UNV’s new client relationship management system streamlines our partnership engagement

In 2019, we set out to bring the IT systems of the United Nations Volunteers (UNV) programme up to par with the most advanced technologies in the market. Through our digital transformation project, we are working to increase staff productivity and client satisfaction, while also enhancing collaboration and reducing duplication. A prime example of this is our new client relationship management (CRM) system.

In the area of partnership management, previously, our UNV personnel could not rely on a global support system for outreach and intelligence. Thus far, colleagues stored contact details and partner information in Word and Excel files across the organization. The main avenue for information exchange between different sections and regional offices was e-mail.
Through the introduction of our new client relationship management platform, we have changed this.

“Our client relationship management is about more than just processes. It is about a service-oriented approach to UNV’s funding and UN partners. Our new system creates a common knowledge base for all our personnel, so they are able to understand and anticipate the needs of our partners and serve them better. --Frederic LeMaistre, ICT Chief

We now store all intelligence and partner-related data centrally, and it can be accessed by all our colleagues around the globe. This creates transparency about active partnerships and helps break down organizational silos.

“For our partners, the new system means that they will get better-tailored and more streamlined information. Since the CRM captures the history of our engagement, it augments the capacity of our colleagues to address queries and improves our responsiveness. --Michael Strautmann, Digital Transformation Analyst

In the past, for example, it may not have been apparent to two regional offices that they were communicating with the same external partner. This could have resulted in miscommunication with the partner or even confusion among stakeholders. Such interactions are now transparent for all our colleagues, hence they can align their outreach and partnership brokering efforts. Furthermore, we will be introducing innovative tools to enhance our
UN partner engagement and resource mobilization efforts.

To enable this streamlined partner management, we chose Salesforce, a market leader in CRM platforms, to deliver a unified and easily accessible user experience that is web- and cloud-based. Our decision was based on multiple consultations with our partners UN Women, World Food Programme (WFP), UN Refugee Agency (UNHCR) and UN Population Fund (UNFPA), as well as on an internal comparison of six leading CRM platforms.

Following this, we moved ahead and signed a master service agreement with Salesforce for three years. For the development of the new system, we engaged two specialized software service providers and a consultant who has comprehensive experience in implementing CRM systems for the UN system.

For seamless interactions, we integrated our new CRM with many other internal systems, leveraging our forthcoming, cloud-based volunteer management platform, which is based on Azure technology. The whole endeavour is a great achievement, built on intensive cooperation between sections and regional offices, with all involved colleagues dedicating significant time and expertise for the inception of this powerful new platform.

We are grateful to the German Federal Ministry for Economic Cooperation and Development (BMZ) for its support to UNV’s Digital Transformation project, which has enabled our innovative pathway.


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Sustainable Development Goal: SDG 17: Partnerships for the goals