The Computerworld Honors Program

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Final Copy of Case Study

Status:
Laureate

Year:
2013

Organization Name:
The Smith Family

Organization URL:
http://www.thesmithfamily.com.au/site/page.cfm

Project Name:
Learning for Life

Please select the category in which you are submitting your entry:
Human Services

Please provide an overview of the nominated project. Describe the problem it was intended to solve, the technology or approach used, how it was innovative and any technical or other challenges that had to be overcome for successful implementation and adoption. (In 300 words or less.)

The Smith Family believes every child deserves a chance, no matter their financial or socio-economic circumstances. The organization supports Australian children to create better futures for themselves and break the cycle of disadvantage through supporting their participation in education. In the 2010-11 financial year, The Smith Family helped more than 117,000 disadvantaged children and their families in 97 communities, through programs including financial scholarships for education essentials, learning support and mentoring programs. With 605,000 Australian children living in jobless families, the need for support is great. Over the next five years The Smith Family's goals are to increase the effectiveness and reach of its programs, significantly escalate the

number of children it helps and in turn grow its supporter base. Having set this goal, The Smith Family's management team realized its existing IT infrastructure could not support the organization in achieving it. They were using two disconnected CRM systems to manage fundraising and program delivery. Because donor and sponsor details were stored in one system and student details in another, it was impossible for managers to get a consolidated view of issues affecting organization performance. The ability to efficiently analyze data was also compromised as a result. The organization wanted to match students with sponsors more efficiently at the beginning of each school year. The lack of data analysis and reporting capabilities also hindered The Smith Family's performance-based culture, as managers couldn't easily produce integrated reports on staff performance. It is estimated that the poor performance of the two CRM systems equated to substantial lost productivity every year.

When was this project implemented or last updated? (Please specify month and year.) Has it incorporated new technologies and/or other innovations since its initial deployment? (In 300 words or less.)

Microsoft Dynamics AX went live in November 2010; Dynamics CRM 2011 followed in October 2011. This technology was very new to The Smith Family as their former CRM systems didn't provide them with a holistic view of their student and donor programs.

Is implementation of the project complete? If no, please describe the project's phases and which phase the project is now in. (In 300 words or less.)

The implementation project of Microsoft Dynamics CRM is complete. Although it was implemented in October 2011, it is instrumental in The Smith Family's long-term ambitions. Currently they are working with their IT partner to improve supporter engagement. Their goal is to provide online account management capabilities for donors and corporate partners. They are also planning to broaden its campaign activities to include social media, and to improve its marketing and communication materials. With Microsoft Dynamics CRM, the organization can produce more targeted and personalized collateral. CRM has adapted to their changing needs and will help them for a long time to come. They expect to provide a continually improving service to donors and the students they help, as they explore the system's capabilities.

Please provide at least one example of how the technology project has benefited a specific individual or organization. Feel free to include personal quotes from individuals who have directly benefited from the work. (In 300 words or less.)

The CRM system has given time back to the Learning for Life workers so that they can spend more time directly with students and families, rather than on administration. This has allowed them to reach 106,061 families in 2011-2012 and increase their sponsorship retention rates by 3%. Microsoft Dynamics CRM is also helping The Smith Family more effectively find available sponsors for students and match volunteers with appropriate positions. Having a unified view of sponsors' and students' details helps match them up to ensure all sponsorships are funded and the program doesn't have to cover the shortfall. Ultimately, it all leads to The Smith family being able to help more children and provide them with more consistent support. "With more efficient system support, we're better able minimize our administrative costs, and can allocate more money to our student programs," says Ishbel Sterrick, CFO, The Smith Family.

Would this project be considered an innovation, a best practice or other notable advancement that could be adopted by or tailored for other organizations and uses? If yes, please describe that here. (In 300 words or less.)

This project is one that could be adopted and tailored for other organizations and uses. The organization uses Dynamics CRM for its educational support program, Learning for Life, which can and is used by other educational facilities, not for profit agencies and mentoring programs. The Learning for Life program supports disadvantaged children and young people all the way through their education, from pre-school and primary school, to senior school and on to tertiary studies if they choose. This holistic, long term support gives young Australians the assistance they need to develop vital life skills, stay engaged in their education and have the best chance to realize their potential. The Smith Family staff use CRM to coordinate the program, maintain supporter data and manage volunteers, as well as to support fundraising campaigns and appeals. Each month, donations recorded in Dynamics CRM are uploaded into the Dynamics AX financial system. The Smith Family also uses the CRM system to allocate sponsors to students, manage corporate contracts and record correspondence with supporters and students and is now planning to bring its other programs onto Dynamics CRM.