

Business Process Improvements - Efficiency



Asthma Foundation NSW

- 1 in 9 people have asthma
- Asthma Foundation NSW is an independent not-for-profit organisation that relies on community support to positively impact the quality of life of the 800,000 people with asthma in NSW by: changing community attitudes and actions; building knowledge through research and education; advocating needs, and; creating an asthma friendly world.

iMIS since 2000

Core iMIS Modules

- The Foundation had invested in many modules of iMIS, however more than half had never been used, module licensed include:-
 - > Customer
 - > Billing
 - > AR/Cash
 - > Fundraising
 - > Events
 - > iQA
 - > Duplicate Merge Manager
 - > EFT
 - > Informz
 - > iBOs
- Over the 8 years the technology had been maintained however the supporting business processes and staff knowledge had not been maintained.
- **Legacy processes and procedures from 9 years ago were still being used today!**

iMIS since 2000

Strategic Priority

- In late 2008, the Foundation made it a strategic business focus for 2009 to:
 - > Review all business processes – efficient systems
 - > Understand and improve knowledge of iMIS capabilities
 - > Provide staff and users with iMIS training

Business Process Improvements and iMIS!

AR & Finance Integration

Reviewed Process:

All revenue is now processed once - in iMIS! iMIS has been interfaced with the finance package, MYOB using a General Ledger interface.

Product orders and training courses are all managed within iMIS AR/CASH and Events.

iMIS is now the debtor sub-ledger to the MYOB finance package. Allowing for debtor management and income reporting in iMIS.

Gained Efficiencies:

Reduced data entry processing by over 50%.

Integration to MYOB is a 5 minute interface vs a total re-processing.

Removed the additional EFTPOS machine as it was redundant.

Business Process Improvements and iMIS!

Fundraising and Donor Management

Reviewed Process:

Fundraising module and relevant areas of the customer module were completed removed and redeveloped.

All fundraising codes (campaign, appeal and distribution) were restructured and aligned with fundraising efforts.

Receipting was completely redeveloped and incorporated the use of the iMIS receipting system along with customising receipt letters based on the gift that was received.

Fundraising reporting is now seamless and integrated with iMIS via custom Crystal Reports. The Foundation can now run campaign or appeal reports, measure the response rates and cost of appeals.

New automated processes were also established to remove a significant amount of manual data entry that was entered. These were implemented via the use of SQL Stored Procedures.

Credit cards are now processed in real-time and the Rapid Gift Entry is used during appeal times to make processing more efficient and accurate.

Gained Efficiencies:

50% reduction in processing time of fundraising gifts.

Mail segmentation reports are far more accurate, and complete

Increased donor care management

Business Process Improvements and iMIS!

Education and Training

Reviewed Process:

The unused Events module was defined and implemented to support the management of education courses.

Invoices and general ledger accounts were mapped to support the newly integrated MYOB and RTO Education Business Rules.

Automated workflow procedures were established to reduce data entry, managing course administration (certificates, tracking and trainers).

Gained Efficiencies:

Improved reporting capabilities

Reduced data entry and managing separate systems.

Improved debtor management and certificate allocation.

Business Process Improvements and iMIS!

Reporting and Business Decision Making

Reviewed Process:

By the improved data coding structures and end-user knowledge the Foundation was able to define key custom reporting requirements to assist in business decision making. Reports were developed in Crystal Reports and added to iMIS.

Staff are now empowered to access the knowledge from the consumer data to make improved decision in areas of information service delivery, fundraising efforts and education.

Gained Efficiencies:

Remove the licensing costs of SPSS.

Reduction in time and effort of key staff running manual data reports.

Improved consumer/donor relations due to improved knowledge and decision making.

Provision of accurate and consistent information.

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