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Scripture
Union

Scripture Union

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Scripture Union (SU) is a non-denominational Christian charity which seeks to create opportunities for children and young people to explore the Bible and grow in their faith.

The charity was established 150 years ago and is now a global movement active in over 120 countries. SU is also known as a publishing house, producing quarterly subscription magazines, free and chargeable downloadable resources, and products which can be purchased from the online shop on the SU website, and through retailers offline and online.

totalenterprisesolutions.co.uk

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The Challenge

In September 2020, SU issued an ITT for the replacement of their incumbent CRM platform as it was lacking a long-term technology roadmap that could underpin SU's organisational strategy, with an imminent end of life date for the platform presenting a further risk to future operational stability.

SU wanted a partner and solution that could support their aim for digital transformation across the organisation; simplifying processes, enabling better engagement, and delivering more tailored and personalised communications, helping SU to be smarter and more cost-effective in its outreach work. After a successful tender process, TES were invited to contract with SU to deliver the new CRM system using Microsoft Dynamics 365 (D365), helping SU meet its digital transformation objectives.

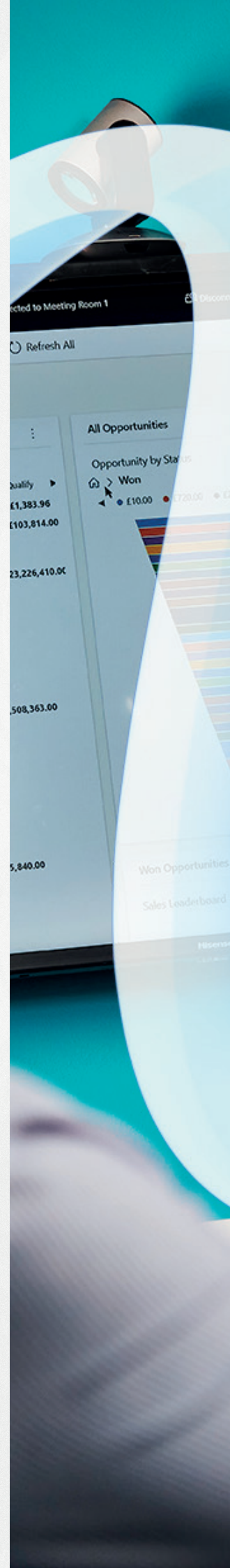
Background

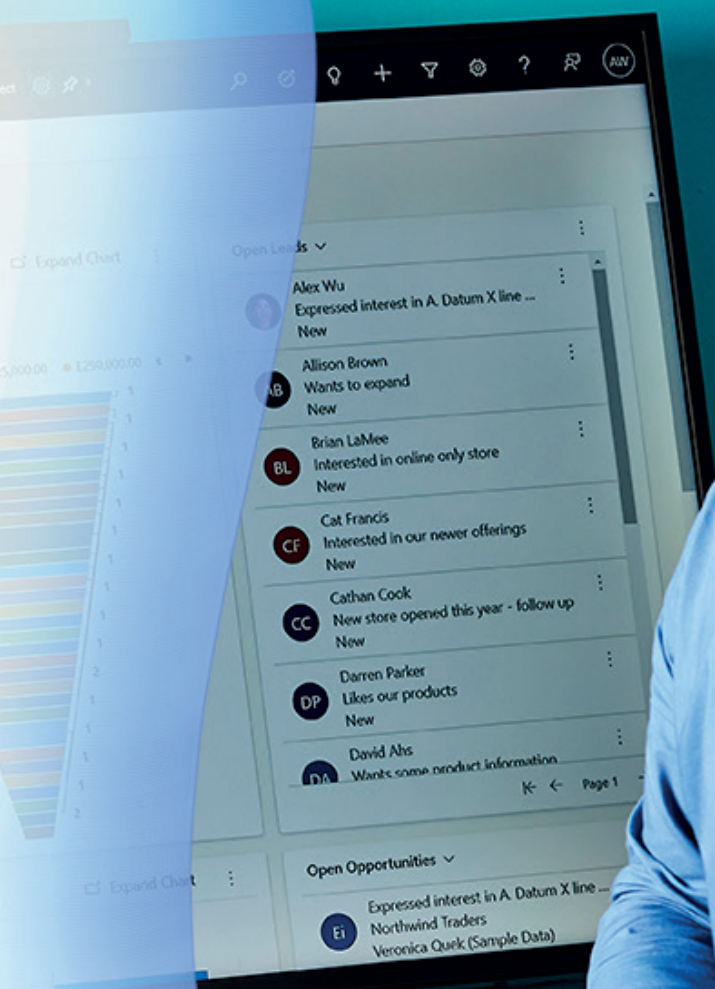
SU works to mobilise volunteers, partners and supporters, with a mission to reach the estimated 95% of young people who are not part of a church. The charity has a network of approximately 20,000 volunteers who run holidays and events for children, young people and families.

There are 5 regional teams who work in partnership with local churches, charities, schools and other organisations to provide training and guidance to support them in their own outreach work and events.

Challenges faced within SU included:

- Staff spending a large amount of their time troubleshooting and navigating through manual processes to complete key tasks such as processing donations, Gift Aid and managing subscriptions
- Lack of automated integration between systems, including its finance platform, website, and 3rd party platforms for managing holidays and volunteers
- No single source of truth with valuable information generated through stakeholder engagement not being captured on the existing CRM
- Lack of self-service for staff as they relied on tailored program queries and support for building reports, further hindered by a clunky user interface
- Lack of self-service for supporters as they were unable to view past and current transactions, with a limited ability to manage their profile and communication settings.





Pictured:
Adam Sheehan

The solution

Over 75% of the D365 CRM functionality delivered was via the combined sector specific, and repeatable capability of Microsoft's Cloud for Non-profit (MC4N) and their NFP Accelerator, and TES' own unique IP.

Building on the benefits of the MC4N and the Power Platform in delivering more for less, the solution implemented by TES heavily utilised the Microsoft NFP Accelerator, combined with the low-code capabilities of the Power Platform.

The combined NFP capability with TES' own predefined IP, expedited the timelines of the project and significantly reduced costs in comparison to a traditional bespoke development lead process.

The solution delivered consisted of:

- 49% Standard Dynamics 365 and NFP Accelerator out-of-the-box capability
- 28% Standard TES pre-defined modules, routines and capability for Charities and NFPs
- 23% Tailored configurations and bespoke customisation

TES' own charity and NFP tailored capability included:



Fundraising, Subscriptions and Events modules



Existing TES interface templates



Customer contact and marketing



Existing integration solutions



Finance management

The Microsoft NFP Accelerator provided the solution foundation, with TES extending the core data structures to meet the specific needs of the project. The Model Driven Power Apps, PowerApp Portals and process automation through Power Automate Cloud Flows underpinning the seven separate portals of the overall solution.

A major part of the project, and key to the success, was the development and integration of two self-serve portals, one for partner organisations, the other for supporter's.

- Regional teams use the partner organisation portal to onboard new partners, and manage existing relationships. This utilises both a model driven app and canvas app while working remotely out on the road. Information gathered during onboarding updates the D365 CRM in real-time, auto-populating all of the new information, removing the need for the previous process for manual uploads.
- With supporters and volunteers being the life blood of the charity the deployment of the Azure B2C supporter's portal enables SU to provide a safe and secure framework on which to provide a range of external facing applications and services.

Core features in providing the portal services that SU constituents could self-serve and interact with when they wanted, and how they wanted included:

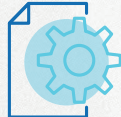
- Integrated donation processing including all payment sources plus in-app payments.
- Integrated order processing for both in-app orders, ecommerce integration and fulfilment.
- Multiple online portals for supporter self-service and operational service delivery.

The Result

Delivering effective programming and accelerating mission outcomes...
The new portal and services available maximise supporter adoption and engagement as well as provide a self-service platform for processes such as subscription renewal; increasing the degree to which constituents can self-service their engagements, and enabling the SU team to focus on activities which can drive and deliver more social impact.



The new CRM implementation has helped SU in meeting a significant core strategic goal for FY20/21, that of "continuing digital transformation: Ensuring transformation of cross-functional, mission enabling systems and processes to underpin organisational growth and efficiency."



The solution has improved processes in support of tracking and categorisation of fundraising income streams, and has fully automated previous manual processes for:

- Profile management and subscription renewal processing, approx. 600+ payments taken within the first month.
- Order processing - with approx. 500 orders taken within the first month.
- Donation income, through automatically uploading directly in to CRM from the wide array of file and API sources, as well as streamlining the income reconciliation process by providing a bank statement import routine.



Use of MS Azure B2C capability has additionally reduced the cost and time in creating constituent facing self-serve portal solutions through the designing and building of bespoke security components being managed by the core Azure capability.

With SU moving to a SaaS platform hosted on Azure, they have also been able to benefit from significant improvements to the security and resilience of the core CRM business function, with SU being able to redirect the internal resources previously allocated to ensuring local operating system patches were up-to-date, and suitable Disaster Recovery and Business Continuity policies.

Mark Green, Digital Transformation Manager, Scripture Union

We wanted a partner who could help SU continue its digital transformation, incorporating more of our mission critical systems and helping us to reduce the risk of legacy systems.

In upgrading our CRM, we knew we had some standard needs common to other charities, such as integrating with JustGiving and GoDonate, but equally we had some requirements and business processes that are unique to SU, including the way we want to positively engage and thank our donors.

We selected D365 and TES based on the broad capability it could offer SU as we continued to adopt new digital ways of working. We are still at the early days of refining the full capability of the solution that is available to us, we've been able to improve key time consuming processes, and are looking forward to delivering more fully on the benefits that the service can offer.



TES will get you there.

Imagine how good you would be at something if you'd done it every day for over 15 years!

TES has developed an extensive understanding of the pains commonly associated with the processes and systems adopted by charities. Long-standing deployment within the sector gives TES a leading edge as a UK Microsoft partner.

The passion for helping NFPs means TES is always on the lookout for ways to improve its own processes so that sector-specific needs can be fulfilled. To quantify this desire for continuous improvement, TES undertakes regular CSAT (Customer Satisfaction) and NPS (Net Promoter Score) surveys.



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