Kidney Health Australia

Kidney Health Australia gets close to supporters with Donor CRM system from Professional Advantage

For forty two years Kidney Health Australia has been promoting kidney and urinary tract health to consumers and the medical profession. During that time it has funded more than $23 million for research into kidney disease. The organisation continually funds and implements awareness and education programs to help reduce the incidence and impact of kidney disease in the community, plus it provides a national network of education, care and support for patients, their families and carers.

With one in three Australians at risk of developing kidney disease and one in seven already showing at least one sign of existing kidney damage, it's a major challenge for the organisation. It's also an expensive issue for the community: maintaining one person on dialysis for a year costs Australia approximately $80,000.

As a non-profit organisation that receives almost no funding from government, Kidney Health relies on a comprehensive program of sponsorships and fund raising. Almost forty percent of its income is derived from an annual series of 13 lotteries which are managed through the organisation's call centre in Adelaide.

Problems

Four years ago Kidney Health wanted to align its IT strategy more closely to the organisation's business objectives. An information technology review identified that existing systems were inadequate and hindered business development.

Jacqueline Manché, Chief Operating Officer and Chief Financial Officer explains, "When I arrived at Kidney Health in 2005 there were two major issues that we needed to solve. First was our accounting function. Although we had implemented Microsoft Dynamics GP, the organisation had underinvested into the solution and as a consequence the software was two versions behind the current release and staff were not utilising the software functions properly. There was a lot of work needed to upgrade the software and hardware so that we could report on individual Kidney Health events and programs and obtain more value from

At a glance

Business Objective:

The not-for-profit organisation wanted to integrate and streamline systems to better support business objectives. At the same time, it needed to develop closer relationships and more targeted communications with donors, sponsors and other supporters.

Solution:

- Microsoft Dynamics GP
- Microsoft Dynamics CRM
- Professional Advantage-developed Lottery and customised Sales Order Processing Module
- Scribe Insight Integration linking Dynamics CRM with Noble Maestro Call Centre System

Business Benefits:

- Ability to develop closer, "stickier" relationships with supporters and donors
- Financial reconciliation occurs within hours rather than weeks
- Reliable integration has ensured data is accurate and eliminated requirements for manual intervention and remediation
- CRM system cost of ownership and recurring costs have been significantly reduced
- The board and senior management now receive up-to-date quality reports within best practice time frames

the system."The second issue related to the organisation's customer relationship management (CRM) system. Manché continues, "One of the major activities in this organisation is the operation of lotteries offered through our call centre. To support this activity we maintain a large database of supporters, donors and other interested parties.

The problem we faced was that the Call Centre fundraising and the CRM systems were poorly integrated into the procedures that were not documented. A significant investment in time and resources was required to ensure the system functioned and even then reconciliation and reporting were difficult. The CRM system was high cost to operate but was under-utilised with a complex and dated design leading to poor rates of user adoption.

The key areas of concern and business risk were:

- The system required substantial out of hours work as no maintenance could be performed while the call centre was running.
- The integration of data between the call centre and the old CRM system was prone to failure resulting in data corruption.
- Payment details could not be verified until the following day which caused significant reconciliation issues.
- Due to unreliable software, each lottery draw was pre-drawn in a test environment to check for errors which, if present, had to be corrected before any live draw could take place. This further added to the need for out of hours work by employees.

A diminishing pool of expertise for support of the CRM software and lack of effective integration processes with the financial system contributed to the conclusion that the CRM software had to be replaced.

Solution

"We first evaluated the approach to replacement that best suited Kidney Health's needs," Manché says. "There are a number of specific niche systems for fund raising available in the market but we felt that a product with broad CRM functionality that was easy to integrate with Microsoft Dynamics GP and with the Call Centre system was a better overall choice. We were also keen to ensure better levels of user adoption so a product with a familiar "Outlook-like' interface offering flexibility through

configuration and customisation was judged to provide better value for money."

With the approach determined we got in touch with Professional Advantage to establish a new CRM infrastructure based on Microsoft Dynamics software. We proposed to extend the out-of-the-box software by engaging Professional Advantage to develop a lottery and donor processing function based upon the CRM Sales Order module. This extension to CRM provides the specific business functions that non-profit organisations require to manage fund raising.

The proposal provided by Professional Advantage met all of Kidney Health's requirements including the ability to customise, integrate and interface CRM to the Call Centre and finance software using Scribe. In late 2006 the project was given the go-ahead.

Benefits

Over the ensuing year and a half Kidney Health's core IT systems were completely redesigned and replaced. The Microsoft Dynamics GP financial software was upgraded and staff re-trained. Manché, who believes that a "hands on" approach is important in a small organisation like Kidney Health, learned to use the Microsoft Dynamics reporting and analysis tool, FRx. With the support of a colleague, she set up new reports providing an immediacy and depth of financial information that had previously been lacking in the organisation. In addition to management and board reports, her team created reports detailing income, expenditure and services data as required by the Federal and all State governments.

Data from the old CRM system was transferred to the new customised Microsoft Dynamics CRM fund raising solution and bidirectional integrations to the Call Centre system were established. The system has provided an important boost to the organisation's cash flow through faster recognition of revenue. As donations are booked in over the phone they are immediately processed to the bank via an electronic payments gateway interface.

This gateway is also available in CRM for payments received by mail. This means that money is confirmed as cleared funds immediately, with very few transactions being rejected. Furthermore, data detailing all cleared funds is prepared as a

batch in CRM and automatically downloaded into Microsoft Dynamics GP on a daily basis.

Reconciliation of lottery ticket sales and cash used to be a major issue for Kidney Health. It would take several days to complete, in part because of the government regulations that require separate bank accounts for each state's revenue. Now, the integrated nature of Microsoft CRM and Microsoft Dynamics GP means the task can be completed across all accounts within just one or two hours.

Greater segmentation of the supporter database and more targeted messaging has helped to improve lottery ticket sales in all States, while less manual intervention has reduced both errors and risk from the process.

Better integration design between the lottery and call centre systems has also meant less down-time and no weekend work is required for maintenance of the call centre data.

Future

Four years after the original IT review Manché continues to identify and initiate new IT projects as part of her determination to ensure continuous system improvement. She acknowledges that the development and revamp of systems has been a huge job but adds, "It's worth all the hard work because we've got exactly what we wanted out of it in the end. We moved from having two independent systems that didn't talk to one another to a CRM that sends regular batched information to Microsoft Dynamics GP. It's virtually seamless. "Where once it used to take weeks to reconcile a lottery, now it takes half a day."With reporting timely and accurate, the call centre stable and with a sound revenue stream in place, Manché has been able to turn her attention to developing new, exciting fund raising and educational activities. In November 2009 for example, the organisation launched KHA Comms, a telecommunications shop where consumers can purchase mobile, home phone and ADSL services at the same time as supporting Kidney Health Australia. It's an unusual and innovative concept for a non-profit organisation and one that should help to spread Kidney Health's message far and wide in the years to come.

Manché concludes, "Having all these systems in place has positioned us to become a bigger and better organisation that is hopefully picking up market share. We couldn't do it if we didn't have the underlying systems to support us."

In December 2009, all of Kidney Health Australia's hard work was recognised when the organisation won the Professional Advantage award for Overall Winner for Business Improvement 2009.

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