



IT transformation in a reduced timespan with high level of complexity? Yes, we can!

About the Client:

Centelon's partner is a not for profit charity organisation operating for over 60 years. The partner is present in over 79 countries and has helped over 22 million people to lift themselves out of poverty. It is amongst the top charity organisations globally. In Australia, this charity organisation gets donations to the tune of over \$10 million a month.

Despite this size and scale, its core CRM and donation processing system were outdated and prone to crashes. Even processing pre-defined batch processes such

as processing recurring donations and automated marketing jobs used to be cumbersome and time-consuming. The partner was looking to migrate to a custom solution based on Salesforce to enhance operational efficiency and improve the donor experience.





Challenges

Partner was initially working with a world-renowned consulting firm to assist in their CRM transition. Unfortunately, the project delivery did not meet the expectations. The partner was envisaging

- ✓ Processing recurring donations efficiently and with minimum errors
- ✓ Special handling of high value individuals that donated over \$10,000 in a year
- ✓ Handling of special events that the client supported or conducted
- ✓ Campaign management with budget, spends and tracking of donations against the campaigns
- ✓ Handling of special type of donations like bequests, donations in stock or non-cash items
- ✓ Complaint / Request handling and servicing
- ✓ Integration with finance system (SAP) and payment gateway to process donations
- ✓ Bank statement analysis - Donors that contributed directly to the client's bank account with no customer information





Solution

- ✓ Full payment lifecycle management from processing, adjustments, refunds, receipting and accounting
- ✓ Batch Integration with accounting software to share transaction information
- ✓ Marketing communications by combing and real time syncing of salesforce with Marketo
- ✓ Personalised receipting by coupling Salesforce with Conga
- ✓ Bar code scanning support for faster donation entering by operations team
- ✓ Integration with Westpac trusted frame to handle credit card payments for PCI DSS compliance

Benefits

Reduction of processing time for recurring donations from 7-9 days to under 5 hours by automating complete lifecycle of one-off and regular donations.

Enhanced donor experience by personalised handling of key supporters / high-value donors including personalised receipting, relationship manager tagging, automated notifications.

Regulatory compliance by handling of Credit Card information in accordance with PCI-DSS.

Seamless user experience brought into the process via integrations with Microsoft Outlook, Box (Document storage), Single Sign On (SSO) and other web applications.

Partner introduced special type of donation i.e. bequests with handling of non-pecuniary donations (land, shares).

Personalised and rule-based marketing communications based on donor's preferences and history.



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