



Success Story



Key to our success is fundraising, BrightGen worked quickly and efficiently to allow us to receive and process payments more effectively."

Assistant Director
Barnardo's

The challenge

- Create a single supporter view, capturing all supporter details and interactions in one place
- Complex data rationalisation and migration
- Decommission legacy fundraising platform

The solution

- Customised Salesforce Sales Cloud, built on the Nonprofit Starter Pack
- Custom-built Direct Debit and Gift Aid solutions

The results

- Improved efficiency of fundraising activity
- Increased voluntary income due to more efficient processing
- More targeted marketing activity and improved marketing ROI

The company

Barnardo's is a British charity which aims to transform the lives of the most vulnerable children and young people across the UK through the work of their services, campaigning and research expertise. As one of the UK's leading children's charities, Barnardo's works directly with over 200,000 children, young people and their families every year and relies on fundraising to support as many children as possible.

The challenge

Barnardo's supporter information was being managed on a legacy system that had been operational since 1990. It contained 3.8 million account, contact and financial records. Used to process donations from the Barnardo's website and central to their sales and marketing activity, the system was inefficient and slow, required specialist IT support and was no longer considered fit for purpose. Barnardo's wanted to lead the market and create a single supporter view, capturing all supporter details and interactions in a supporter-centric CRM.

Barnardo's had already identified Salesforce as their cloud solution and had selected an implementation partner. The programme encountered a number of challenges and a change of technical ownership was recommended by a review board. BrightGen were initially engaged to review and manage the data migration. Over time, BrightGen took an ever-increasing role in the development of the solution and were eventually asked to run the entire change programme.



*Improved
up-selling &
retention*

The solution

BrightGen worked with Barnardo's to understand their business challenges and built upon the original design to ensure the day-to-day fundraising and financial processes were supported in a more efficient way. BrightGen built customised Direct Debit and Gift Aid solutions and enabled the platform to interpret and load supporter data from third-party fundraising agencies.

A crucial part of the programme was the data migration, which consisted of almost 50 million rows of data, the majority of which were loaded in three days. Active supporter information needed to be mapped from a number of sources into a consolidated Salesforce record, to give a comprehensive history of related organisations, campaigns, appeals, income, committed gifts, gift aid declarations, affiliations, notes and cases. Reconciliation reports were created to confirm the success of the migration.

The result

With a complete, single view of all contacts Barnardo's is now better equipped to manage its supporters more effectively and has improved the overall efficiency of its UK fundraising activity. In addition, Gift Aid Claims can now be successfully processed using the new system.

Within months of taking on the project, BrightGen rolled Salesforce out to over 20 fundraising and finance departments at Barnardo's. Teams now have access to better dashboards and reporting, improving the visibility and clarity of supporter information and helping to increase cross-selling, up-selling and retention. In addition, Barnardo's have been able to execute more targeted direct marketing campaigns reducing expenditure and improving ROI.

BrightGen continues to work with Barnardo's on a number of projects and supports them on an ongoing basis as a Service Management partner.



Without the help of the BrightGen team, the Barnardo's CRM delivery would have failed."

Assistant Director
Barnardo's



*More
efficient
fundraising
activity*

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