

Charities Aid Foundation (CAF) is one of Europe's largest charitable foundations. CAF produces research on charities and charitable giving, develops policy ideas and works with people, companies and charities to help good causes thrive.

Over **73,000 charities** supported in more than 100 countries

Over **250,000 individual donors** and 7,300 corporate donors

Over **£4.8 billion** paid to charities since 2000

## THE CHALLENGE

Established over 90 years ago, CAF works with a wide range of organisations and individuals, meaning that its 80 strong customer service team has to respond to emails across a wide range of topics. These can concern corporate Give As You Earn schemes, individuals looking to donate through CAF accounts or charities themselves looking to boost their fundraising.

CAF had two objectives when it came to customer service. It wanted to improve the end-to-end customer experience, delivering a fast, joined-up and knowledge based response to all emails. Secondly, it wanted to maximise efficiency, so that it could pass on the maximum amount of donations to charities by keeping administration costs as low as possible.

All of CAF's interactions were handled through desktop email programs, which was holding the organisation back. "Our existing technology meant that responding to emails was often disjointed and inefficient," said Glen Brooks, Project Manager at Charities Aid Foundation. "We knew we needed to change to transform how we operated."

## THE SOLUTION

After investigating the market, CAF selected Eptica's artificial intelligence-powered customer experience platform.

By adopting Eptica's powerful solution, all incoming emails are now automatically analysed through Natural Language Processing (NLP) technology. They are then sent to an agent, along with the most relevant template-based answer from CAF's growing knowledge base.

By using Eptica, CAF is also able to automatically brand, prioritise and filter emails, allowing them to be sent directly to the most relevant member of staff, thus speeding up response times.

CAF went live with Eptica in June 2017, initially with its customer services team, based in Kent. It is now extending its use to its London office and is looking to make its knowledge base accessible through self-service on its website.

All webforms are being integrated into one, which will come straight into Eptica, further increasing efficiency.



"Eptica was the perfect fit for us. From the start the team demonstrated a deep understanding of our needs and worked with us in an open and transparent partnership to deliver a cost-effective, powerful solution."

Eptica's AI-based technology is proven in the market, and we were able to talk to existing customers to deliver added confidence in our implementation."

Glen Brooks  
Project Manager  
Charities Aid Foundation



Greater end-to-end visibility of all email conversations



Reduced handling time across 7,000 monthly emails

## BENEFITS

### 1 | Deeper understanding

As emails are now handled holistically, CAF has a centralised view of key metrics, such as handling times across entire conversations, enabling it to report and measure more easily against SLAs. It can analyse the different types of queries coming in, providing greater insight into what customers are looking for, allowing it to fill any gaps in the knowledge base.

process in place. Branding and links to satisfaction surveys are now automatically provided in all template-based responses, enabling CAF to start to measure Net Promoter Score.

### 2 | Enhanced productivity

By adopting template-based answers, CAF has been able to increase agent productivity and lower response times. Nearly a third of its 7,000 monthly emails are now answered through templates, and reporting metrics are being used as part of team and agent performance management. Training time has been reduced as new starters can access templates in order to answer queries, ensuring that they are productive earlier.

### 4 | Compliance reassurance

As with every organisation handling customer data, CAF needs to be ready for the May 25 implementation date of the General Data Protection Regulation (GDPR). Thanks to Eptica's design, CAF is able to not only keep data secure, but also demonstrate that its processes are GDPR-compliant.

### 3 | Greater customer focus

Prior to switching to Eptica CAF did not have a cohesive customer feedback

### 5 | Actionable insight to drive improvements

By better understanding customer questions and through end-to-end reporting, CAF is reshaping and improving its processes to boost productivity and the customer experience. These include changing forms to capture more information and reducing the number of steps in key processes.

## TWO QUESTIONS TO...



**Glen Brooks**  
Project Manager  
Charities Aid Foundation

### What business challenge were you facing?

*"We have a diverse group of customers - from charities themselves, to individual and corporate donors, and they each have a wide range of queries. We needed to improve the experience they received, while at the same time becoming more efficient in how we responded to them."*

### How is Eptica helping you meet your objectives?

*"Not only is Eptica boosting our productivity, but we now have much more detailed, real-time insight into all of our email customer conversations. Access to these metrics is enabling us to become much more customer-centric, changing how we operate in order to better meet the needs of everyone that we work with."*

*"Thanks to Eptica, we're now much more customer-focused and can see exactly how we are performing against our KPIs. We have the facts and figures we need to drive the organisation forward, increasing efficiency and meeting our wider objectives."*

