



## Mission Australia improves donor service and grows fundraising through cloud transformation

*Guest post by Elvira Lodewick, General Manager, Marketing and Fundraising at Mission Australia*

Like in most organisations, our digital transformation plans came complete with a business plan. The plan for Mission Australia stated that a year out from deploying Dynamics 365 and Power BI to support our fundraising initiatives we would start to see benefits from increased income and reduced costs.

It's always hard to know exactly what drives each dollar of growth – but 18 months since we launched our new supporter CRM and marketing automation system our fundraising is growing, donor retention improving, all my staff members have access to reports and tools that make them more efficient, and we have much greater understanding of our donors – and what makes them engage with and donate to Mission Australia.

In the past, for example, it was hard for our contact centre staff to get much information about individual donors – they might have to ring back if a donor asked a question, simply because the information wasn't available at their fingertips. Now Dynamics 365 makes that information instantly available.

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With Power BI we have the sort of analytics that allow us to identify which donors to contact when, and through which channels – be that traditional or online. We can also check that we are running our teams efficiently and achieving the greatest impact, and we have full transparency into the success of our campaigns – which helps us identify what works best.

We can use all of that insight to continuously improve and grow the pool of funds that we raise and can consequently use to help people – which is literally our mission..

While the benefits that we were hoping for are now flowing, we have to acknowledge that this kind of all-encompassing transformation is challenging. As a charity our primary focus is on helping people and in trying to maximise the impact of every dollar we receive, we had to craft a strong business case, secure the budget, then tackle the change management needed for the transformation to be adopted and supported by all stakeholders.

Having experienced several poorly managed, lengthy system transformation projects in the past, the Marketing and Fundraising team members were hesitant to embark on a new system implementation project. Moreover, due to various issues, including unclear responsibility allocations between the heads of Marketing and IT, our first attempt at implementing a new Microsoft CRM (Dynamics 2016) failed. We had a strong relationship with Microsoft – but needed boots on the ground to help us. We'd started to work with Microsoft partner Barhead and also were able to use Microsoft's Fast Track service.

The Microsoft team took a good look under the hood to find out what was awry with the design of the first attempt and I worked with Peter Smith, who joined Mission Australia as our new CIO in September 2016 and with the Barhead team on improving the governance and management of the implementation project.

The final recommendation from that process was to implement a Dynamics 365 CRM with Marketo Marketing Automation, and from that point it was a really fast turnaround – working with Barhead we were up and running in five months. Our decision to go with the fully cloud-based Dynamics 365 solution also gave us the confidence and assurance that our CRM capabilities will continue to grow as Dynamics 365 evolves.

Looking back on the project, I would like to share 2 key learnings. One: successful transformation is all about people. It's really important to make sure that you have the right



people working with you – in the business, in IT and on the partner and vendor side. I had that with our Marketing and Fundraising team, with our IT team, with Barhead, with the local Microsoft and Fast Track teams. It's not just a question of quantity, you need to ensure you have quality people with experience, skills and a determination to make a program like this succeed.

And two: once you have your people in place – prepare, prepare, prepare. Really invest time and energy and resources before you start coding anything or designing anything – that is the only way to make sure you get a solution that will work for you and deliver the benefits that you anticipated in the business plan.

What we have learned along this journey could be really useful to other not for profits. That's why one of our team members Yael Wasserman who is a Senior Manager of CRM and analytics in the Mission Australia Fundraising and Marketing team has started an industry group where charities can come together and share their insights.

Barhead is hosting those quarterly meeting and hopefully there will be real value for all the participants, ensuring they, like us, can reap the rewards of a successful cloud transformation.

