

OVER 5-DAYS A WEEK SAVED BY OUTSOURCING DD PROCESSING

Outsourcing time-consuming Direct Debit (DD) processing made life easier and simpler for Age UK.

GOAL

Age UK were going through a process of streamlining and consolidating services and suppliers. DD processing was managed in-house and was a huge administrative burden taking someone nearly full-time to manage all the elements of the process. They were looking to create efficiencies and saw outsourcing to a trusted partner as the solution. After being awarded the contract through tender process, Woods Valldata made the first outsourced claim in January 2016.

SUCCESS

- ▶ Process over 280,000 DD payments per year.
- ▶ Able to flex volume according to campaign programme upgrades and acquisition.



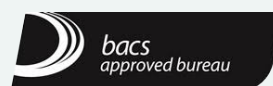
“It’s the best decision we made. DD processing and the associated admin was an almost full-time job. It’s now something we hardly ever have to really think about. It’s really easy. The process just works!

“We had confidence in the transition during what was an uncertain time for Age UK. It was clear Woods Valldata could cover all the element we needed: 23,000 direct debits per month (and rising), four SUNs and four claim dates. The first claim went out without any issues and it’s all gone smoothly since then.”

Sarah Williams, Data Services Manager, Age UK

SERVICES

- ▶ DD processing
- ▶ Appeal Management
- ▶ Gift Aid Claims
- ▶ Banking & Thanking



OUR APPROACH

Background

Woods Valldata had worked with Help the Aged and Age Concern before the merger of the two charities when Age UK brought all Direct Debit processing back in-house. They were in the process of migrating their database to MS Dynamics and were looking to streamline processes at the same time. One objective was to get DD's outsourced before the change-over occurred.

Requirements

- ▶ Streamline processes to free-up internal resource.
- ▶ Consolidate DD processing, appeal management, Gift Aid claims and banking and thanking under one supplier partner.
- ▶ Trusted, compliant, experienced services partner.
- ▶ Excellent service, advice and support.
- ▶ Ease of use operationally from Supporter Engagement team.

Implementation

Age UK onboarded with Woods Valldata simply and easily. The onboarding process is clearly laid out with roles, responsibilities and milestone timings using PRINCE2 project management methodology.

Woods Valldata receive new data from Age UK via import, process claims including submissions, AUDDIS, ARRADS and ADDACS via Bacs and manage all supporter admin for ANLs, reject management and other trigger communications. Age UK simply load the exported data back into their database.

Woods Valldata also manage Age UK's appeal response handling, with associated banking and thanking, as well as submission of all Gift Aid Claims. With all services under one roof, Woods Valldata are able to fully support Age UK even in times of rapid change. In March 2020, when the country went into lockdown and the Age UK offices were shut, Woods Valldata was able to continue processing donations, providing digital scans of mail, and delivering thank you letters to all donors during this period.

CONTINUOUS IMPROVEMENT

We're constantly looking for ways to improve the service and efficiency of our service. It is testament to the rigorous processes Woods Valldata follow with their DD processing that Age UK have never had to request any changes to the system.

"Efficient doesn't cover it," says Sarah Williams. "We just know the process will work and have faith that Woods Valldata know what they're doing."

Contact Manager, an online supporter database securely accessed by the Woods Valldata supporter services team and Age UK supporter engagement team alike, has been one innovation that has made life even easier. It means Age UK can access live supporter details and update their records in the system. The supporter always has the best experience and the supporter service executives on both sides can answer calls with full supporter information quickly and efficiently.

"It's really straight forward and easy to use and means we haven't had to invest in expensive and time-consuming database development." **Sarah Williams**

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