



Case Study: The Gurkha Welfare Advice Centre – Reducing CRM Storage Costs and Strengthening Data Resilience

INSPIRATIONAL
CLARITY

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Overview

The Gurkha Welfare Advice Centre (GWAC) is a British charity established in 1969 and is the principal UK charity providing aid to Gurkha veterans and their dependants in Nepal and the UK. The GWAC is the main point of contact for Gurkha veterans and their families in the UK, providing welfare advice and support on behalf of the Gurkha Welfare Trust. Through financial, medical and community development programmes, the Advice Centre helps Gurkha veterans, their families and wider communities to live with dignity and independence.

As part of its vital work, The GWAC relies on customer relationship management (CRM) technology to manage information about the veterans and families it supports. However, the organisation faced two significant challenges with its existing CRM platform.

Firstly, file storage consumption had exceeded the organisation's allocated capacity, creating an ongoing cost and management concern. Secondly, the Advice Centre wanted a more reliable and automated way to create daily backups of critical service information about Gurkha veterans and their dependants, ensuring this data remained secure and accessible.

The Solution

Cloud9 worked closely with The Gurkha Welfare Advice Centre to investigate and address both challenges.

To tackle the storage issue, Cloud9 conducted a detailed CRM capacity review and produced a comprehensive analysis identifying the causes of excessive storage usage. The investigation highlighted two key opportunities for improvement:

- Delivering user training to help staff capture and manage emails and documents more efficiently.
- Implementing an automated process to extract attachments stored within CRM notes and emails, relocating them to SharePoint where they could be stored more cost-effectively whilst remaining easily accessible.

In parallel, Cloud9 developed a secure automation to address the Advice Centre's backup requirement. The solution automatically extracts the required contact information from the CRM on a daily basis and stores it in a secure location, creating a reliable backup of essential service data.



The Outcome

The solutions delivered by Cloud9 provided immediate and lasting benefits for The Gurkha Welfare Advice Centre.

Staff are now able to manage emails and documents more efficiently, improving day-to-day processes and reducing unnecessary storage consumption. By moving attachment files from CRM to SharePoint and supporting users with improved working practices, the organisation achieved a 70% reduction in CRM capacity usage.

At the same time, the automated backup solution provides a secure and readily accessible copy of critical contact data, giving the GWAC greater confidence in the resilience and availability of the information needed to support Gurkha veterans and their families.

With reduced storage pressures, improved user practices and enhanced data protection processes, The GWAC is better positioned to focus on its mission of supporting Gurkha communities in Nepal and the UK.

Hear it From The Gurka Welfare Advice Centre

"Cloud9 played a key role in delivering a modern, tailored solution, including the development of a new app and enhancements to how our advisers manage cases. They quickly overcame early communication challenges, ensuring a seamless and highly successful experience.

From initial consultation through to final delivery, their expertise and structured approach ensured a smooth and successful transition.

Their support team has been consistently responsive, providing effective solutions and arranging timely training sessions to empower our dedicated advisers.

We now benefit from improved visibility and control over client contacts and case management. The introduction of dashboards has enabled us to better monitor workloads, make informed decisions, and improve overall efficiency.

Cloud9 remains a trusted partner, and we continue to work closely together to further develop and optimise our Dynamics 365 platform."



Key Results

- 70% reduction in CRM storage usage
- Automated daily backup of critical contact data
- Improved management of emails and documents
- Increased confidence in data resilience and business continuity





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