

Boys Town BBCRM Solution Increases Automatic Donation Processing to 82%



“Thanks to Omatic’s integration for Blackbaud CRM, we are now able to process the millions of pieces of mail we receive annually with donations. This automated solution has expedited the follow-up process, thereby increasing donor affinity which allows for a greater stewardship plan. It would not be possible otherwise!”

– Lisa Hukill,
Associate VP of Development,
Boys Town



THE CHALLENGE

The team at Boys Town needed to integrate BBCRM and their direct mail scanning system to create a system that would streamline donor validation and track donations accurately.

THE SOLUTION

Omatic’s custom integration system now imports lockbox data into BBCRM with custom logic specifically defined by Boys Town, ensuring accurate data mapping.

THE RESULTS

Boys Town is now processing an amazing 82% of all donations automatically. They gained 10-15% more efficiency and noticeably decreased operational costs.

For nearly 100 years, Boys Town has given at-risk children and families the hope, support, and tools they need to end the cycle of poverty, addiction, and violence. Boys Town firmly believes that regardless of background and circumstances, every child and every family has the potential to thrive. Boys Town prepares children and families for successful futures as productive members of their communities.

THE CHALLENGE

Prior to Blackbaud CRM (BBCRM), Boys Town’s in-house donor relations team was effectively processing millions of donations received by mail on an annual basis. Upon converting to BBCRM, Boys Town struggled with translating their already effective direct mail processing program into an efficient process using BBCRM’s batch functionality.

Boys Town needed to integrate BBCRM and their direct mail electronic scanning system. It had to be a solution that would streamline

donor validation, apply a donation as a gift to the donor record, and ensure that donations were being tracked to the appropriate funds. Faced with a unique set of requirements, translating this process to batch would be cumbersome and ineffective. In fact, using the CRM's standard batch processing would surely have increased their cost to raise a dollar. Boys Town quickly determined that a solution was needed to extend BBCRM functionality in order to properly satisfy their processing needs.

THE SOLUTION

When Boys Town came to Omatic looking for a solution they knew that whatever partner they chose would have to insure that the requirements were fully assessed and translated into a custom integration solution that extends BBCRM functionality for optimal direct mail processing time. Omatic's custom integration solution works by importing lockbox data into BBCRM with custom logic specifically defined by Boys Town. The lockbox processing import logic ensures accurate data mapping into BBCRM. It also sends donations to a queue for review based on Boys Town's assessment criteria.

When the import occurs, each donation gets matched to a constituent based on finder ID. If the donation does not match to an existing constituent, but the donor is on an acquisition list, Omatic's integration adds the acquisition record as a constituent. Omatic's solution also simplifies the donation review process with a custom lockbox data processing screen. The processing screen is customized for Boys Town's reviewing needs and includes both the front and back view of checks, an envelope scan, and any additional notes that may have been scanned.

Side-by-side viewing panes provide a robust view of all donor information for quick and easy review. From this customized processing screen, the donor relations team can also navigate to solicit codes, a constituent profile, and more. When the review is complete, Omatic's integration commits the donations to the constituents' records.

"Omatic's staff acquires our ideas for improvements and is able to implement them in a quick and proficient manner. This allows us to continue giving our donors the most expedient and professional service possible." –CASSI MOSSBURGH, DONOR RELATIONS MANAGER, BOYS TOWN

THE RESULTS

Before moving to BBCRM, Boys Town was operating at a respectable rate, processing 70% to 72% of donations automatically without needing manual review. Since deploying Omatic's integration solution for BBCRM, Boys Town is now processing an amazing 82% of all donations automatically.

Today, Boys Town is only reviewing 18% of donations manually, having gained almost 10-15% more efficiency. When translated to millions of pieces of mail received annually, this new efficiency creates far-reaching operational benefits—along with substantial cost savings. The donor services department can now close at the same time as the finance department, while reconciliation with their financial systems happens live in BBCRM. In addition, following up with donors has gotten that much quicker!