



Case Study

AACD

Customer service, Sales



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Project scope and business needs

Since 1950, the AACD - Association of Assistance to Disabled Children is a private nonprofit institution. Reference treating people with high complexity disabilities, AACD has become a center of excellence for doctors, therapists, and teachers, having more than 2.000 collaborators and thousands of volunteers.

Besides that, the Institution owns AACD Diagnosis, the Medical Center and the Therapy Center, that complement its infrastructure, assuring quality and excellence for public or private health plan customers. The investment in these areas is a solution to revert the crisis scenario that directly impacted the donation amount received in the last years. To keep this structure, the AACD budget is composed by the revenue generated through partnerships, product sales on thrift stores, donations by legal and natural individuals, from Teleton collections, from AACD Hospital, from particular exams and through health plans, and also from product licensing with the AACD brand.

Microsoft donated the required licenses to AACD. AlfaPeople was in charge of implementing the system, donating hundreds of hours of consulting, so the project could be delivered. The project consists of unifying the operation of the Fund Raising areas in a single system, creating a solid donators database (legal and natural individual

donators), where is possible to get the centralized history of interactions of each area with the donators, creating opportunities to increase donations and improving the well-being of more children. To be successful at this implementation, AlfaPeople used its project methodology to control phases, change management, best practices, and risk evaluation.

All fundraising was decentralized, with each area with its own contact database and collection history, making very hard to identify which channels a specific donator had used, resulting in redundant approaches and showing some lack of control in the process.

AACD was looking for a relationship system to centralize the databases, organize donators information, donation history and also to create a 360° view of interactions and the consolidation of collected amounts by donator and responsible area.

Some additional features of the Microsoft 365 platform would help other needs of AACD, like the workflow and alert tools, that would provide task automation in the acquisition process. The Dashboard feature was greatly welcomed, as it would provide a more precise and on-line vision of results by acquisition channel and area.

Another important need was to maximize the work of collaborators and individuals. Counting with an integrated system of easy use, intuitiveness and flexibility was the base of an improved fund raising process.

The main challenge during the implementation was mobilizing the project team. At AACD, the reduced team and the many daily activities were the main challenges. At AlfaPeople, besides the hours offered without cost by the company, an internal campaign was made to stimulate professionals to donate additional hours to the project outside their work hours.

Solutions

AACD used Microsoft Dynamics 365 to: centralize the donator database for all fund raising areas, improve the relationship management of donators, trigger e-mail marketing campaigns to attract more resources, and generate reports and dashboards for operational and strategic monitoring.

Many indicators were created, with emphasis on funds summary by donator. With the Dynamics CRM campaign module, AACD identifies and captures new donators, increasing donations. Donators requests have special attention with the Service module, where all requests are registered and serviced. The sales module makes easier to manage donators, taking care of tasks like invoice management. AACD is experiencing great improvements in its management tasks with Microsoft Dynamics 365. The use of the platform will also greatly benefit thrift stores, volunteers and other AACD departments, enriching even further the database and centralizing all information in a single place.

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Benefits



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Unification of the fund raising areas.

Allows a 360° view of the funds raised by area and segment, including legal and natural individuals.

View of activity history and campaign actions.

Campaign replies serve as performance indicators of the campaign performance, allowing the user to analyze if the campaign should continue and how future campaigns should be handled. Positive campaign replies become fund raising resources for AACD.

Internal processes agility

With the native features of Microsoft Dynamics 365, AACD team’s internal processes became more agile and areas gained synergy. This means the perpetuation and amplification of its activities, reaching more families and children that need this support and technical competency.

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