

FirstClass is the UK's leading legacy management software. Originally designed by a group of six charities, FirstClass has been continually developed and upgraded with the help of the charities and legacy personnel who use it.

Currently FirstClass is used by over 80 charities. With both an in-house and online version, it is used by the majority of the top 50 UK (legacy earning) charities and by many smaller charities too. FirstClass manages the intricacies of the legacy process and has been designed to be a professional, affordable and cost effective tool for charities seeking to maximise their income stream from legacies.

### Detailed control & reporting

FirstClass is used to keep track of all charitable legacies due and received, providing instant access to pipeline information whenever it's needed. A complete contact history is maintained for each legacy, which is automatically updated each time a new communication is sent or received. FirstClass includes a series of standard letter templates, which can be

# Maximise your legacy income and empower your team

Clear FirstClass

tailored to suit any circumstances. It also produces an extensive set of financial and management reports and feeds directly into the Legacy Monitor benchmarking service. FirstClass is compatible with CRM systems; Care, MS Dynamics, Raiser's Edge and Salesforce.

### In-house or Cloud

FirstClass is available in three versions; In-house, Cloud and Essentials. In-house is installed on one of your charity's database servers while the others are accessed online via any suitable PC. See the separate sheets for further details.

## The Business Case

FirstClass is a powerful software package that enables legacy management professionals to do their jobs effectively. It has been designed by and for Legacy Administrators, so it is not surprising that FirstClass has been chosen by the majority of the top 50 legacy charities.

## Case Work

- FirstClass is quick and easy to use – legacy officers will spend their time doing their job and not fighting with an inadequate system
- Loading Smee and Ford data electronically will reduce the time spent performing data entry
- User customisable standard letters in FirstClass will ensure that communications are 'in brand' and have the correct tone
- Using FirstClass will ensure more timely and consistent communication with third parties
- In many cases, using firstClass will expediate the time taken to close a case
- Transition between legacy managers (either case load changes or staff changes) is smoother and quicker
- FirstClass is very user friendly. New legacy administration staff will quickly learn how to use FirstClass (if they've not already used it before at another charity)
- External legacy consultants all know how to use FirstClass

## Management Reporting

- FirstClass will improve the speed and accuracy of reporting and forecasting
- The detail of stored data makes more advanced analysis of legacy income possible
- Within seconds you can know: legacy pipeline, mean legacy values, notifications between 2 dates, income between 2 dates and cash flow forecast
- FirstClass outputs data for the Legacy Monitor consortium, leaders in legacy strategy

**Increase on Legacy  
Income of £1m by 1%**

**Increase of  
£10k per year**

**Increase on Legacy  
Income of £1m by 5%**

**Increase of  
£50k per year**

There is also a strong business case for FirstClass both in terms of its ability to create additional revenue from legacies and in increased operational effectiveness.

## Adding Value

Skilled legacy administrators 'add value' to their legacy income by how they do their job. Using FirstClass will increase this value.

A number of charities have attempted to quantify the value added by trained legacy officers using effective legacy systems. This figure is between 5% and 8% - i.e. extra to the money they would have received by just 'thanking and banking'.

The table above shows you how much you can increase the value of your legacy income, just by simply adding 1% or a slightly larger 5% onto your yearly legacy income of £1m

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