

COMPANY

Heifer International

INDUSTRY

Non-profit

TOOLS

Document Management
Workflow Automation

PLATFORMS

Client: Windows and Web
Server: Windows and
Microsoft SQL
Fujitsu Scanners
Blackbaud CRM Integration

CLIENT'S NOTES

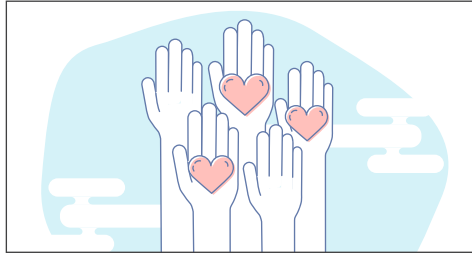
"Our Optix system empowers Heifer to focus on our donor relationships. Using the power of Optix document scanning, indexing, storage, retrieval, and workflow, we are able to more efficiently process donations, manage our information, and handle requests. Improving efficiency and effectiveness allows more of our donor resources to be used in our mission of ending hunger and poverty, enabling us to create new opportunities and improve the livelihoods of our participants in the US and worldwide."



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Case Study

How Streamlined Document Management Led to a Better Donor Experience



For more than 70 years, Heifer International has provided livestock and environmentally sound agricultural training to improve the lives of those who struggle daily for reliable sources of food and income. Heifer is currently working in 30 countries, including the United States, to help families and communities become more self-reliant.

Issue

As an international non-profit association, Heifer processed donations manually by grouping documents into batches, totaling donation amounts, copying each document, labeling and stuffing manila envelopes by batch, and then placing them on carts and delivering them to data entry staff, who would manually perform data entry for each donation in batch by entering numerous data fields into Heifer's CRM. Clearly, this manual process took valuable time, invited human error, reduced customer service, but more importantly, diverted money that could have been used to provide additional client services.

Solution

Optix created several custom utilities that maintained the concept and naming conventions for Heifer batches while allowing all donation documents to be scanned to a dynamically created folder on a central Optix Server. This folder of scanned batch documents is then placed into an Optix Workflow that automatically routes batches to data entry personnel.

Outcome

Because all donation documents are indexed into a repository on the Optix Server, documents can be found, retrieved, and viewed in seconds. This enables donor services to respond quickly to donor inquiries and helps to cultivate close relationships with the generous communities that fund Heifer's vital mission. Specifically, automating donation processing resulted in a 40% increase in productivity and the elimination of lost or misplaced physical paper documents. Moreover, labor costs decreased and the automation of data transfers to the CRM improved overall system accuracy and reliability.