used Harlequin prior.*

*Please do let me know if you would like any more info.*

*Many thanks*

*Haley Medlock*

*Fundraising Manager*

*The Cotswolds Dogs & Cats Home*

*Tel: 01453 890014*

*Email: [haley.medlock@cdch.org.uk](mailto:haley.medlock@cdch.org.uk)*

### 3.4 Meetings with BeaconCRM

A meeting was held between Matthew Daniels (IWAI) and Alexa Tucker (BeaconCRM) on 23rd November 2023. The meeting was followed by an email confirming and clarifying the meeting discussion.

#### **Response:**

Hi Matthew,

Great to chat with you earlier! I'll put my answers below in bold.

**Contract Flexibility and Termination:** "Could you please clarify whether the monthly subscription to your CRM software commits IWAI to a long-term contract? Specifically, is there an option for IWAI to terminate the subscription without substantial penalties if the software fails to meet our specific requirements?"

**Beacon's monthly pricing doesn't commit you to an annual contraction. If IWAI sadly wanted to leave Beacon while on the monthly plan, you'd simply cancel the subscription without incurring any additional fees. If you had already paid for that month, you would not receive a refund. You can read more about how Beacon's billing works in our [Fair Billing Policy](#).**

**Integration with Online Services and Member Verification:** "Does your CRM system support integration with external online services, such as navigation tools and real-time information platforms? Moreover, can it automatically verify active memberships to regulate access to these services?"

**This would be something custom done with Beacon's API. As we discussed on the call, you could use the API to retrieve data (e.g. if someone is an active member or lapsed member). Custom API work is not included in the scope of our Beacon implementation quotes (attached). If you'd like to be matched with a Beacon partner who could give you an estimate for what this would cost, I can do that.**

**Data Ownership and Portability:** "In the event that IWAI develops a specific schema to work with BeaconCRM, would the ownership of this schema remain with IWAI? Additionally, is there a provision for easily transferring this schema to other CRM vendors if necessary?"

**If IWAI decided to leave Beacon and wanted to export their data out of Beacon into**

a csv file to take to another platform, it's very easy to do so with just a few clicks. You can read more about exporting [here](#).

**Custom Query Functionality for Targeted Communication:** "How adaptable is your CRM in terms of running customised queries? In particular, can it segregate data based on branch member profiles to facilitate targeted communication for training needs and special events?"

**Filtering records within Beacon is very easy to do. You can filter People records based on their related branch and membership data. These filtered views can be used for targeted communications. You can read more about filtering [here](#).**

**Handling Diverse Payment Options:** "Apart from membership fees, IWAI organises various events requiring separate payment collections. Can your CRM handle multiple types of payments and schedules, and how does it manage these diverse financial transactions?"

**The payments record type in Beacon shows the payments coming into your database from all sources, whether they be donations, memberships, recurring payments, ticket sales, grants, or from any other place that your organisation takes payments.**

**Payment records reflect a transaction, such as a £50 cash donation or the April payment of a recurring membership, and can store a wealth of information. From basics like amount, relevant dates, payment method, to other related records such as which fund it contributes to, the campaign that helped raise the money, relevant grants, memberships, the related subscription, and even the event that a payment was taken at.**

**Beacon forms can also be used for membership payments, event registration payments, and donations.**

**GDPR Compliance and Data Management:** "Does your CRM platform offer the option to automatically delete data of lapsed members in accordance with GDPR regulations? How does the system ensure compliance with these data protection standards?"

**Beacon does not automatically delete lapsed members. You can use filtered views to show all people who are lapsed over a specific timeframe and then periodically delete them in bulk.**

**You can read more about our commitment to GDPR and security on our [Trust](#) page and [Privacy for Humans](#) page.**

You mentioned Gift Aid as something that may interest us concerning our Northern Ireland branches. Could you elaborate on this?

**I am not a Gift Aid legal expert, so it's best to check with your team to see if this would be applicable to IWAI. UK charities can claim back 25p on every £1 donated when the donor has made a Gift Aid declaration. There's also the [Small Donation Scheme](#) where you can claim it on things like collection tins. I suggest checking out the [Charity Commission's website](#) and asking around about it. It can make a huge difference. There's been several times we've seen charities pay for their first full year of Beacon just from finding Gift Aid eligible payments to claim on with Beacon's Gift Aid features. [Here's a case study of one](#). When a donor makes a Gift**

**Aid declaration, typically their past 4 years of donations are eligible to be claimed on. It can add up quite quickly.**

I'll send over a separate email shortly that outlines next steps, T&Cs, support, and project info.

Let me know if I can answer anything else for you! It's been great working with Steve, Coleman, and the team.

Kind regards,  
Alexa

### 3.5 Next Steps

Hi Matthew,

It's great that you'd like to move forward with Beacon! Please find below the next steps and action required to get you booked in and introduced to an implementation partner. As I mentioned earlier in our call today, the current lead time for a project is **4 weeks** from signing up to Beacon.

- 1. Beacon sign up** - this needs to be done now in order to get you booked in ([click here to set up](#))
- 2. Partner allocation** - I will loop you in with your aligned partner, who will arrange with you a suitable date for kick off
- 3. Kick off call** - your partner will be leading this, and it's where the fun begins!
- 4. Payment to partner** - after the kick off call, your partner will invoice you for the full upfront cost of the project
- 5. Project ahead!** - your partner will map out the key next steps and milestones, and we'll be here to check in along the way too.
- 6. Beacon customer success** - your CSM will also be in touch, so that you always have a direct contact at Beacon.

#### **Your project plan**

Please find attached the options for your implementation plans. Once you've chosen the plan IWAI would like to go with (Advisory, Assisted, or Managed), let me know. Projects of this size typically range **18 to 22 weeks**.

#### **Beacon billing**

In order to accept the terms and get moving, all you need to do is log into your Beacon account and go to Settings > Billing where you can select:

- Your product plan, elements you require and your contact limit

- Your billing frequency and method (annual or monthly)
- Your billing start date, which can be up to 4 weeks in the future if you don't need access right away

This is also where you'll accept the Beacon [terms](#).  
[Here](#) is a link to your quote if you need a refresher.

### Support

Any of your users can reach out to Beacon's in house support team during business hours via [email](#) or in-app chat. They have a response time of less than 10 minutes for any query you have. We invest a lot of time into ensuring that our user [guides](#) are up to date as the product evolves. We also host an online [eLearning platform](#), to help train up new users and admins. And we regularly hold [online and in-person events](#) for all charities. This could be something like a new feature update or a clinic to deep dive into something specific.

Let me know if you have any questions/concerns with the above!

Best wishes,

Alexa

### 3.6 Track Record and History

Investigate the company's history. A long-standing company with consistent service or product quality is generally more trustworthy. Look for any significant past complaints, legal issues, or scandals.

Searches using AI:

*I have not been able to find specific information regarding significant past complaints, legal issues, or scandals associated with BeaconCRM. The search results did not reveal relevant details or credible sources that specifically address your inquiry about BeaconCRM. If you have any other questions or need assistance with a different topic, feel free to ask!*

XXXXX

*BeaconCRM has garnered several favourable reviews from various sources:*

*Trustpilot Review: A user's feedback from 21st August 2023 commends Beacon for its helpful staff who promptly respond to enquiries, guiding users effectively. The reviewer expects to derive greater benefit from the CRM as they enhance their data input and proficiency.*

*Capterra UK Reviews: On Capterra UK, BeaconCRM boasts an impressive overall rating of 4.9 out of 5 stars, based on 32 user reviews. It has a high recommendation likelihood of 9.8/10. This rating comprises 28 reviews with a 5.0 score and 4 reviews with a 4.0 score.*

*GetApp UK Review: BeaconCRM receives a rating of 4.9 out of 5 from 32 reviewers on GetApp UK. This cloud-based CRM solution, recommended for small to large charities, is praised for its value for money and user-friendliness.*

*Capterra Reviews (Global): Globally, on Capterra, BeaconCRM has an overall rating of 4.7 out of 5, based on 631 reviews. It scores highly for ease of use, customer service, features, and value for money.*

*Capterra Features Review: BeaconCRM is noted for its top features like Contact Management, Donation Tracking, Campaign Management, and Committee Management, all rated 5.0 out of 5. It also enjoys a 100% recommendation rate based on 32 reviews.*

*These reviews underscore BeaconCRM's robust performance in customer service, ease of use, and its array of features suitable for charitable organisations.*

### 3.7 Transparency and Communication

BeaconCRM emphasises greatly on data security and transparency in its operations:

**Data Security:** At the forefront of BeaconCRM's priorities is the secure handling of user data. This encompasses several security measures:

1. The utilisation of Amazon's AWS infrastructure for robust and dependable service.
2. Entirely UK-based data storage.
3. Continuous monitoring to preclude suspicious access.
4. Private cloud hosting, two-factor authentication, and encryption of sensitive data.
5. Managed sessions and controlled access with detailed roles and permissions.
6. Robust password policies, daily data backups, and secure credit card processing through Stripe.

**Transparency and GDPR Compliance:** Designed to assist with easy GDPR compliance, BeaconCRM aims to build trust with supporters by ensuring data cleanliness and compliance. This aligns with the GDPR's objectives to enhance trust and transparency.

**Audit Logs:** BeaconCRM maintains comprehensive audit logs of all alterations to records, including the identity of the individual making the change. This feature ensures a complete overview of Beacon's usage, reinforcing transparency and accountability in data management.

These aspects underscore BeaconCRM's dedication to upholding high standards of transparency and communication, particularly in terms of data security and adherence to data protection regulations.

### 3.8 Accreditations and Certifications

Company snapshot information and tax compliance certificates can be purchased from <https://find-and-update.company-information.service.gov.uk/company/11097096/more>

### 3.9 Financial Health

**IWAI Treasurer to report here.**

<https://find-and-update.company-information.service.gov.uk/company/11097096>

Registered office address: 11 Kingfisher Business Park, Arthur Street, Redditch, England, B98 8LG

Company status: Active

Beacon Apps Ltd have published accounts every year since 28th August 2019. The company was incorporated on 5th December 2017.

Using published accounts show financial data for Beacon for the years 2021 and 2022. Here is a brief rundown based on the top rows of the dataset:

**Fixed Assets:**

2022: £25,899

2021: £23,720

Current Assets:

2022: £261,201

2021: £154,128.00

**Prepayments and Accrued Income:**

2022: £9,018

2021: £6,500

The provided data shows an increase in fixed assets from 2021 to 2022. Current assets are considerably high in 2022, indicating a healthy liquidity position. The increase in prepayments and accrued income also suggests growth or increased operational activity. However, to provide a comprehensive analysis of Beacon's financial health, further details like liabilities, equity, revenue, and expenses would be needed.

- The increase in fixed assets suggests investment in long-term assets, which could mean expansion or upgrading of facilities or equipment.
- The significant current assets in 2022 indicate strong liquidity, meaning Beacon likely has sufficient short-term assets to cover its short-term liabilities.
- The rise in prepayments and accrued income may reflect an expansion in operational activities or pre-arranged income streams.

### 3.10 Customer Service

Attracts good reviews.

### 3.11 Social Responsibility and Ethics

Concerning social responsibility and ethics, BeaconCRM, primarily focused on the charity sector, upholds several core values:

**Charity Sector Focus:** BeaconCRM was created with the belief that charities should have access to the most modern, innovative, and easy-to-use technology. This focus on charity-focused CRM aligns with their mission to support and enhance the efficiency of charitable organisations.

**Founding Principles and Goals:** Founded in 2017 by Chris and David, BeaconCRM was born out of a need for a more effective CRM in the charity sector. The founders, with their background in technology startups, aimed to transform the conventional, often inefficient charity database solutions into something more user-friendly and supportive, thereby aiding charities to work smarter and make a bigger impact.

**Innovation:** BeaconCRM is committed to continuous innovation, striving to be the best CRM option for ambitious and impactful charities.

**People-Centric Approach:** They place people first, from their in-house team to their network of partners and customers.

**Drive for Making a Difference:** BeaconCRM is motivated by the transformative impact their CRM can have on how their customers work.

**Challenge Embracement:** They view challenges as opportunities to help change the world.

**Authenticity and Responsiveness:** BeaconCRM values being upbeat, genuine, and responsive to customer feedback, aiming to constantly improve their CRM for charities.

These aspects showcase BeaconCRM's commitment to social responsibility and ethical practices, focusing on enhancing the effectiveness and impact of charities through their CRM solutions.

### 3.12 Personal Experience and Gut Feeling

The gut feeling is good so far.

### 3.13 Legal Compliance

All seems to be in order.