

# Customized Operations Solutions



## The Client

A large metropolitan Jewish Federation receives more than \$24,000,000 in annual contributions each year and has a database of over 50,000 donors and prospects. Over the last year, this Federation invested in stream-lining the fundraising operations and applications to facilitate management of these processes.

## The Challenge

Coordinating, accessing and maintaining quality control of the massive paper volume required to generate pledge documents, enter new pledges and maintain donor information. Staff members had multiple points of entry into the Federation's various systems, and were required to complete extensive paper documentation related to every pledge. Without a centralized system, quality control was difficult and pledge information was frequently lost or inaccurate.



## The Solution

### Step 1: Assessment

The Service First team worked to document the organization's existing technology infrastructure and gathered detailed requirements on the pledge application process. Interviewing multiple staff members enabled the SFC team to discuss various solutions with Fundraising, IT and Management.

### Step 2: Custom Development

Our team developed a consolidated pledge entry system, creating one application for the client staff to enter new pledges and maintain existing donation data. Quality control edit checks and data validation requirements reduced data entry errors by reviewing data prior to saving it in the system. For this solution, we mapped the fundraising codes directly to the pledge entries, decreasing the data entry time for the external caging operation.

The Service First team developed a second application that enabled client staff to remotely generate custom pledge cards for individual donors and groups while at events, dial-a-thons, parlor meetings and/or other large functions.

### Step 3: Custom Reporting

The SFC team leveraged existing databases and reporting systems to ensure all data was in-synch and provided in real-time. We established links to the new application on the Federation's intranet and existing applications (ex: GiftTraq) were linked to update donor or accounting information.

### Step 4: Training and Support

The Service First team provided detailed product documentation and the end user training required for a successful launch. Post go-live, our team remains dedicated to assist internal staff with technology upgrades, software updates, changing application requirements and on call emergency support.

## The Results

One application now contains all pledge information, which drastically decreases the risk of errors and duplicate records. A central system provides client staff members with increased efficiency and requires less user training. The SFC solution delivers accurate, secure and real-time donor and pledge information at the touch of a button.

*Unleash The Knowledge In Your Data*

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