

“We can better understand how to engage donors by understanding the subjects close to their hearts. It is much less expensive to retain a donor than recruit one and this approach helps us to do that.”

Vivien Maidaborn
Executive Director
UNICEF



Fujitsu deployed Microsoft Dynamics CRM for UNICEF to increase efficiency, enhance process visibility, improve auditability and enable campaign customisation.

At a glance

Country: New Zealand
Industry: Charity
Founded: 1946
Employees: 30
Website: www.unicef.org.nz

Challenge

UNICEF New Zealand relied on the repeated manual entry of donation details, taking up to 30 minutes to process each donation. This level of inefficiency could no longer be tolerated so it decided to automate the entire CRM process.

Solution

The organisation worked with Fujitsu to configure and deploy Microsoft Dynamics CRM for 25 users, encompassing every aspect of donor management including pledge creation, batch processing and payment runs, donation receipting, marketing, campaign analysis and sales systems integration.

Benefit

- Automated donations have risen from 15 to 90 per cent, boosting efficiency, staff wellbeing and productivity
- Total process visibility enables improved auditability while reducing human error and any fraud risk
- Campaign management has been transformed through better donor analytics, improving conversion rates

Customer

For millions of children around the world, there's no such thing as a childhood. War, work or grinding poverty mean that far too many are denied their basic right to be children. UNICEF works to combat this and to protect children's rights in 194 countries. In New Zealand, it has a staff of approximately 30 in its Wellington and Auckland offices. The organisation has sophisticated donor management practices, a substantial regular donor programme, legacy, bequest and sponsorship programmes as well as advocacy networks.

Products and services

- Fujitsu Systems Integration
- Microsoft Dynamics CRM Online with web interface
- CRM Consulting, CRM Configuration and Customisation
- Testing and Training

Challenge

Managing and tracking all vital donations was proving both time-consuming and inefficient for UNICEF. All other forms of donation – from website donations, cheques to cash on the street or at events – had to be manually entered into the donor management and financial system, making the potential for human error, or even fraud, a real concern.

"We would log the donation in the website, print off the information and then it would be manually entered twice more in other areas of the organisation such as CRM and finance," explains Vivien Maidaborn, Executive Director, UNICEF. "That creates 30 minutes of work per donation – when you are dealing with an emergency where hundreds of donations are coming in, it was becoming very difficult to cope and ensure accuracy."

UNICEF knew there had to be a system that could transform and streamline its outdated manual process for improved efficiency, productivity and transparency. Following detailed market analysis, it selected Microsoft Dynamics CRM. The next challenge was to find the right implementation partner.

"Our original choice simply didn't have the capacity to deliver and struggled to build momentum; on Microsoft's recommendation we spoke to Fujitsu which immediately understood our objectives," adds Maidaborn. "It also made a very competitive offer and provided an honest appraisal of what we should be aiming for. That made it the natural partner for us."

Solution

With no involvement from Microsoft, the Fujitsu team with UNICEF's project manager were responsible for the successful implementation of the solution. This involved a four-month migration from the old manual processes to a new, fully automated platform.

"We needed to integrate with the website and finance systems while introducing customer-centric analytics and segmentation so we could provide customised responses to donations and create relevant campaigns," continues Maidaborn. "By working closely together over weekends and the Christmas vacation, we were able to make this transition without disrupting the business."

The new solution ensures donations and pledge data captured via the website is passed into CRM, receipts and customer communications can be automatically sent out from CRM.

Fujitsu also developed an application that enables data initially recorded by these systems to be easily imported into CRM (to update/create multiple records in a single step) while finance intelligence is via exported reports.

In total, the Fujitsu implementation encompasses every aspect of the donor relationship including activity management, pledge creation, batch processing and payment runs, donation receipting, marketing, campaign analysis and sales systems integration.

Benefit

The new Microsoft Dynamics CRM platform has made an immediate impact on UNICEF with the proportion of automated donations rising from 15 to 90 per cent. This has led to increased efficiency, total process visibility through a single pane of glass and vastly improved auditability.

"We can concentrate on our core objectives and account management because we are no longer bogged down by paperwork," says Maidaborn. "We can also check data such as phone numbers or addresses instantly rather than physically digging out the details. That all saves time and effort and frees us to become more strategically focussed."

The system has also transformed UNICEF's approach to campaign management. Knowing exactly who donates what, when and to whom enables the development of a much more personalised relationship, which in turn makes increasing donations easier.

"We are training a number of super-users to really get to grip with the analytics and deepen the effectiveness of our campaigns," comments Maidaborn. "As a result, we can now better understand how to engage donors on an ongoing basis by appealing to subjects we know are close to their hearts. It is much less expensive to retain a donor than recruit one and this approach helps us to do that."

This engagement with Fujitsu has proven so successful that UNICEF New Zealand is looking at how the roadmap will unfold and what role Fujitsu will play. With a three-year plan in place to migrate all data to the cloud, there are clearly opportunities to extend the partnership. "Fujitsu went way beyond any expectations of a professional company and communicated how much they loved working on the project. Its flexible approach meant that less problem solving was required," concludes Maidaborn. "Moreover, there was clarity and transparency which allowed us to control costs and achieve the outcome we needed. We'll certainly continue to work with Fujitsu on CRM in the future."

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