

## CUSTOMER SUCCESS STORY

# SUPPORTING MORE PEOPLE TO BREAK-FREE OF DEBT WITH IMPROVED DATA INSIGHTS AND REPORTING



**READ HOW WE HELPED TOYNBEE HALL'S DEBT ADVICE SERVICE, DEBT FREE ADVICE, TO UTILISE DATA FROM DISPARATE SYSTEMS AND GAIN VALUABLE INSIGHTS TO SUPPORT MORE PEOPLE IN DEBT.**

### THE CHALLENGE

**Debt Free Advice** is a unique partnership of charities led by **Toynbee Hall** and funded by the **Money and Pensions Service** that provides free, expert advice to people with problem debt.

Their advisors work together with individuals to prioritise their bills and debts, write letters on their behalf, and advocate for them.

The coronavirus pandemic created financial uncertainty for many people across the UK, with many falling into debt. Debt Free Advice wanted to use the data they had to understand more about changing demographics and how they could support people during this challenging time.

After recently introducing many new innovative solutions to improve the user experience, Debt Free Advice were generating data from multiple systems, such as their CRM, omni-channel communications platform and website.

To obtain valuable insight, the data insights team had to rely on a time-consuming, manual process of transforming data into pivot tables, which came with an increased risk of human error.



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Although, Debt free Advice was proving to be progressive and innovative in customer experience, the data insights team hadn't developed the ability to gather data from their disparate systems and use it effectively to gain insight. They wanted to improve their data reporting, so they could demonstrate the impact their service was having.

They approached several companies for help and were impressed with how Climber approached the challenge.

*"We felt Climber were more realistic. It's easy when you're tendering for a project to promise the earth and not deliver, but Climber had built-in a pretty accurate amount of time."*

Liam Randall, Head of Impact and Strategy

**IN THE UK, 8.5 MILLION PEOPLE ARE IN NEED OF DEBT ADVICE, WITH A FURTHER 10.6 MILLION AT RISK OF NEEDING DEBT ADVICE.**

*Debt Free Advice*

## THE APPROACH

Fortunately, the team at Debt Free Advice were very clear about what they wanted and had three main requirements:

1. A visually appealing KPI dashboard that could be easily used by senior leaders to track performance over time, and that could be displayed on screens in Toynbee Hall.
2. A tool the data insights team could use to streamline data and analyse trends in areas such as demographics, specific debts and reasons for debt.
3. A dashboard that could be accessed by the Managing Director of the project and charitable partners, so they could understand where there were gaps in data.

Throughout the development stage we suggested areas where the team could gain more value from their solution and we struck up a successful working relationship which kept the project on track.

*"Climber always delivered on time. Roger was easy going but always on top of it. The time was well allocated, and we had a good foundation for trust."*

Liam Randall, Head of Impact and Strategy

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## THE RESULT

Debt Free Advice now has a flexible Qlik solution that enables them to easily access their data. This means they can proactively talk to the public and the media about the support that is available to those facing financial difficulty, and back up their messaging with the latest statistics.

*"Now, if the Managing Director of the project calls me at 6pm because he's going on BBC News in the morning and needs the latest data, I can respond to his questions much quicker and drill down the data from the app on my phone. By the time I've walked from the train station to collect my daughter from nursery, I've sent him all the information he needs."*

**Liam Randall, Head of Impact and Strategy**

By switching to Qlik capacity licences instead of multiple analyser licences, Debt Free Advice have been able to engage more stakeholders by giving them access to the dashboards. This has enabled them to explore the data for themselves.

Going forward the team want to focus on improving data literacy across the project and add more data sources, so they can continue to gain valuable insights and build on the solid foundation they now have.

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## WE CAN HELP YOU

*If you want to integrate multiple data sources, gain valuable insights and improve your reporting, talk to us today.*

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