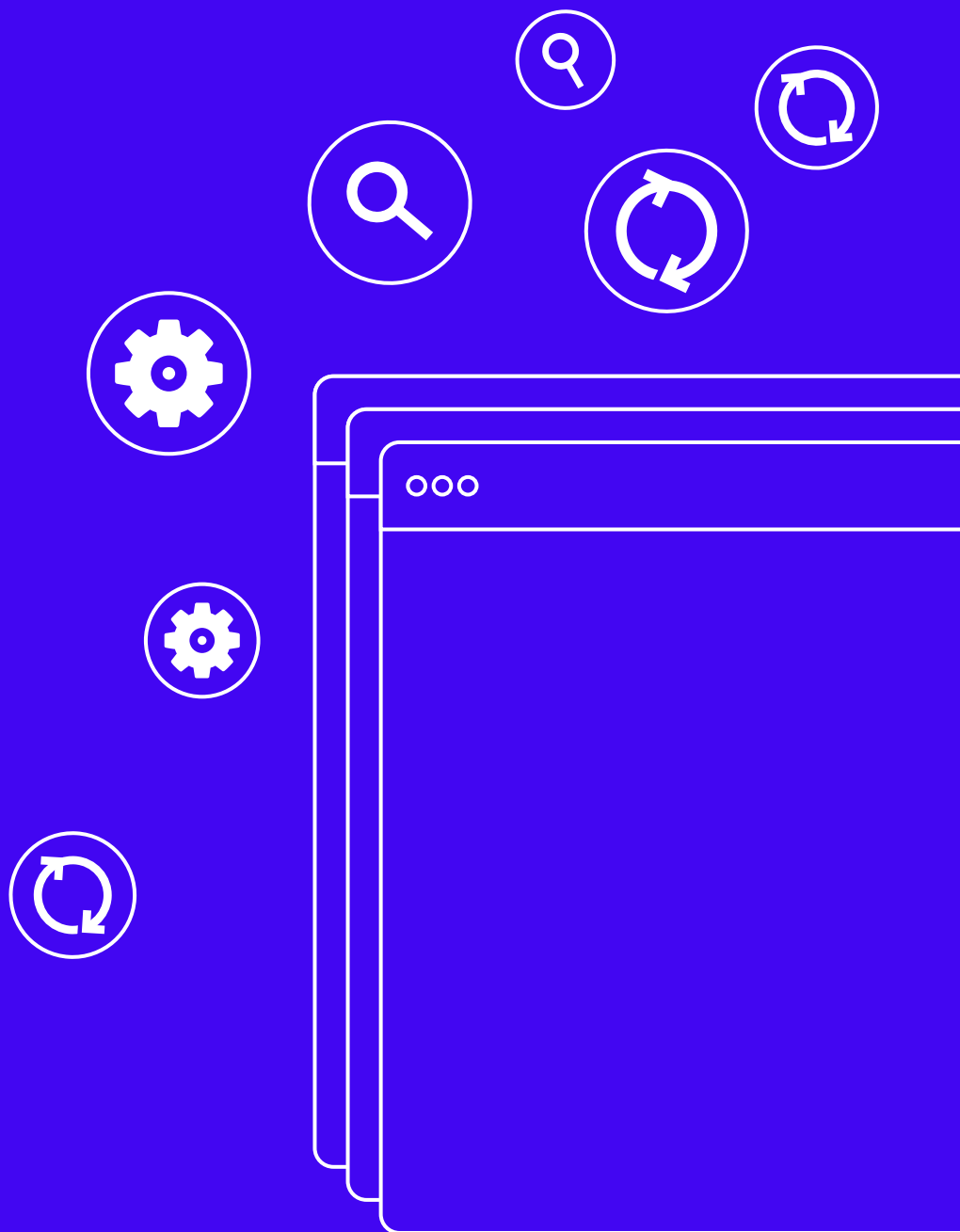


# Making an impact with automation

How Intelligent Automation can drive efficiency and increase the pace of transformation in the not-for-profit sector



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# **Introduction**

**Technological, environmental and societal changes – though common – are persistently unpredictable. At times, they happen so quickly it's hard to get a handle on them in the moment. These changes, arriving thicker and faster than ever before, rarely fail to shake the lives we live.**

The not-for-profit sector takes on responsibility for upholding and supporting our society. From its most vulnerable members, to the environment which houses it and the animals which live alongside it.

Charitable organisations must continue to use their two greatest assets – their purpose and their people. These assets are what will deliver the services, research and campaigns that keep growing in both number and need. They must do all this, whilst juggling the same operational challenges as profit-making organisations. The difference being, charitable organisations carry the added responsibility of maximising funds, furthering their cause and ultimately their impact.

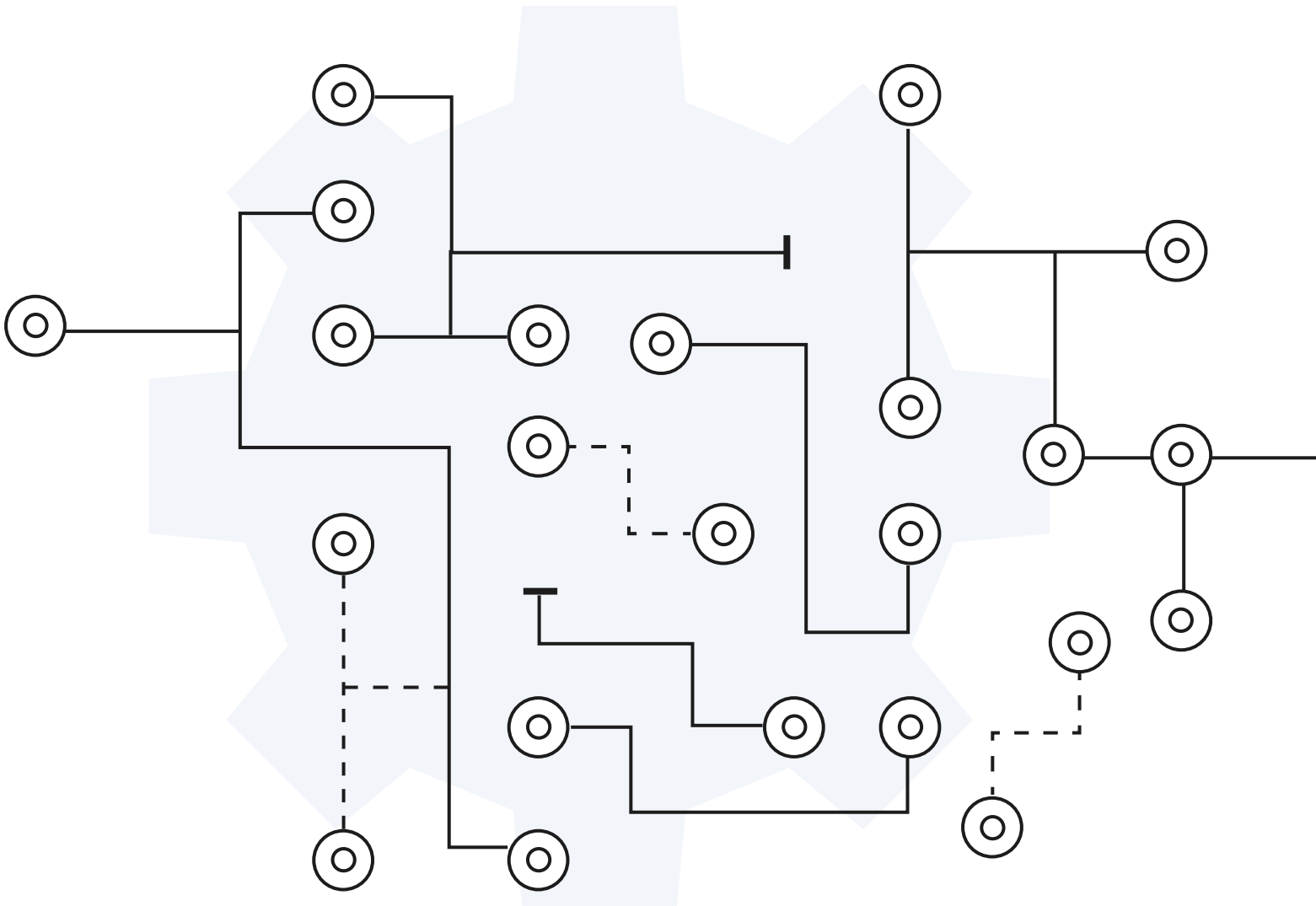
Last year, Manifesto carried out in-depth research into the future of the sector with a number of our partners. It resulted in our report, *The Future Charity*. This report highlighted key struggles facing the charity sector. These included delivering amid falling income, regaining public trust, and preparing for technological change.

Whilst these struggles are multi-faceted, it's crucially important to think about how you'll generate your income, because this income fuels the fundamental services you deliver. That's why it's also essential to embrace new fundraising opportunities, which will ultimately help you deliver against your charitable purpose.

This guide highlights, through a series of case studies, how Intelligent Automation can change the way you resource. Supporting the services you deliver, and shaping your productivity and efficiency gains.

**Making an impact with automation**

Intelligent automation will help you to overcome everyday obstacles. It will make every penny of your income count. All the while enabling you to expand on the services you provide without putting further strain on your existing workforce. Freeing up time so your people can spend it on high-value, game-changing activities – rather than the mundane and repetitive tasks – is paramount.



# Jargon busting

Automation comes in many forms. But generally, it refers to the performing of human actions, automatically, with the end goal of minimising administrative strain on the human workforce.

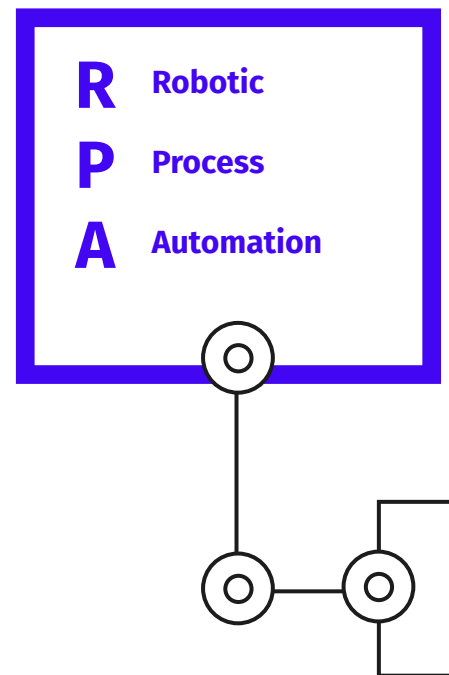
## What is RPA?

Robotic Process Automation, or RPA, encompasses two processes. The first is the mapping of a human action, and the second is the automation of this human action – which is likely administrative and repetitive. To automate it, RPA uses a software ‘robot’ or digital tool.

Getting rid of the need for manual programming, RPA software will observe a human carrying out an action. It then maps this action to a process it can execute itself repeatedly.

There is, however, some analysis and manipulation which has to happen for RPA software to correctly identify and set up processes in an appropriate way. Think of them like little macros in Excel, except they’re not constrained to any specific computer system and can behave like a person using your computer.

So this is where we get processes and digital workers. A digital worker is the computing power to execute a process. The process is the task to be completed. A worker can move between many types of process, but will execute them in a linear fashion, albeit much faster than a human could.



## **Intelligent Automation**

Intelligent Automation, in the form of digital labour, combines AI capabilities with traditional Robotic Process Automation (RPA) and cloud technology. This technology combination emulates the actions of humans carrying out office-based work. It frees up your employees from time intensive tasks which slow them down and prevent them from doing the work that really matters.

Set aside from RPA, digital labour can carry out more than just a simple, structured task. When paired with other readily available technologies and built-in error handling, you can create a solution with wide-ranging intelligent capabilities. Ones which go beyond specific areas of a business.

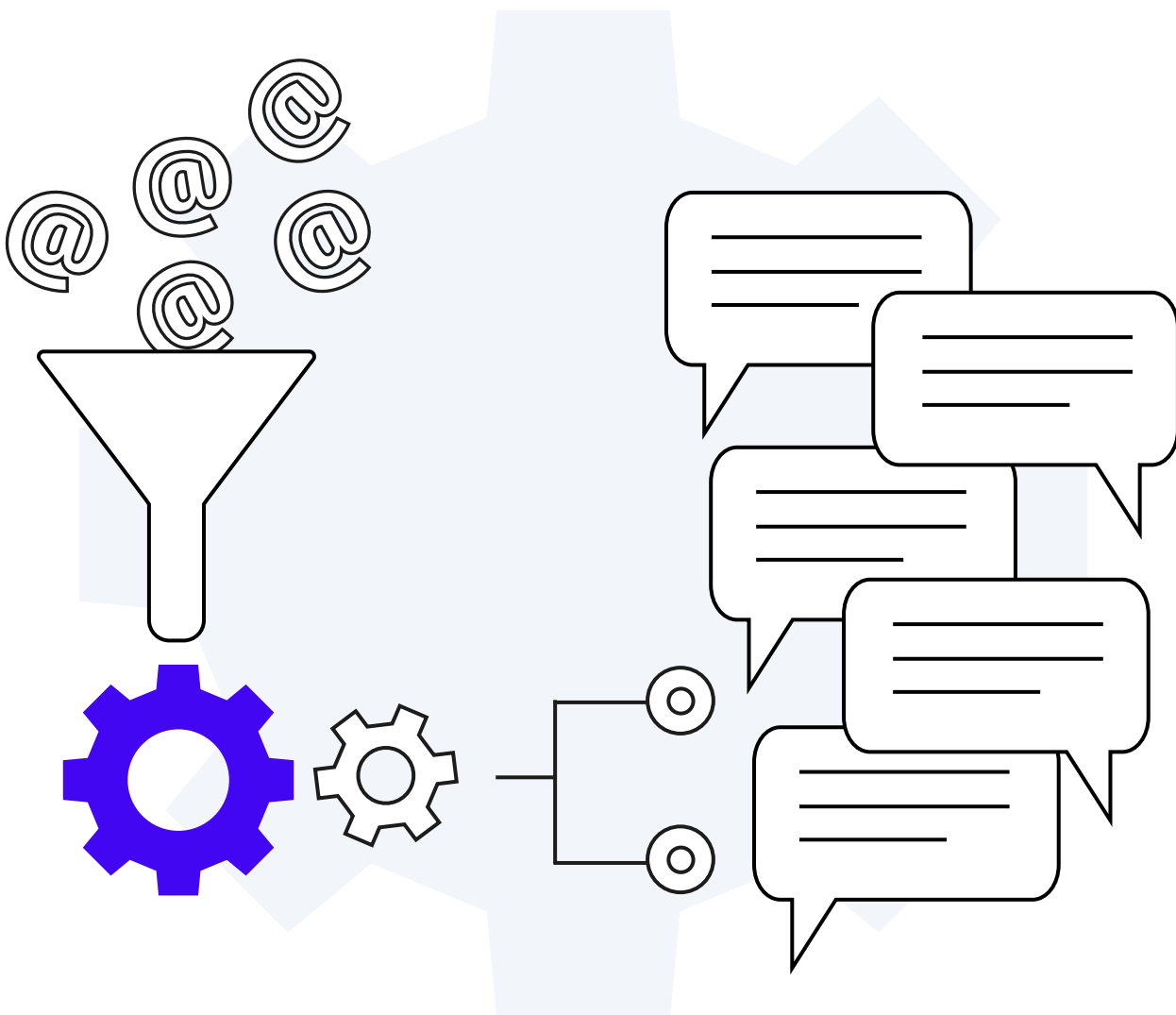
**Simple examples of intelligence that can be added include:**

- Document recognition
- Natural Language Processing (NLP)
- Speech to text
- Searching based on information provided
- Contextual awareness (e.g. linked to schedules, calendars, stock availability etc)

## **What is NLP?**

Natural Language Processing (NLP) is when a computer breaks down and discerns the meaning from either spoken or written prose. From Google Assistant, to Apple's Siri, to Amazon's Alexa – we've all likely experienced NLP without even realising. Why do we need NLP? Because machines do not speak our language, instead they understand binary code – a series of ones and zeros which tell a computer how to complete its tasks.

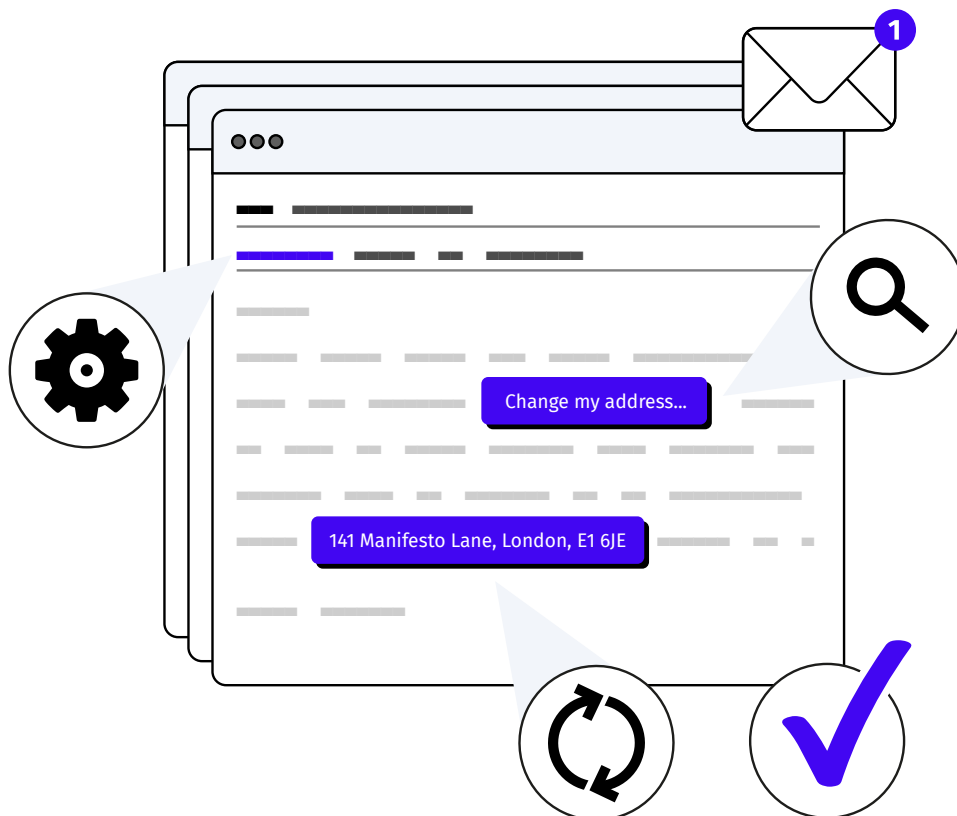
So, NLP essentially acts as an intermediary between us and the computer. In the context of automation, this might be a computer reading an unstructured email from a supporter and understanding from it the wish to change an address, for example.



# An automation journey example

## Automation monitoring a supporter inbox

- 01** An email arrives and the NLP service reads the email
- 02** It discerns that someone wishes to change their address and identifies the new address from the email
- 03** It hands off to a separate address change process – where the request sits in a queue until digital worker resource is available and moves on to the next email
- 04** Another digital worker then picks up a request in the 'Address change queue'
- 05** It looks up the supporter in the CRM using their email address and validates a match for the record
- 06** It then emails the supporter confirming that they've requested an address change and asking them to validate the update is correct
- 07** Once a positive response is received the request is picked up again and the address updated in the system



At any stage, additional steps, checks or security validation can be added. This means the process doesn't have to be purely robotic, it can be handed back to a human for final checking.



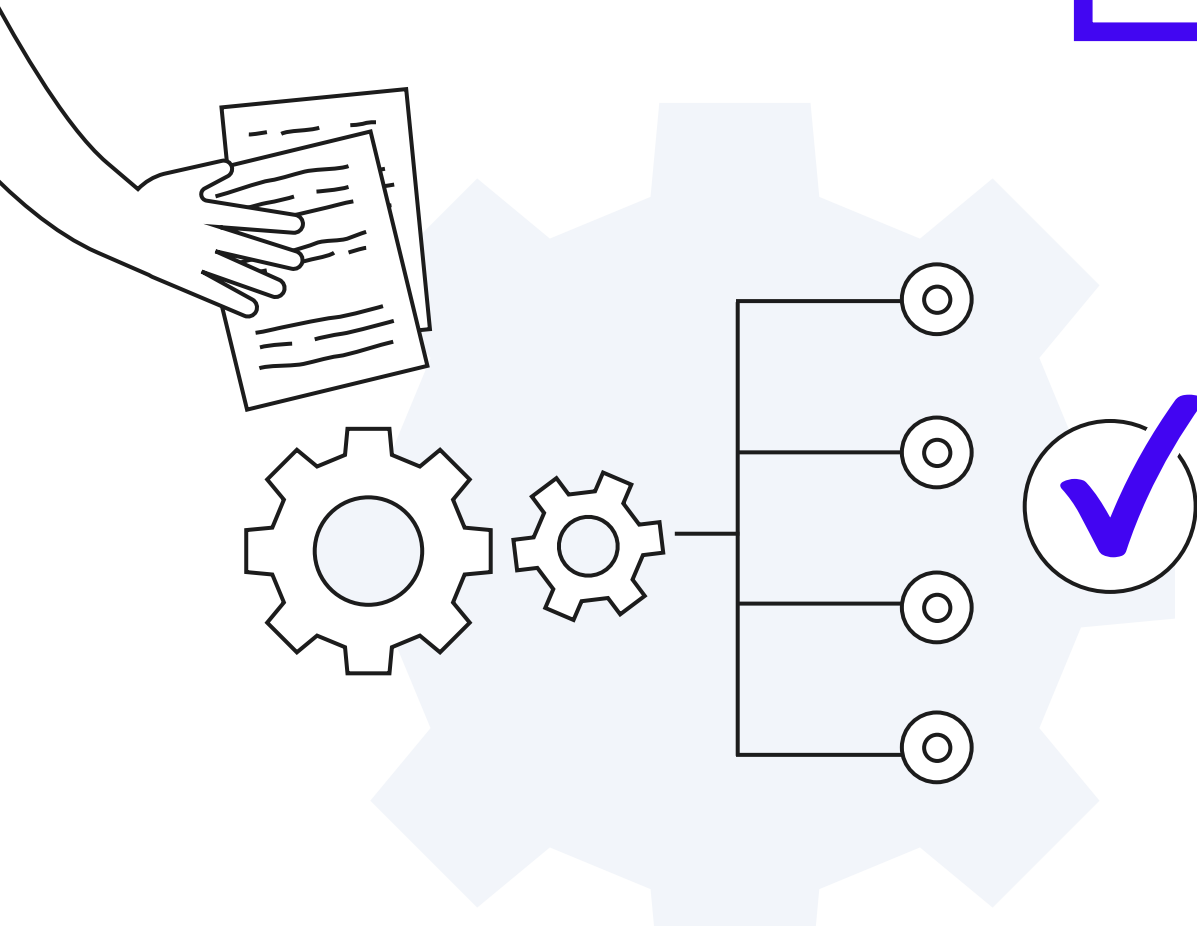
# Flexible technology

The emergence of digital labour means not-for-profit organisations have essential and scalable resources at their disposal. This flexible technology creates a single view, and it negates the need for expensive Application Programme Interfaces (API) integration. This is because automation can sync existing tech – such as Customer Relationship Management (CRM) – with other applications and automate the processes afterwards.

By blending human and digital labour, new efficiencies can be created for organisations. Not only does it free up staff from repetitive and time-consuming work, it opens up a new approach which evolves the way you think about delivering your charitable services.

**A** Application  
**P** Programme  
**I** Interfaces

**C** Customer  
**R** Relationship  
**M** Management



# How can digital labour support your organisation?

## Digital labour examples for the not-for-profit sector

Increase your fundraising efforts by investing in digital workers to integrate Third-Party Platforms (TPPs)

Onboarding volunteers with ease

Reclaim Gift Aid through automation and reinvest your time and money on more value-added tasks

Dialling digital workers up and down to manage your seasonal donation peaks

**Example 1**

## **Increase your fundraising efforts by investing in digital workers to integrate Third-Party Platforms (TPPs)**

Whilst platforms such as JustGiving and Virgin Money Giving play a vital role in the fundraising process, it's well known that many smaller not-for-profits simply don't have the technical know-how to easily integrate these platforms into their internal systems. But new entrants to the market are starting to emerge. Facebook Fundraisers, for example, has already seen more than \$3 billion donated via its platform.

The reason major platforms are hard to plug in to is down to the human intervention required to set it up. Workers generally need to log into each individual system and manually input data from one system to another. Or, they spend the majority of their time reconciling data.

Either way, it's all too often a time consuming, costly and error prone exercise – eroding the full value of fundraising efforts. The process also gets weighed down by numerous back-and-forths between fundraising and finance teams, deciding on the correct coding of income generated.

This sort of painstaking process is ideal for that of a digital worker, and can alleviate the monotony it entailed for existing staff and ensure data entry is 100% accurate. By letting a digital worker log in, pull the information and input it into various systems, one of our not-for-profit partners was able to use the freed up capacity this created to recruit additional supporters. Hence achieving a faster and more significant return on its investment.

## Example 2

### **Reclaim Gift Aid through automation and reinvest your time and money on more value-added tasks**

The Gift Aid scheme provides a vital increase in revenue for charities. It allows them to claim tax relief on qualifying donations from UK taxpayers. However, for many charities, claiming Gift Aid from HMRC is a time consuming and data intensive exercise. It also puts resources under undue pressure.

Many organisations pour large amounts of staff time into capturing, following up on and bringing together the data required to maximise Gift Aid claims. For smaller charities, the administrative strain means that they often miss out on making the most of Gift Aid because they can't afford to resource the process.

Again, this is an ideal task for a digital worker. One can be set up to access all of the personal details required by HMRC – from multiple systems if necessary. These details can include things like title, full name, address details, event and donation. It can be set up to enter 1,000 data details in line with the HMRC limits, and then start the process all over again.

Not only does it significantly reduce the cost of claiming, it also removes the risk of human error in the work. Performing it at a machine speed, admin teams can once again be freed up to focus on more pressing, value-added tasks. This process is prime for automation, both for large and small not-for-profit organisations alike.

There's even potential for increasing the number of people who have opted-in for Gift Aid. You can use automation to contact potential donors, collect the additional data needed and then update the relevant systems. With the ability to go back up to 4 years from the point of donation, the potential for retrospective improvement could be huge.

### Example 3

## Onboarding volunteers with ease

Onboarding volunteers requires multiple stages and is by no means fast. From safeguarding to regulation, volunteers have to go through a number of levels of checks in order to take part.

The onboarding process usually follows a similar route across most organisations. Somebody will enquire about a volunteer role at a charity. The candidate then goes through a recruitment process, in which they are either asked to volunteer, or are rejected. If successful, the volunteering manager will need to start the onboarding process to get the person ready to start. This could include police checks, login details, IT onboarding, HR system data entry, day one introduction, policy information and continuous contact updates.

All in all, the cost of onboarding volunteers for both large and small not-for-profit organisations is hefty.

Intelligent Automation can substantially reduce this cost. Once a person sends in a volunteer application, a digital worker can be activated. From there, this digital worker can perform each step of the onboarding process.

It will use a mixture of technology, from Natural Language Processing (NLP) to Intelligent Optical Character Recognition (iOCR). This technology will help it read, write and communicate with the volunteer through each step of the process.

The result? A volunteer onboarded without error and with full checks in place. The technology acts as a support to the recruiting manager, rather than replacing things like face-to-face interviews or discussions with the candidate. Instead, it makes the administration around the personal interactions painless.

**Example 4**

## **Dialling digital workers up and down to manage your seasonal donation peaks**

Given that charitable donations can rise by nearly 5%<sup>1</sup> (and much more for some organisations) over the Christmas period compared to some of the summer months, it's no wonder not-for-profits struggle to resource their peaks. Especially when the peaks aren't just around Christmas – for many organisations, the London Marathon creates another stretch on resources. Troughs typically hit around September. Although we may see changes here (especially to in-person fundraising events) since the coronavirus pandemic.

In order to address this issue, many not-for-profits do one of two things. They will either resource at 90% capacity, or hire untrained temporary staff to cover the peaks in workload. Neither of which is conducive to efficiency or cost.

Aside from the standard benefits of digital labour, it can also offer many more benefits when deployed from the cloud.

Due to the nature of cloud technology, it allows digital labour to flex and take the demands of peaks in its stride. You can then right size your departments and save resourcing costs. Not to mention, you already have the standard efficiencies delivered by digital labour under your belt. So, when the money comes flooding in, you'll be ready to handle it.

<sup>1</sup> [www.cafonline.org/docs/default-source/about-us-publications/caf-uk-giving-2018-report.pdf](http://www.cafonline.org/docs/default-source/about-us-publications/caf-uk-giving-2018-report.pdf)

# Integrating RPA in your organisation

**A successful Robotic Process Automation (RPA) project might sound like it hinges on good technology, but in actual fact an organisation's culture is often a much bigger determiner of success.**

**Read more:**  
[12 Principles of Agile Software Development](#)

All too often, organisations get distracted with the tech – arguably the easy part – whilst failing to address cultural change. Identifying which processes you want to automate is important, but without an understanding of workplace culture this information is useless.

One of the 12 Principles of Agile Software Development highlights the importance of building projects around motivated individuals. Without an environment which supports them, organisations can't expect seamless integration of RPA.

To understand office culture, firms need to understand how their workplaces will react to automation. And those scared of embracing automation need to know what's in it for them.

Presented as a catalyst for cultural change, RPA should be explained in the context of how it can help staff. The most obvious is the freeing up of their time from mundane, task-based jobs. A lesser thought of benefit is the creation of new, higher-value jobs. If workers are tech-savvy, they are more valuable – hence making RPA a key component in job security.

And whilst getting buy-in from staff is important, organisations also need to engage their stakeholders, who will ideally become champions and promoters of the technology. This is an easy sell to stakeholders, as RPA is proven to boost productivity – hence saving money – and breeds better customer service which reduces churn.

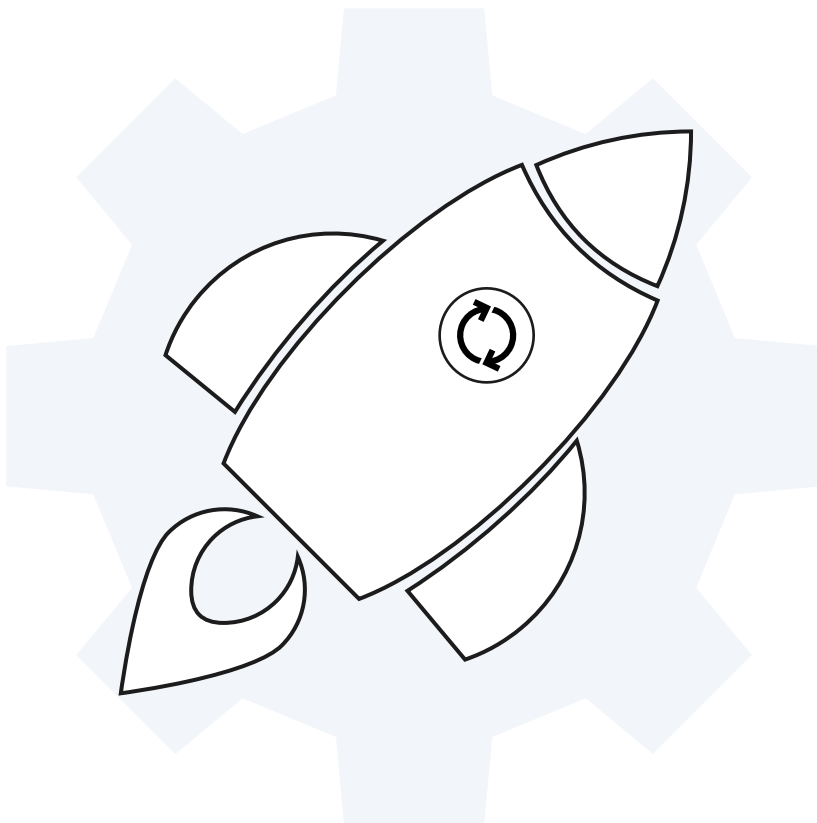
All this information and preparation helps an organisation's implementation partner execute RPA projects much more effectively. The ultimate aim is to achieve seamless two-way workflows between humans and bots.

# Delivering change for your organisation

**If your organisation wants to continue delivering essential support and services effectively and at scale, then new approaches to resourcing must be taken. By using digital labour across your organisation, you can seriously improve the impact you have on the area you're trying to help.**

No matter your size, you no longer need to endure the challenges you face without help. These real-world examples of Intelligent Automation application outline the exciting possibilities technology could have in store for your organisation.

Whether you're a small organisation, or you have peaks of donations throughout the year, digital labour can give staff time back so they can truly focus on your frontline cause. Digital labour is so much more than a simple technology deployment. It's a resource which, once understood, will empower you to create positive change.





## Your technology partner

Now is the time for your organisation to take its next transformation step. To explore how digital labour could help you be more ready for the changes which just keep on coming.

Together with our partner Human+, we can help you think beyond your current capacity, and think further than the donation targets you're currently hitting.

Get in touch with us today to see how we can help support your future.

### **Manifesto**

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