



CASE STUDY

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DIGITALLY TRANSFORMING A PAPER PROCESS

The client was seeking a standalone digital solution to enable real-time access to both chapters and members.



Challenge

A financial services organization lacked digital connectivity to their 2,000 plus philanthropic chapters, which included 750,000 members. In order to fundraise, host events, market to new & existing customers, and track all of this information, each chapter had to complete the tasks via paper and submit them to the FinServ organization headquarters.

Inundated with multiple data entries in an outdated and extremely limited mainframe system, the client was seeking a standalone digital solution to enable real-time access to both chapters and members, streamline processing, and reduce burden on external users.

Solution

To sooth the client's skepticism that a fully-digitized solution was do-able, Magenics worked closely with client IT teams, business units, chapter leaders, and chapter members to gain a full understanding of the process and goals for the firm's philanthropic arm. With a well-defined vision of how the client wanted to enable its members, Magenics was able to create a path to a digitally enabled process.

Utilizing Magenics's unique approach to delivery, Magenics Foundation, software was created iteratively, incorporating immediate feedback and response from users. As each new chapter function was released, the client gained an instant and automated connection with their chapter leaders and members.

Results

The new chapter management portal completely modernized the philanthropic abilities, both in digital functionality and in the user experience. The standalone web application made the process completely paperless, allowing users to do more with less effort. Some of the chapter functions that had previously taken months to process and approve can now be completed and processed within a week of submittal. Members of each chapter have gained full visibility to their chapters, allowing them to be more involved in the community than they had ever been before.



By creating a fully digital process for its members, it enabled accounting, corporate communications, marketing, event planners, and third-party vendors to drive a successful fundraising event.



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