



# Building smart non-profits with automation

An ebook that discusses why automation is important and how it can bring more value-add for non-profits





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# Introduction

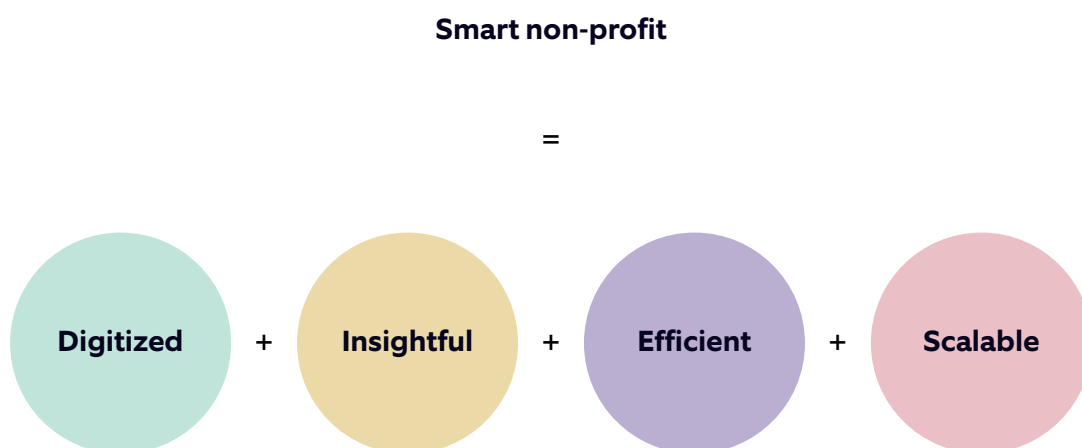




# Non-profits in the new hybrid world

Today, non-profit organizations face new obstacles ranging from reduced fundraising and difficulty in staying connected with beneficiaries, to challenges of managing teams and engaging volunteers and staff working remotely.

Automation, an amalgamation of integration tools, bots, AI, and related technologies, helps in accelerated time to market by improving operational efficiencies, building connected systems, & allowing better engagement of staff. In this ebook, we aim to explore the key benefits of incorporating automation in non-profits and understand whether automation can solve the current key challenges that non-profits are facing.





# Why automation for non-profits?





# Business challenges

## Resources barrier

Budget restrictions, limited manpower, operational inefficiencies, and the race against time are key challenges that non-profits face while progressing toward their life-altering missions.

## Keeping up with the hybrid world

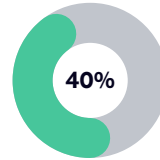
Non-profits are witnessing new challenges and are looking for new and better ways to access resources, fundraise, and run operations while responding to the new hybrid world post covid.

## Staff management issues

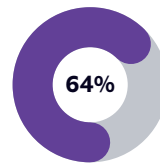
Engagement challenge is regularly cited as a pain area for non-profits. Issues such as recruiting volunteers, change management in the uncertainty of COVID, and staff supervision have seen volatile shifts compared to past years.

## Scaling-up challenges

In their early stages, non-profits adopt technology as a utility for sustenance. As they grow, the time and effort required to execute their routine, redundant tasks significantly surpass the capacity to support their mission activities.

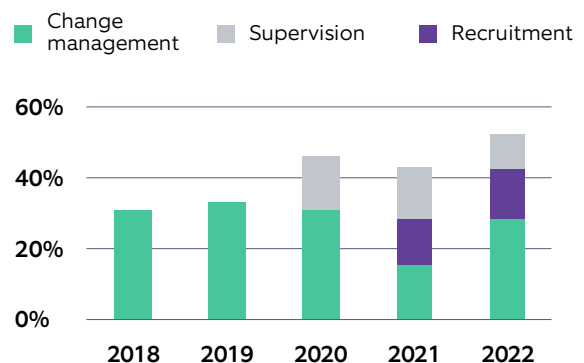


of non-profits report that lack of resources is a key challenge



of non-profits want to invest in new technology but have budget constraints as stakeholders are interested only in investing directly in missions

## Top issue reported by volunteer managers



### Sources:

NonProfitPRO: 2021 Non-profit Leadership Impact Survey  
VolunteerPro: 2023 Volunteer Management Progress Report Survey



## **Burning questions faced by non-profits today**



How to scale impact?



How to engage better with constituents?



How to reduce operational costs?



How to create insights that would provide new opportunities?



How to keep systems & teams connected?



# Basic building blocks for non-profits

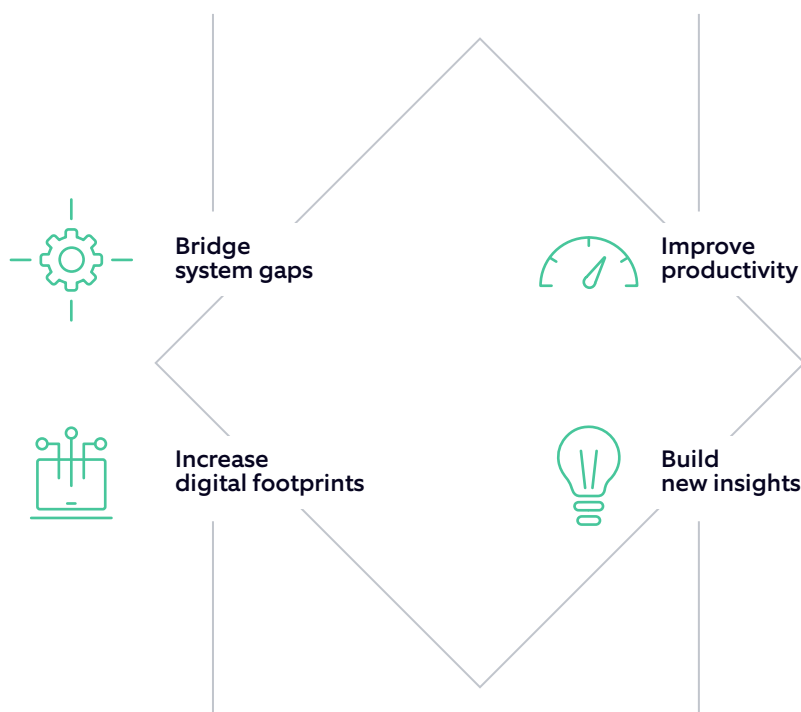
*Use cases to be considered while planning for adopting automation in non-profits*

## Integration technologies & BPMs helps build connected systems & people.

- " Real-time sync & integrated CRM campaign management solution ensuring actionable insights are available to plan and act.
- " Workflow-based request fulfillment system improves agility, accountability, & transparency.
- " A connected volunteering workflow ensures a seamless experience for the volunteer.

## RPAs, bots & AI/ML solutions automate various human tasks/processes, allowing the organization to spend more time creating impact.

- " Intelligent image/documents processing & classifications of thousands of files saves hundreds of hours for staff.
- " Automated personalized regular impact reporting to donors helps increase their trust, improving donor retention and average gift size.



## Low code & bpm platforms enable rapid and low-cost solutions to improve ground-level digital transformation.

- " Fundraising & other events are managed efficiently under one roof by using an event app for staff attendance and all event-related activities.
- " Monitoring, survey, or reporting app used to capture audit and compliance details from field workers improves data availability and accuracy and creates possibilities to generate dashboards/insights.

## AI/ML, computer vision, and advanced analytics create immense opportunities to generate new insights.

- " Automated document research, like grant requests generates actionable insights.
- " Intelligent prediction of the fundraising campaign can be done using text analysis on CRM notes and historic donation patterns.
- " Quick and automated matching of the right set of volunteers for events helps assist volunteer managers.





# Examples of smart automation solutions implemented by non-profits worldwide

## **ONCE Spain: Implementing complex automation**

ONCE brings efficiency and effectiveness to its complex operations via automation using UiPath, saving 46k hours since 2018.



## **Buttle UK: Understanding text data to help disadvantaged families**

Buttle UK uses ML to find patterns in text data better to understand the shared experiences of vulnerable families and youth.



## **Boys Town: Integrated BBCRM**

Boys Town BBCRM solution increases automatic donation processing by 82%.



## **Action for children: Digital transformation**

Action for Children delivers its digital transformation strategy on Mendix.



## **Netherlands Red Cross: Volunteer mobile app**

Netherlands Red Cross deploys mobile app with OutSystems to scale volunteerism.





# Benefits of leveraging automation solutions



## More time for the core mission

Improved operational efficiency helps redirect funds and human resources towards making more impact for the cause and better connecting with stakeholders/donors.



## 360° view of insights

With integrated CRM, marketing & accounting solutions, real-time data is available for reporting dashboards & operational purposes.



## Ready for change on their own

From COVID-19, political unrest to climate change, organizations are constantly pursuing new expectations, and automation brings future-ready agile solutions that they can quickly implement with little learnings.



## Easy strategizing and scaling

With informed decisions and better predictability, it's easy to increase impact by expanding services from regional to national or even global levels.



## Motivated staff

Intelligent automation strips away the dull and mundane, paving the way for more engaging work and learning for staff, helping increase staff retention and productivity.



## Better opportunities

Discovering new opportunities based on deeper, intelligent insights becomes a reality that is otherwise impossible to comprehend through human efforts.



# How to adopt automation for non-profits?

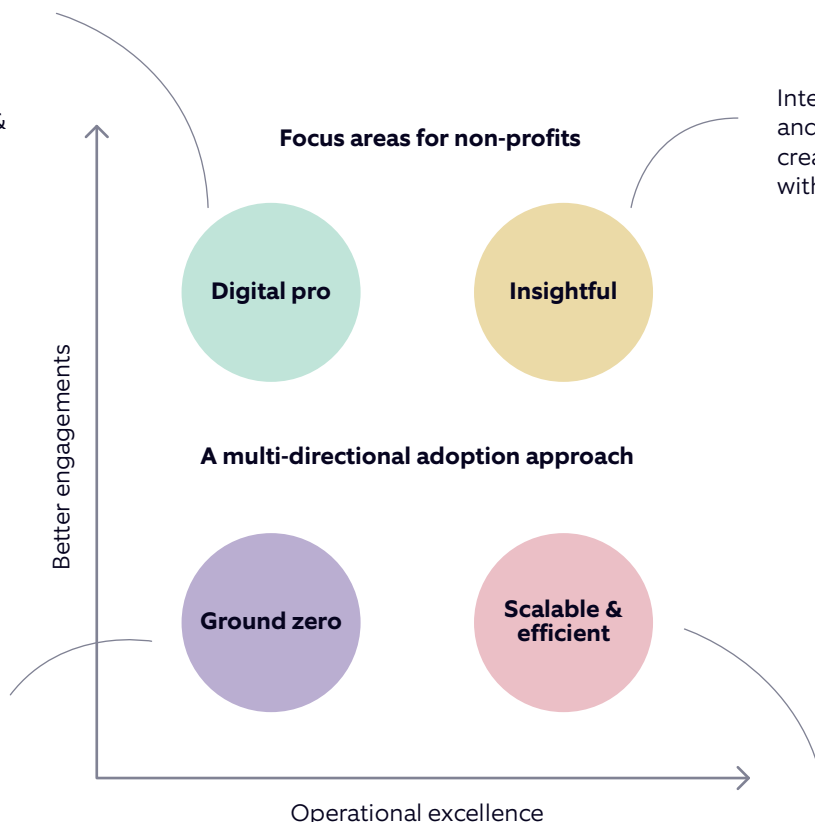




# A multi-directional adoption approach

*Leveraging automation technologies in multiple directions at the same time to realize significant benefits*

Best-in class digital experience is the paramount need for field teams, partners, and beneficiaries and helps in better engagement, facilitating availability of quality digital data, removing entry barriers, & building trust.



Integrating data, analytics, and predictive intelligence creates new opportunities with new insights.

Minimum technology investment is needed for website, CRM, marketing solutions, emails, and other communication to sustain the operations and meet compliances.

*Leveraging automation for becoming smarter non-profits*

Smart automation frees staff to engage in more valued outcomes, improving operational efficiencies and scalability.



# The 5-step implementation process

*A step-by-step business-focused process to realize automation solutions end-to-end*



## **Discover:**

Attend workshops and deep-dive sessions to comprehend automation needs better.



## **Plan and define:**

Sketch a blueprint, identify scope, understand prioritization and define expected results. Also, baseline the current digital maturity.



## **Select tools and technologies:**

Identify a few initial tools & technologies to invest in to ensure alignment with existing IT infrastructure.



## **Execute and adopt:**

Roll out changes in a phased manner by addressing basic requirements and extending further iteratively. Upskill staff; train them on implementation & technologies.



## **Measure and learn:**

Measure the success of the implementation using metrics, KPIs, reports, and statistics. Analyze the results and adapt accordingly.

Review & feedback  
implementation



# What works and what doesn't

*Tips and tricks to get you through automation seamlessly*



## Strategic Planning

- "Treat automation as a principle to be embraced, rather than as a project to be done.
- "Plan to address basic requirements first, focusing on simpler ones with measurable results and move to complex requirements later.
- "Identify process improvements for more agility and transparency and easy adoption.



- "Do not build a use case for a single automation initiative.
- "Refrain from building big-bang approach covering multiple business processes and implementations.
- "Avoid carrying forward process debt in automation.

## Tools & Technologies

- "Proactively assume that organizations will have dozens of concurrent automation initiatives and identify future expectations with a holistic view.
- "Build a core team with stakeholders from various departments to ensure collective success and governance.
- "Choose technologies with low capital expenditures and optimize opex with usage patterns.

- "Avoid making a choice of tool sets based on one specific process and implementation & integrations.
- "Refrain from choosing future technologies based on current skills of teams & capabilities of existing legacy platforms.
- "Do not choose technologies with high capx and infrastructure overheads.

## Execution & Adoption

- "Consider significant factors while deciding team, including team readiness, cultural adoption, dependence on other technologies, and more.
- "Validate solutions with stakeholders responsible for manual process implementation.
- "Plan for show & tell, learning pathways, adoption sprints, and certifications for staff to ensure employees are upskilled to manage and customize themselves.

- "Do not establish incorrect timeline expectations.
- "Avoid fragmented technology partnerships for execution.



# Why Nagarro?





# Nagarro uses digital engineering capabilities to make non-profits smart and intelligent

## Automation:

Amalgamation of modern technologies

Integration platforms

RPAs

Low code & BPMS

Artificial intelligence

Machine learning

Computer vision

& more





## **We implement automation to make non-profits better & efficient**



**Build trust with digital experience for everyone**



**Form connected systems & motivated teams**



**Achieve operational excellence & transparency**



**Build new insights**



**Grow impact & make a better world**



**Meet fundraisings goals**



# An overview of Nagarro's offerings for non-profits

*We bring experience, agility, product engineering, & innovation*

## 200+ experts

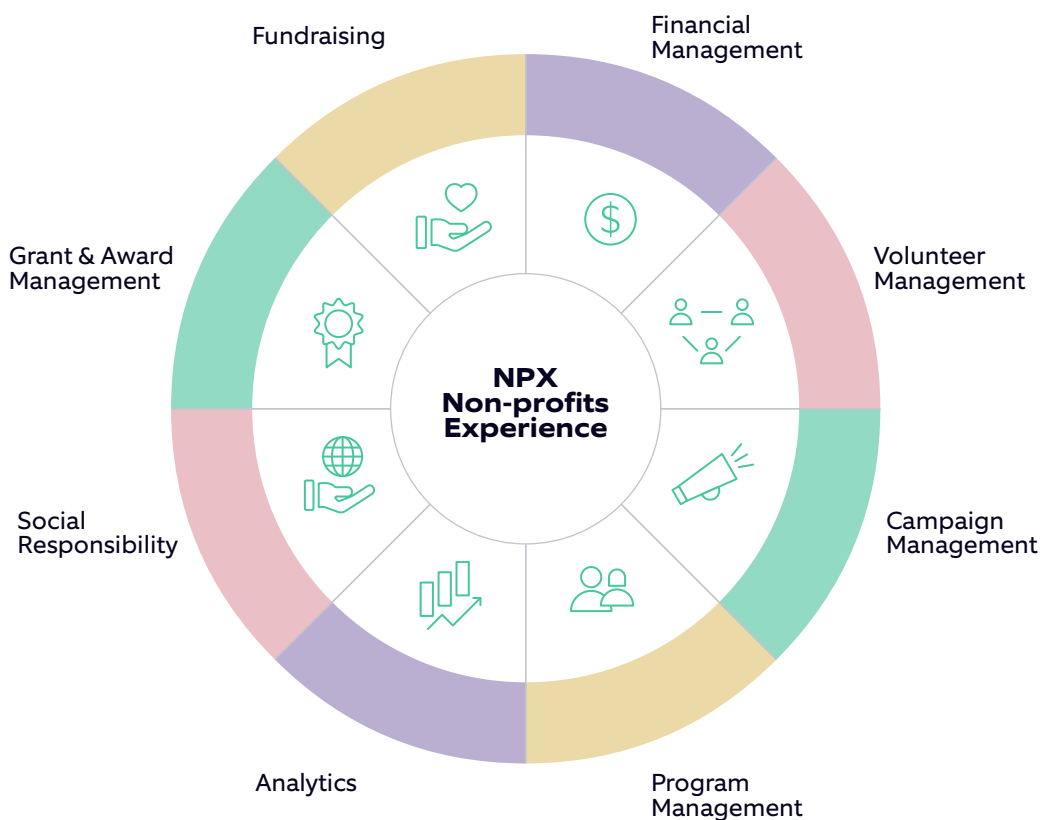
working  
for non-profits

## 14+ years

of non-profit  
domain experience

## 20+ products expertise

including fundraising, CRM,  
volunteering, and more...



## Our technology expertise in the non-profit sector

- Cognitive solutions using AI/ML
- Digital transformations enabled via Cloud
- Automation
- Data Analytics Solutions
- Solution consulting & technology advisory
- Virtual assistants

## Our non-profit solutions:

- Intelligent Fundraising
- Volunteering Engagement Platform
- Upskill platform



## What makes us a unique partner?

### **Experience: We know non-profits**

With more than 14 years in this domain, we understand how the non-profit world functions. We know the motivations and needs of organizations working in this space. We are proud to be innovation and technology partners to some of the biggest names in the industry.

### **Expertise: We have huge automation expertise**

We use framework-backed assessments for the right cost-effective automation adoption journey and provide end-to-end implementation guidance and engineering support.

### **Ownership: We are entrepreneurial**

Our teams are agile and non-hierarchical with an entrepreneurial mindset. We work like startups and love to take ownership ferociously. We are your go-to digital person for all your business needs.

### **Partnerships: We work closely with automation technology & big cloud providers**

We have deep partnerships with big cloud platforms making it easier for our customers to adopt cloud easier and faster.

### **And, we measure our success by client satisfaction**

80% of our revenue comes from repeat business with our existing customers. A large part of our new business also comes through existing customer referrals.





## Our partnerships

### Technology partnerships:



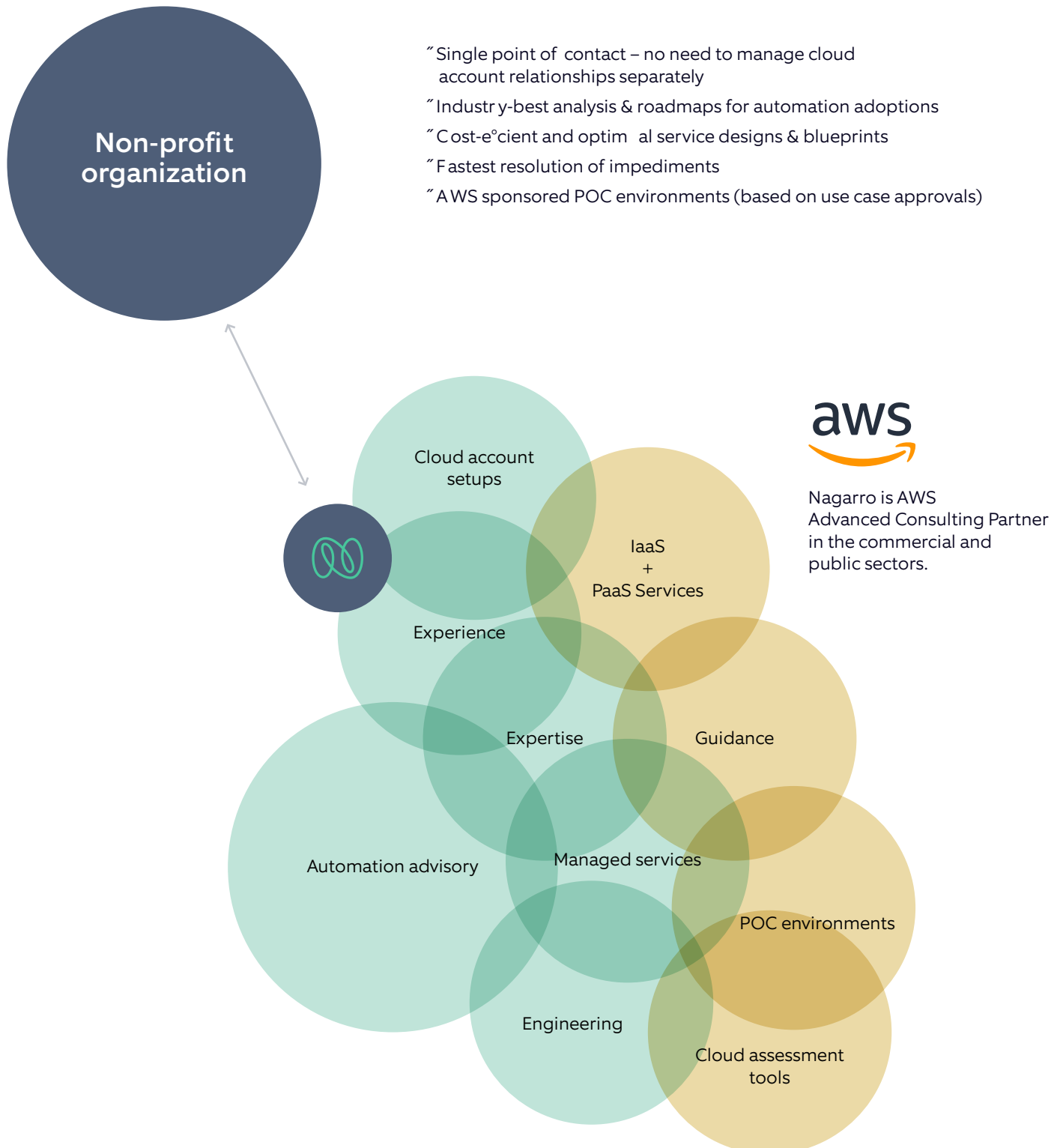
### Big cloud providers:





# Our deep partnership with AWS makes automation adoption easier

*Nagarro + AWS work as single team for you.*







## About us

### We are shaping the company of tomorrow

Nagarro is a global digital engineering leader with a full-service offering, including digital product engineering, digital commerce, customer experience, AI and ML-based solutions, cloud, immersive technologies, IoT solutions, and consulting on next-generation ERP. We help our clients become innovative, digital-first companies through our entrepreneurial and agile mindset, and we deliver on our promise of 'thinking breakthroughs.'

We have a broad and long-standing international customer base, primarily in Europe and North America.

This includes many global blue-chip companies, leading independent software vendors (ISVs), other market and industry leaders, and public sector clients.

Today, we boast over 18,000+ experts across 33 countries, forming a Nation of Nagarrians, ready to help our customers succeed.

(Status: Nov 2022)

## To get started, contact us at:

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