



How iCarol Transformed One Hotline

Executive Summary

iCarol's subscription-based helpline software is designed to make your job easier as the leader of a non-profit contact center. Our clients include crisis, help and 211 referral lines around the world. This is the story of one such client, a crisis call center, and the challenges it faced in organizing its volunteers, data and operations. It's also the story of how iCarol helped this center surmount these challenges to ultimately offer its community better services within a tight non-profit budget. To protect this organization's privacy—a paramount concern in the support line industry and one we take very seriously—we have changed its name and some identifying details in this white paper.

Introduction

For over 30 years, Compassion Care Helpline (CCH) has provided its community with a valuable phone-based listening service for those in need of an empathetic ear. Its callers run the spectrum of mental health needs. Many are simply in need of a non-judgmental listening ear to see them through one of life's common dilemmas. Some are lonely and socially isolated. Others may have depression or anxiety, while some may live day-to-day with a chronic and several mental illness, developmental disability, an addiction, or dual diagnosis. Some callers are having thoughts or making plans for suicide. Its phone volunteers are citizens who yearn to give back to their community, many of them on a long-term basis. These generous volunteers are tasked with knowing how to talk to a wide range of callers as well as which resources to refer each caller to.

CCH is part of a larger network of organizations throughout its greater region. Like many non-profits, it faces continual pressure to enhance the experience of both its callers and volunteers in order to ensure the best possible outcomes. But as a non-profit, it is paradoxically saddled with restrictive budgets, competition for qualified volunteers and increased demand for services. Before it teamed up with iCarol, CCH had an additional handicap that was impacting its ability to help callers: like many traditional helplines, CCH was using a manual, paper-based system to stay organized, schedule volunteers and track calls.

The Old Paradigm

CCH provides a confidential crisis intervention telephone service for local callers who need a listening ear or a referral to a particular service. CCH has two phone lines, staffed 12 hours a day, every day. Their non-profit business is funded by the United Way and has two managers (one full-time, one part-time) in charge of overseeing the operation and its volunteers. This pool of volunteers includes over 60 people who take on a 4-hour shift every week. Together, these volunteer counselors respond to over 11,500 calls every year.

Before they are approved to take crisis calls, volunteers must go through an 8-session training program, which teaches them how to listen and respond to a variety of callers and situations. Once they've passed this initial training milestone, volunteers receive ongoing education through flyers and other documents posted physically at CCH's call center headquarters. Volunteers are asked to commit to CCH for at least a year.

With only two managers and over 60 volunteers, it was challenging for CCH to stay on top of their administrative and training processes. Here's a little insight into how they were functioning pre-iCarol.

Shift Scheduling

Before iCarol, volunteers signed up for shifts by writing their names on a paper calendar taped to the wall in the center's headquarters. This system was clunky at best. A volunteer who suddenly needed a shift replacement had to call around and try to find someone willing to swap, then call the center and ask whomever answered the phone to please make the adjustment, in pencil, on the paper calendar. Each month, a manager would take a photograph of this messy, handwritten paper schedule and email the attachment to all volunteers. This "snapshot" was only accurate for a brief moment in time. As a result, 8-12 percent of the shifts were going uncovered each month.

Call Reporting

After taking a call, a volunteer would take the time to fill out a 2-page paper form to log the caller's demographic characteristics and the nature of the call. These paper logs were then filed into binders, so managers could later review and comment on calls. For volunteers to get feedback on their calls, they had to take the initiative to look through the binders and read manager notes from their prior shifts. Not all volunteers were that organized or motivated.

Confidentiality

In order to keep call records confidential and anonymous, they were shredded every few months—but this system was not exactly airtight, and until the shredding, the logs simply sat in binders in the office.

Referrals

When callers requested referrals to agencies or resources within the community, CCH volunteers would have to flip through paper binders full of information. When a new

resource came along, a paper flyer was posted around the office, in the hopes that volunteers would take the time to read it. There was no guarantee that every piece of information would be convenient and available to the volunteers when they needed it. Binders were often full of outdated resources and inadequate referrals.

Reporting & Statistics

At the end of the year, CCH's managers would manually perform basic summaries and calculations in order to assess performance and better understand the demographic profiles and the needs of callers. This sort of reporting was incredibly valuable to funders, staffers, volunteers and other parties, but was never quite detailed or accurate enough to offer true insight into the trends and issues that would allow CCH to fine-tune its practices.

Volunteer Community

Another limiting factor CCH was dealing with was the isolating experience volunteers were having by working alone or with only one other colleague at a time. They weren't spending time interaction and learning from each other. In fact, they weren't getting to know each other at all, which was a problem when they needed to get shifts covered. Often, they didn't feel comfortable calling each other. There was little sense of community among the volunteers.

Training

Once the volunteers passed through their initial 8-week training, there wasn't a great way to update them with new information or resources, other than to post paper memos around the office. No one had a great sense of whether volunteers were actually reading those memos, and more importantly, there was no feedback mechanism for volunteers to ask questions.

Its manual and paper processes were preventing CCH from growing. It knew that if it could streamline its administrative processes, foster a stronger community of volunteers and raise its quality of service, it had an opportunity to help an exponential number of callers even as it faced budget cuts, competition for volunteers and increased demand for services. In fact, these constraints were what made a technology investment the only viable solution.

Using Technology to Amplify Human Connection

While the value of any helpline organization lies in its human beings and their compassionate care, technology can provide a stable backbone that allows a non-profit's volunteers, staff and managers to focus on actual conversations with callers, rather than spending valuable time managing resources, scheduling and other administrative details.

Based on the weaknesses it had already identified within the organization, CCH identified seven primary goals for adopting a technology solution:

1. **Simplify the shift scheduling process** and make it easier for volunteers to sign up for, change, swap and unregister from their weekly shifts—ultimately making sure that no shift would go uncovered.
2. **Better organize call reports** so tracking call activity and giving feedback would be automated and effective.
3. **Secure confidentiality** so that names and identifying information of callers, volunteers and staff would be utterly protected. CHH needed the content of calls to be stored and protected according to its strict privacy principles as well as newly enacted legislation.
4. **Create an at-their-fingers library of community resources** so volunteers could always find up-to-date, relevant information while talking to callers in need.
5. **Strengthen analytic tools** so staff and funders could always assess how CCH was running and how to improve service.
6. **Foster a stronger volunteer community** with a roster of volunteers truly connected and committed to the non-profit center.
7. **Expand on volunteer training** with better mentoring, a system for making announcements and a solid feedback loop.

Most importantly, the technology solution CCH adopted would have to be in line with CCH's very tight budget. Any cost incurred by investing in the technology would have to be made up for in the value it would provide the organization over time.

iCarol's helpline software solution turned out to be exactly what CCH was looking for.

Set Free by Technology

When it adopted iCarol's web-based software, CCH suddenly found its administrative time freed up and its capabilities greatly enhanced—allowing it to focus on clientele rather than on staying organized. iCarol's technology solution performed every function that CCH was looking for, but also provided some added benefits it could not have predicted it needed, but which it now can't live without.

Shift Scheduling

Bringing its shift scheduling calendar online meant that CCH volunteers could sign up for shifts from home and request coverage without making a single phone call. Shift scheduling capabilities were totally customizable, so CCH could configure its scheduling tool to alert volunteers by email when shifts opened up and set a number of volunteers needed for each shift, among other features. But the shift scheduling feature had another positive bonus: it let the volunteers get to know each other a little better, with short bios, hobbies, contact information and (optional) photos attached to their scheduling profiles. Volunteers could also post their preferred shifts and their history at the call center. And best of all, iCarol gave CCH the ability to "spotlight" a different volunteer every day, so the whole CCH community quickly got to know each other better and built a strong rapport.

Call Reporting

With iCarol, tracking and shredding paper call reports became a thing of the past.

Volunteers could now fill out call reports online during or just after a call to ensure consistent and timely tracking in a secure, privacy-protected electronic database. In addition, any staff member—from volunteers to managers—could quickly share lessons learned and valuable information gained from calls through an electronic messaging system. iCarol allowed CCH to set up discussions among the entire staff or just a subset. The non-profit's ability to communicate crucial information gained great velocity.

Confidentiality

Privacy legislation is always changing, and it can be difficult for a non-profit on a shoestring budget to keep up. While compliance to the law is ultimately the responsibility of the non-profit, iCarol makes it extremely easy to follow the rules and protect sensitive data. iCarol considers security to be a number one priority, and uses advanced and powerful security technology to protect client information. This includes strong data encryption and password protection. And iCarol's servers are managed by certified professionals round the clock. Nightly backups ensure that no data is every lost. So with iCarol, CCH could trust that their data was absolutely confidential.

Referrals

Once CCH adopted iCarol, volunteers suddenly had access to an electronic resource database that was easy to search and browse while on a call. No more leafing through massive binders full of outdated information. And the very first screen a volunteer would see when he signed onto his shift alerted him to upcoming events, reminders and milestones. News and announcements were always front and center. New referrals, resources and partner organizations were announced promptly right on the screen. No more posting paper flyers and praying they'd get read.

Reporting & Statistics

One of the major benefits to adopting call center software is the ability to view statistics and reports and use them to deduce performance. With iCarol, CCH was able to apply reporting to assess and then modify things like the shift calendar, volunteer time contributions and the referral database. iCarol also allowed CCH to analyze date, time and demographic trends with calls and, ultimately, make adjustments to better serve the call-in audience.

Volunteer Community

One of iCarol's biggest benefits to CCH was the community-building aspect. The entire staff got to know each other better through personal profiles and the Chatboard. iCarol also allowed volunteers to get a glimpse into the human beings that made up CCH's board. By learning about the board and board members' backgrounds and experience, volunteers and staff gained insight into the organization they were working for. And at the top level, iCarol allowed the board itself to better communicate with a board-only Chatboard and calendars.

Training

By making tips and help options available right from the iCarol dashboard, ongoing training for volunteers became much more effective. And training on iCarol itself was

extremely easy, with a help feature that allowed CCH volunteers to help themselves.

Bonus Benefits of a Technology Paradigm Shift

There is no doubt that adopting iCarol's technology helped CCH improve its operations and streamline its administrative tasks. By automating the management of about 200 monthly shifts, 60 volunteer profiles and 11,500 call reports, CCH became a well-oiled machine. This didn't just make operations easier; it also allowed CCH to shift its energy and efforts to community outreach, volunteer recruiting and training, caller counseling and other truly human elements of its core mission.

Helplines exist *to help*. iCarol's technology solution fit within CCH's budget and simultaneously allowed CCH to grow its business. CCH was pleasantly surprised that iCarol didn't just solve the problems it already knew it had; it actually provided some additional benefits.

Increased Sense of Volunteer Community

The volunteer profiles, event calendar, announcement and Chatboard connected volunteers in new and meaningful ways. Volunteers became more aware of what was happening in the organization and were able to meet newly trained volunteers, find out about events, ask questions and share ideas with each other. These efficiencies and improvements increased volunteer loyalty and extended tenure.

Better Service to Callers

At its heart, any helpline exists for its callers, and iCarol helped CCH to better serve callers in many ways. Better shift scheduling functionality meant that far fewer shifts went uncovered, so callers could reach volunteers more easily. Having a resource database at their fingertips meant that volunteers could always provide relevant, helpful referrals to callers in the moment. This sort of prompt and effective attention made callers feel cared for and safe.

Powerful Analytic Tools

iCarol's analytic tools and reporting features allowed CCH's management and board to clearly see how the center was operating and make adjustments accordingly. Easy-to-access reports on shift coverage, volunteer tenure, call lengths and quantities, demographics and a variety of other factors were now just a few clicks away, making it easy to assess trends, cycles and correlations that were nebulous before. Such discoveries led to improvements in the center's operations and better service to funders, callers and volunteers. Non-profits who are competing for funding and other means of support must be able to show their stakeholders the value of their services to the community, and iCarol gave CCH this advantage.

Opportunity to Share Best Practices

iCarol's cloud-based online database now allows CCH to share their data and operations specifics with other centers within their parent organization. By granting specific and segmented permission, CCH can share particular discussions, information and best

practices in order to further its umbrella organization's commitment to helping the community.

Talking to the New Generation

Perhaps one of the biggest benefits that CCH gained from implementing iCarol solved a problem it didn't even know it had. A traditional call center, CCH considered the phone its number one and only tool for reaching out to its community and providing help. But when it adopted iCarol, CCH decided to give live chat and texting a go.

These days, actual verbal conversation is becoming a thing of the past. The younger generations are more comfortable typing than picking up a phone. iCarol's chat and texting functionality meant that CCH could now offer its audience the option of sending an SMS text or using a web browser to chat live with a volunteer. Volunteers quickly took to this platform, which allowed them to cut and paste greetings, commonly used responses and referrals right into the chat box. Their counselors were able to help more people than ever before.

Ease of Implementation

To many non-profits, the idea of a technology backbone behind their operation is daunting. People who choose to work in the non-profit world tend to value interpersonal connection over technology expertise, so it's not uncommon for volunteers and staff of non-profits to consider themselves relatively techno-phobic. Yet, in CCH's case, over 90 percent of their volunteers were already using email and the internet on a regular basis. In fact, most people today show a high level of competency when it comes to using the internet. A [2013 PewResearch report](#) showed that 85 percent of American adults are on the internet.

"I think iCarol is terrific. It is very user-friendly. If you can use email, you can use iCarol."
— An iCarol phone volunteer

A web-based software solution is a logical choice, but for it to work in the non-profit environment, it must be extremely easy to learn and use. iCarol's software was designed to be as user-friendly as email—an interface almost everyone is familiar with these days—with help and support functionality front and center.

Even still, CCH ran into a few volunteers who did not have regular access to email or the internet. These few volunteers circumvented the problem by using the center's computers during their shifts.

Conclusion

When CCH adopted a cloud-based subscription software solution, it was able to breathe a huge sigh of relief. iCarol's web-based helpline software is secure, powerful and—most importantly—easy to train and easy to use. Volunteers, managers and leaders don't need any particular level of technology ability in order to quickly adapt to iCarol's software interface. Volunteer counselors can now talk to those in need on whatever platform works best—the phone, SMS text messaging or browser chat.

iCarol is a secure, powerful and easy-to-use system that can meet any non-profit call center's needs. If your organization is ready to take the next step and streamline your operations while increasing your capabilities—all within your limited budget—[contact us](mailto:info@icarol.com) (info@icarol.com) today to find out how iCarol can work for you.