Optix leads to donation savings and better donor experience

About Heifer International

For more than 70 years, Heifer International has provided livestock and environmentally sound agricultural training to improve the lives of those who struggle daily for reliable sources of food and income. Heifer is currently working in 30 countries, including the United States, to help families and communities become more self-reliant.

Legacy Operations

Prior to automation with Optix, Heifer processed donations manually by grouping documents into batches, totaling donation amounts, copying each document, labeling and stuffing manila envelopes by batch, and then placing on carts and delivering to data entry staff. Operators would then manually perform data entry for each donation in a batch by entering numerous data fields into Heifer's CRM.

Optix Solution

Mindwrap created several custom utilities that maintained the concept and naming conventions for Heifer batches while allowing all donation documents to be scanned to a dynamically created folder on a central Optix Server. This folder of scanned batch documents is then placed into an Optix Workflow that automatically routes batches to data entry personnel.

During the indexing operation, each donor document is automatically retrieved and displayed along with a custom indexing screen that records donor and donation information automatically retrieved from Heifer's legacy database. Once indexing is completed, a textual file containing all donation records for the batch is automatically created and transmitted to Heifer's CRM.

Because all donation documents received are indexed into a repository on the Optix Server, documents can be found, retrieved and viewed in seconds. This enables donor services to respond quickly to donor inquiries and helps to cultivate close relationships with the generous communities that fund Heifer's vital mission.

Future plans call for Heifer to further automate donation processing using Optix capabilities to perform OCR and recognize MICR codes on donor checks. This will increase the speed of the financial transaction and improve business cash flow.

"Our Optix system empowers Heifer to focus on our donor relationships. Using the power of Optix document scanning, indexing, storage, retrieval and workflow, we are able to more efficiently process donations, manage our information, and handle requests. Improving efficiency and effectiveness allows more of our donor resources to be used in our mission of ending hunger and poverty enabling us to create new opportunities and improve the livelihoods of our participants in the U.S. and worldwide."

- Stephanie Chesher, Senior Director of Donor Services & Operations, Heifer International

Benefits

By selecting and deploying Optix, Heifer has realized many important benefits:

- Scanning all donation documents using Optix Capture Tasks eliminated the costs for paper, copying, ink, manila envelopes, warehousing and storage.
- Automating donation processing using Optix Workflow resulted in a 40% increase in productivity and elimination of lost or misplaced physical paper documents.
- Because donor documents can be retrieved and viewed in seconds, customer service and donor relationships are greatly enhanced.
- Labor costs to perform donation processing were reduced.
- Automation of data transfer to CRM improved overall system accuracy and reliability.
- Use of custom batch utilities allowed Heifer to maintain existing donation classification and throughput models that in turn enhanced system understanding and acceptance by end users.
- Increased throughput efficiencies have allowed Heifer to reduce reliance on outside vendors to help with donation processing.

About Mindwrap

Since 1988, Optix® Document Management and Workflow Systems from Mindwrap, Inc. has helped Government, Education, and Commercial clients leverage information and automate business processes. Available for Mac OSX , Windows, Unix, Linux, Windows, and Mac OS X servers, with native Macintosh and Windows clients. Supports Oracle, MS SQL Server, and other major relational database management systems.

We encourage you to make a donation:

Visit the Heifer International website at www.heifer.org or call 888.5HUNGER (888.548.6437).