Deploying a grants and donations management solution for Baptist World Aid

Introduction

The Baptist World Aid Australia (BWAA) is a not-for-profit organisation that works with partners across Asia and Africa to provide education, life skills, health care, safe water, agriculture and emergency relief. BWAA is made up of over 30 employees who are predominately based in Sydney, with satellite offices also located in Queensland, Victoria and South Australia.

From a structural point of view, BWAA is comprised of two main processes, donor management and grant management. Donor management involves collecting funds from their donor base and their grant management includes the distribution of this money to partners at the community level. BWWA's goal is to assist in significantly eliminating poverty, empowering individuals, and creating self-sustaining communities.

Challenge

The existing BWAA in-house CRM solution was proving to be inefficient, inconsistent and unable to cope with organisational growth. Having an in-house system was also increasingly difficult to manage. Changes would take a long time to implement and required specialist skills were not readily available to maintain the system. This created significant support and running costs. Connecting with current and prospective donors is critical for BWAA and their in-house system was causing problems instead of making communication timely, easy, and personalised. BWAA was looking for a cost-effective and flexible CRM Solution that could address their specific needs of automating their commercial engagement processes.

Solution

Whilst many CRM systems are offered on the marketplace, only a small minority provide the dual capability of managing and linking donors and community partners. MS CRM was selected because it is cost-effective, exceptionally flexible, and allows additional modules to be added on top of its standard functions. Unlike its competitors, Microsoft offers charity organisations, like BWWA, access to MS CRM at a reduced cost making implementation and on-going software maintenance highly affordable.

ECLEVA implemented Microsoft CRM and utilised their technical expertise to further configure the system to address BWAA's unique needs. In the case of donor management, this included tracking all the different types of donations, automating monthly pledge deductions, automating personalised gift acknowledgements, tracking all finances and integrating CRM with MYOB. In grant management, this included tracking partner information and efficiently carrying out approval, budgeting, settlement processes including automatic foreign exchange conversion and distribution of funds to partners.

Furthermore, the tracking of donors provided essential marketing information for BWAA so that they can create targeted campaigns. Additionally, the generation of reports through the integration of CRM with Excel, provides BWWA with essential decision making capability such as which media to use when running a campaign.

30
employees

Outcome

The design, development, implementation, testing and sign off BWWA's new CRM system took nine months from top to tail, a fast turnaround for such an extensive project. Its ease of use and native Outlook familiarity has allowed this new system to be easily adopted by its users. The new CRM system has been in use for over two years and it has considerably increased the overall effectiveness of the existing customer relationship strategy as well as significantly reducing the running and administration costs of BWAA. This has ensured that each donation goes where it is intended and not to administration. More recently, ECLEVA has developed an application that allows online donations to be made through BWAA's website. ECLEVA has ensured that these donations are processed in real time and information is automatically sent to CRM and MYOB. In addition, donors can now update all their information such as address and phone number though BWAA's website.

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