

Barnabas Foundation

Customer Success Case Study



Barnabas Foundation Creates Exceptional Donor On-boarding and Experience

Since 1976, Barnabas Foundation has helped thousands of generous Christians give more effectively to the churches and ministries close to their hearts. We help people accomplish the greatest good – for their families and for God’s Kingdom – through efficient, tax-wise giving.

Challenge

Barnabas Foundation has helped individuals and families donate more than \$1 billion to churches and ministries. They also partner with 800 congregations and 200 other member ministries in the United States. The non-profit organization is successful, but relationships with potential donors have depended on an outdated on-boarding process fraught with delays and mired in manual operations.

Barnabas Foundation must collect a great deal of information from donors before they can aid them in developing a custom giving strategy they call “The Charitable Legacy Blueprint.” And problems could arise from the very beginning of that process, which had been created years ago. When potential donors inquired, Barnabas employees completed an intake survey over the phone. The next step was mailing donors lengthy questionnaires called “pre-visit worksheets,” that covered donor charity priorities and interests, along with detailed information about their family and finances. Sometimes donors didn’t return the

Product

- Experlogix Document Automation

Benefits

- Streamlined document processes
- Improved document quality
- Improved customer experience

Tech

- SugarCRM

pre-visit worksheets promptly, or the worksheets contained information conflicting with the data collected from the intake survey. Barnabas Foundation had to allocate resources to follow up with donors, prompting them to complete the pre-visit worksheet or resolve data discrepancies.

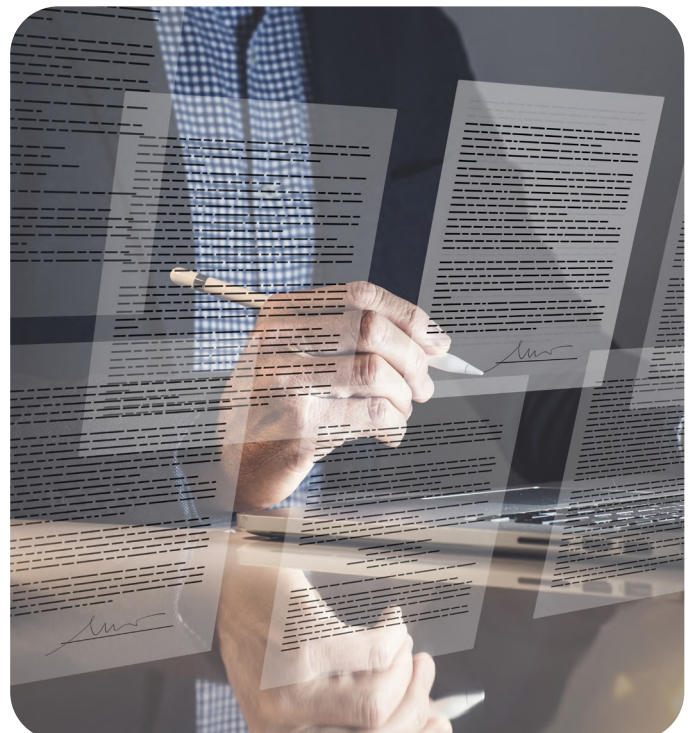
Once donors mailed in their completed pre-visit worksheets, Barnabas employees used the supplied information to produce the Blueprint – which served as a legal agreement specifying the terms of the donations. They created the document by copying and pasting relevant sections from a 50-page master document. Before the organization could implement a giving plan, donors had their private attorneys review the proposed agreement. If attorneys found mistakes or didn't understand the Blueprint, progress bogged down again while Barnabas Foundation answered questions, made modifications, or corrected errors. The document didn't convey the professional image appropriate for a plan that has such an impact on donors, their heirs and the charities they wish to support.

The foundation recognized they needed to modernize their on-boarding process, all while addressing the consistency and accuracy of the Blueprint. These were the initial objectives for Barnabas Foundation when they sought an automated solution to these challenges and were introduced to Experlogix.

Solution

Time for On-boarding Modernization

Its seamless integration with SugarCRM – a must-have requirement for the non-profit organization – made Experlogix the obvious choice. But it wasn't until the Experlogix team showed Barnabas Foundation the Smart Forms and Smart Flows features that the true value of the Experlogix solution became clear. Many of the challenges that made it difficult to create consistent, accurate Blueprints occurred earlier in the on-boarding workflow. Automating the data collection and manual transcription steps with Experlogix would not only enable the desired improvements in the document, they would also accelerate and streamline the donor journey, from initial inquiry to finished financial plan.



Working closely with Experlogix, the Barnabas Foundation team defined and created a digital Smart Form version of the pre-visit worksheet. Now, instead of receiving a generic paper document they must complete by hand, donors access the Experlogix Smart Form via a secure website. The form is pre-populated with data from Sugar, eliminating the need to collect the same information twice. Discrepancies between existing and new data have disappeared. Besides pre-populated fields, the form is easier for donors to complete because it expands or contracts to include only the relevant information; the form only displays input fields about a spouse if the donor has indicated they are married, for example. Once donors submit the form, Experlogix's Smart Flows component uploads the provided information to SugarCRM, and automatically generates the Blueprint and other donor communications.

Consistency, Accuracy and Professional Appearance

As a result of this simplified, streamlined on-boarding process, the Blueprint has been greatly improved. By leveraging Experlogix's template design capabilities built-in Microsoft Word, Barnabas Foundation employees were spared from learning a new document composition software and were able to use their existing skills to easily create a sophisticated and compelling Blueprint template, connected to their SugarCRM system. Copying and pasting paragraphs from a master document are a thing of the past. Now the foundation presents donors with comprehensive, professional-looking financial plans that are highly personalized with accurate data and consistent across the organization.



“The Experlogix Document Automation Smart Forms was a game-changer for us. It can trim weeks off the donor on-boarding timeline.”

John Short

Project Manager

Result

Barnabas Foundation was interested in reducing friction at the beginning of the donor experience and the Experlogix solution for SugarCRM – with its Smart Forms and Smart Flows features – enabled them to implement the modern, streamlined donor on-boarding process they were looking for. Duplicate data entry is no longer required, nor is it necessary to manually transfer data from paper forms to the Sugar system; these tasks are fully digitized and automated. The non-profit organization has trimmed days from their on-boarding workflow as they eliminated the need to send paper pre-visit worksheets or wait for their return via mail.

As with any inefficient business process, delays and obstacles can discourage enthusiastic participants. Soon after implementing the new on-boarding process, Barnabas Foundation noticed an improvement in the average time it takes for donors to go through the steps. The organization have addressed the underlying challenges that were making it cumbersome to get potential donors from the start of the process to the finish; a simplified and automated way to compile information and create a donation plan is essential in providing an exceptional donor experience and, ultimately, fostering growth.

The appearance of the Blueprint and the accuracy of the data have also contributed to the foundation's success. The look of such an important document matters; donors are considering financial decisions that affect their immediate families, churches, and future generations. An attractive, accurate and easily understood Blueprint bolsters confidence in Barnabas Foundation's financial planning guidance.

Mr. Short has made positive comments about working with Experlogix, highlighting the team's responsiveness to questions or problems, fast product implementation, quality of training, and willingness to help. "They make us feel that we are their only customer."

Looking ahead, Barnabas Foundation believes they can expand operations to support members associated with a wider range of religious institutions. The organization is also beginning to use Experlogix to facilitate their membership proposal and assessment process – another factor that will allow them to sign and vet more members. As membership grows, so does the pool of potential donors who can take advantage of the financial planning advice provided by Barnabas Foundation.

Want to learn more?

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