

OUTSOURCING FOR FLEXIBLE DIRECT DEBIT MANAGEMENT

Moving their in-house Direct Debit processing to Woods Valldata delivers efficient and scalable management giving teams more time to focus on strategic activities.

GOAL

RNIB found Direct Debit management in-house to be a manual, time-consuming process. The Fundraising Operations team went looking for a partner who could deliver a more flexible and efficient service freeing their team up from the day-to-day requirements. Woods Valldata came out on top.

SUCCESS

- ▶ Migration achieved within 5 months of the project launch, including two months of parallel running.
- ▶ More claim dates enabled reducing lead times for set-ups and lowering attrition rates.
- ▶ One point of contact as an extension of the RNIB team means increased efficiency across all outsourced income processing streams:
 - Cash payment processing
 - Raffle print and production
 - Weekly lottery services
 - Full direct debit services.



“The benefits of this transition means that RNIB can now offer our donors more than just the two claim dates we originally had. We also have the benefit of Woods Valldata’s Direct Debit expertise and a solid platform in which our Direct Debits are being managed.”

Stel Kyriacou, Senior Operations Manager, RNIB

SERVICES

- ▶ Direct Debit Processing
- ▶ Migration Project Management



OUR APPROACH

Audit

RNIB were looking for:

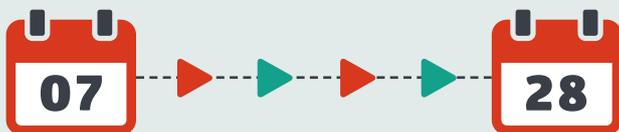
- ▶ Woods Valldata to act as a DD management hub
- ▶ Management of new Direct Debit set ups from multiple sources including:
 - Mail
 - Phone
 - Third party imports (F2F, D2D, web, telemarketing agencies etc)
 - Online sign ups
 - RNIB Supporter Care input direct into the Woods Valldata web portal

Our Business Analytics team assessed the requirements for the Direct Debit migration working alongside RNIB and proposed a workable action plan.

Recommendations

Woods Valldata recommended the use of the following project tools to keep the project on track and achieve the desired migration dates:

- ▶ Milestone plan
- ▶ RAID (Risks, Actions, Issues, Decisions) log
- ▶ DD cut-over plan



Implementation

Close management including weekly stakeholder meetings made sure everyone knew what they needed to do by when.

Migration was achieved within 5 months of the project starting including phased changeovers based on DD claim dates without any loss of income or missed payment rounds.



CONTINUOUS IMPROVEMENT

Working with Woods Valldata means RNIB offer more flexible regular giving options to their supporters and enable the Individual Giving team to be more innovative in their fundraising products. Since the initial migration, we have been able to support RNIB through:

- ▶ **Scaleability:** Woods Valldata's extensive DD experience means RNIB can be confident about growing their regular giving programmes – with no additional effort required.
- ▶ **Flexibility:** Being able to offer additional claim dates easily with no extra processing costs.
- ▶ **Speed:** Being a single data touchpoint has vastly shortened lead-times (and increased data security) significantly reducing acquisition attrition.
- ▶ **Reduced risk:** Processing the Direct Debits on behalf of RNIB, Woods Valldata have taken on the submission risk and business continuity requirements.
- ▶ **Submission certainty:** Data verification on import and tried and tested automated systems mitigate the risk of human error. Every Bacs submission is made quickly and efficiently, and administrative communications are released timely and appropriate to the supporters' need.
- ▶ **Online access:** RNIB have instant online control of their supporters' details. Online reports for reconciliation are easily accessed and ready whenever needed.

ABOUT WOODS VALLDATA

Woods Valldata is passionate about helping you raise more income for your vital work. We believe in what we do and make it our mission to be the best. Our team of 200+ sector specialists help charities raise over £100 million in fundraising income per year supporting them with their raffles, weekly lottery, response handling, fulfilment, digital scanning and direct debit processing. We offer an unparalleled level of service, with the strategic insight to identify opportunities and inform innovation whilst following the highest compliance standards for PCI, ISO and the Gambling Commission.

Whatever you're looking to achieve with your fundraising, with Woods Valldata you're in safe hands.

To talk to us about your individual giving programmes, contact us on charities@woodsvalldata.co.uk