

AUTOMATED PROCESSES HELP A MAJOR UNIVERSITY STRENGTHEN RELATIONSHIPS WITH DONORS

The Office of Advancement Services (OAS) digitized workflows and integrated them with DocuWare to facilitate thousands of transactions with key donors

- ✓ frevvo forms were a key to modernizing development recordkeeping.
- ✓ Online forms and workflows streamline processes for offices across the globe.
- ✓ Integration with email and business systems provides automation that saves time and prevents errors.

Customer Profile

The Office of Advancement Services (OAS) for one well known, international university supports the development teams who drive philanthropy for the university's mission, *"to educate its students and cultivate their capacity for lifelong learning, to foster independent and original research, and to bring the benefits of discovery to the world."* One of their tasks is to move documents, like donor files, and business processes into a digital format.

Business Situation

The university has many development offices spread across the globe, and handles over 100,000 transactions each year. Processing transactions on paper and by mail could take a week or more, and was prone to error. The OAS chose **frevvo** forms to streamline development office processes and integrate with existing document management systems, like DocuWare.

"Our users are very happy with the automation – it's easy to use and saves them time. They love it."

Content Services Manager

Solution Summary

The university's OAS has used **frevvo** for many years, and has implemented a variety of forms to modernize their processes. One example, a donor communication update form, is available to users on the OAS intranet. **frevvo**-Active Directory integration secures and protects the ability to update donor information. Form submissions are automatically emailed to their service desk system and update the donor database. The donor's record is updated instantly, and any future communications honor their requests. This easy and reliable process helps maintain strong donor relationships. Form submissions are automatically saved to DocuWare, making them easy to index and search.

Key Features

1. Documents are automatically stored in DocuWare.
2. OAS has been able to easily and quickly convert paper processes to digital workflows using **frevvo**'s drag-and-drop designers.
3. Active Directory integration provides user management and login via existing credentials for enhanced security and ease of use.

Benefits

1. Digital processes ensure data is easy to track and documents are consistently filed.
2. **frevvo** forms are faster and more efficient than paper for processing hundreds of daily transactions.
3. Integration connects forms to back-end systems seamlessly.

For the OAS, implementing **frevvo** forms has resulted in swift processing time and a unified way of storing records. The OAS receives regular requests to automate processes for the development offices they support. Using **frevvo** software and integration tools to connect to their databases and document management system is key to rapidly implementing user-friendly digital workflows for their customers.