

# A FULLY INTEGRATED, END-TO-END FUNDRAISING & SUPPORTER MANAGEMENT SOLUTION



## Simple. Easy. Efficient.

- Uniquely designed for not-for-profit organisations
- Low risk investment
- Simple, effective, and easy to use
- Enables insight into your marketing return on investment
- Increases number of and value of donations
- Boosts donor acquisition
- Increases supporter retention
- Greatly reduces administration costs
- Improves transparency and accountability



# WHAT IS IT?

The Fundraising & Supporter Management solution enables organisations in the not-for-profit sector to manage a constantly changing business landscape of increased competition and decreasing supporter levels. This is now a fact of life for not-for-profits and developing strategies to manage these changes is essential.

Our solution gives you the tools to handle daily business requirements, such as managing supporter contact information, receiving donations, direct mail programs with campaigns and appeals, regular giving, bequests, workplace giving, and trusts and foundations. You gain a 360 degree view of all contacts, relationships, communications, activities, and processes.

Increased efficiency in managing donor information can reduce costs, which can have a profound effect on the net value of donations. By reducing operating costs, you can use more of the funds raised to help clients relying on you for assistance.

TechnologyOne's Fundraising & Supporter Management solution combines your operational data with complete integration to financial and merchandise information. This provides total control of your fundraising activities and visibility across the organisation, enabling improved management and operational efficiencies.



# SCENARIO

## Case study

A not-for-profit organisation learns that it is losing supporters faster than it is gaining them. At the same time, new supporters are donating less than they used to. Without the same donor funds coming in, the organisation is unable to deliver vital services. The fundraising and marketing teams employ a scattered approach to promotional activities, making it difficult to see and understand campaign results in order to improve the organisation's promotions. There is concern that community services cannot be maintained if donor contributions are not increased in the near future.

## Solution

To overcome these issues, the organisation implements a donor management software system that centrally holds all donor and bequest information, from supporter details to interactions and receipting. The system also provides campaign management to plan marketing activities; and track achievements and return on investment.

These integrated components provide visibility across the organisation and deliver critical business and operational metrics. The organisation can now make more informed decisions about promotional tactics and relationship building with long-term supporters. It can also precisely track and view operational costs and donor contributions, and monitor which promotional activities are most effective in generating new donors or increased levels of support. This results in more funds being donated, which are better managed, so more money is available for services delivered to the community.



# WHO IS IT FOR?

The Fundraising & Supporter Management solution greatly assists all roles in your organisation.

The solution helps marketers plan and execute fundraising tactics that increase frequency and regularity of giving. For business development managers, it provides insightful donor history that allows delivery of more effective marketing messages. Service managers have instant access to all interactions with clients and an accurate view of costs associated with providing essential services.

Management can access a centralised fundraising portal that provides tight control and a 360 degree view of the business, enabling better organisational management.

Role	Advantage
Marketing & Fundraising	Manage fundraising campaigns and understand return on investment
Business Development	Leverage donor intelligence and increase opportunities
Service Delivery	Track and improve client outcomes
Finance & Administration	Increase efficiency and reduce operating costs through Enterprise Financial integration



# CHALLENGES

An everyday challenge for the not-for-profit sector is doing more with less. The economic climate has meant that the clients of not-for-profit organisations have an ever-increasing need for services, which can present major challenges for these organisations. These include:

- Tight timelines and scarce resources
- Increasing efficiency – doing more with less
- Balancing increased demand with the ability to deliver quality services
- Measuring actual outcomes against the cost of services delivered
- Measuring expenditure in administration to maximise available funds for delivering services
- Maintaining visibility of interactions with donors
- Maximising coordination amongst departments and organisational groups
- Demands for greater transparency and accountability with lower administration costs
- Increased competition for a diminishing pool of donor funds
- Increased marketing costs of acquiring and retaining new supporters
- Measuring and increasing the return on investment of fundraising activities
- Doubt around future funding from traditional sources eg Government



# THE BENEFITS

An efficient fundraising solution can increase community support for a particular cause and should assist an organisation to increase revenue, reduce expenses, boost supporter levels and loyalty, and improve its services. TechnologyOne's Fundraising & Supporter Management solution can help achieve this through the following features:

## Stakeholder management

TechnologyOne's Fundraising & Supporter Management software provides one central contact system to manage supporters and their relationships, including donors, auxiliaries, committees, corporates, volunteers, and employees.

Interactions with both internal and external stakeholders are tracked and managed through the solution. Records are instantly accessible, providing history and insight into relationships. Alerts remind staff of important follow-up dates and the system can synchronise with Microsoft Outlook, providing efficiencies and a user-friendly experience.

### Benefits

- An organisation-wide communication system delivers a higher level of service to stakeholders
- Engagement levels are consistent, personalised and professional

## Campaign management

Fundraising campaigns and direct marketing activities can be planned, with return on investment monitored and reported.

### Campaign planning


Set objectives and activities, including timelines and alerts for each step of a campaign.

### Benefits

- Streamline processes to increase efficiency and reduce costs
- Reduce the cost of acquiring donors, receipting donations, and ongoing donor development
- Capture all interactions and transactions so donor potential can be identified; and more time and resources can be allocated to those likely to make the largest contribution

### Analyse donation recency, frequency and value

Analyse donation recency, frequency and monetary (RFM) value to execute targeted appeals through the software's unique RFM analysis functionality.



“What we want is to acquire new supporters by understanding current supporters. Then we can attract more of those like-minded people. With our direct mail campaigns, we’re targeting the right people and that’s a cost saving for us.”

Stephen Ryall, General Manager, Children’s Medical Research Institute.

#### Benefits

- Use RFM analysis to improve the return on investment on campaigns and appeals
- Target the right people with the right message who are most likely to donate

#### Reporting

Analyse appeal outcomes through response channel and rate, donor demographics, donor tenure and retention, multiple gift analysis, and donation/acquisition costs.

#### Benefits

- Measure revenue down to the campaign level, which results in effective measurement of the return on investment
- Improve planning for future fundraising initiatives to deliver an increased return on investment

### Supporter and donation management

Manage the entire supporter and donation process, including donations, pledges and bequests, donor interactions, receipting, progress updates, thank you letters, and grant management.

#### Benefits

- Better donor lifecycle management, providing greater accountability of donor contributions
- Provide donors with updates about outcomes; increase loyalty and generate further pledges

- Bequests can be increased through a well-managed lifecycle

- Track opportunities and deadlines for grant funding to ensure funds are distributed efficiently

- Increased visibility improves decision-making and enables faster action from management

### Event management

Manage specific events within a fundraising campaign, from gala dinners to golf days.

Plan, schedule and report on events, manage event registrations, table and volunteer allocation, and track opportunities for event sponsors. Alerts remind staff when tasks are due, ensuring seamless event coordination.

#### Benefits

- Well-organised events that support fundraising campaigns and attract new donors, retain existing donors, and increase funds
- Event management is efficient because one centralised system is used for all tasks, including segmentation and direct marketing
- Process automation eliminates mistakes and time-consuming tasks, and helps reduce expenses

## About TechnologyOne

TechnologyOne (ASX:TNE) is a leading enterprise software solutions provider. For more than 20 years we have been providing deeply integrated software solutions for business, government, financial services, health and community, education and utilities organisations. Tens of thousands of people each day use our world class solutions, which we develop, implement and support.

Our organisation wide solution suite, integrated solutions, and custom designed solutions provide world-class services that are based on leading edge technology and are backed up by a substantial R&D program, providing our customers with a long-term, secure and valuable partnership. TechnologyOne employs more than 700 people and has a presence in seven countries.



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