

Challenges

- Manually managing paper forms and donor letters is a timeconsuming chore that is costly and error prone.
- Staff had to open all the forms and photocopy each one of them, then remove the credit card details off the photocopies and wrap them back up with the original card.
- Another issue was rejected payments as supporters had to log in to update their payment details.
- Physical paper forms had to be archived for seven years which resulted in huge storage costings.

Solution

- The Smith Family implemented an EzeScan Document Digitisation and Processing Solution.
- They also adopted EzeScan's Web Apps tool, which allows supporters to click a unique link to update their details online without needing a password.
- EzeScan's EzePayment gateway also meant credit card data is tokenised and stored by the merchant vault so that no credit card data is stored locally.

With the help of EzeScan, The Smith Family has boosted donations and improved donor engagement whilst saving 1,600 hours in staff time each year. Here's how they did it...

Manually managing paper forms and donor letters is a time-consuming chore for many charities. It's costly and error prone, syphoning vital staff resources from more productive fundraising tasks.

The piles of paper were particularly tall for The Smith Family, which runs a sponsorship program that allows donors to write letters to the students they are supporting. "Sponsors get to see updates about their student every year. They can send them a voucher or a gift for their birthday or for Christmas that we'll pass on to the student," Suzanne Hilellis, Product Owner of Supporter Squad at The Smith Family, says.

To ease the burden, in 2018 The Smith Family implemented a document digitisation and processing solution from EzeScan. The charity took a further transformative step in late 2019 by adopting the EzeScan's WebApps tool, which allows supporters to click a unique link to update their details online without needing a password.

The changes are yielding big dividends for the charity, which is now saving around 1,600 hours in volunteer and team member processing time each year. As a result, it estimates it has unlocked around \$120,000 in income revenue and cost savings, while improving its donor engagement.

"Before 2018, we would send the sponsors a mailing that said: 'Would you like to send a gift or a message to your student? Just fill in this form and send it back with the card and we'll get a gift voucher to your student. We had to open all the forms and photocopy each one of them. Then we had to remove the credit card details off the photocopies and wrap them back up with the original card. The original forms then went to our data entry team for processing. Then everything had to be archived for seven years. It was a really long winded and confusing process" Hilellis says.

Document digitisation meant The Smith Family was not only able to reduce but eliminate these time-consuming chores. "It means the archiving for our data entry team has gone down significantly. This is because we now have scanned copies saved and we no longer have to hold the physical paper forms for seven years."

The net result was a saving of around 450 hours each year in managing donations (including batching documents, archiving and processing voucher packs). The Smith Family saved an additional 580 hours on processing correspondence.

Results

- Saved around 450 hours each year in managing donations and an additional 580 hours on processing correspondence.
- With EzeScan's WebApps a lot more people are updating their details which has freed up around 300 staff hours each year that would have otherwise been wasted chasing supporters, while securing approximately \$60,000 in otherwise
- Saved 55 hours in processing time by using EzeScan Digital Forms for its Christmas gifts, which has resulted in \$48,000 in gross revenue and a 30% uptake in form completion.

About EzeScan

EzeScan provides fast, cost effective business process automation solutions including simplified document back scanning, accounts payable, data robotic process automation, forms data extraction, mailroom/correspondence automation and highly integrated EDRMS capture. With thousands of installations in Australasia, North America and the UK, EzeScan is your ideal digital transformation provider.

The Smith Family also streamlined their rejected payments workflow. Previously, the charity had used a self-help web portal that required supporters to log in before they could update their payment details. EzeScan's Digital Forms Web App tool streamlined this process for donors updating their details after a rejected payment. They now receive an SMS or email with a link to their own unique form where they can update their card details.

"We would send out an email and a text message. It asked supporters to either call us or to go on to the portal and update their details. What we found was a lot of people would click through, but weren't making it past the login page. Now a lot more people are updating their details and are doing it quicker. Because of the unique links, supporters don't have to log onto a portal. Once they update their details, it gets saved to a file and the next day we import it."

This freed up around 300 staff hours each year that would have otherwise been wasted chasing supporters, while securing approximately \$60,000 in otherwise lost revenue. The system is also very user friendly, with 100% positive feedback from supporters who have completed the form.

The Smith Family is now leveraging EzeScan's Digital Forms to replace a number of other paper forms. EzeScan's Digital Forms have been used to replace the paper forms the organisation used for passing credit card information between its customer care and donor data entry teams. With EzeScan no credit card data is stored locally, everything is handled by Token Payments using a secure seamless process. Storing of credit card data is encrypted and securely stored by the merchant vault. Tokenising credit cards is necessary to comply with PCI DSS. Various supporter correspondence with students has also been digitised.

In October 2019, The Smith Family saved 55 hours in processing time by using EzeScan Digital Forms for its Christmas gifts. This resulted in \$48,000 in gross revenue (\$7,500 in net revenue) and there was a 30% uptake (form completion from emails sent).

From late March, The Smith Family began using EzeScan's Digital Forms for birthday packs. Hilellis estimates that if just 30% of supporters switch online, it will result in an additional saving of 220 hours per year in processing time, a \$6,000 postage cost saving and \$50,000 in net revenue.



That's a huge saving on resourcing, volunteer hours, paid staff costs and enables us to focus on doing other work.

Suzanne Hilellis, Product Owner of Supporter Squad at The Smith Family



But perhaps the most important net result for The Smith Family is that it has freed up more funds and resources to allocate to the thing that matters most, helping students in need.



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