

CASE STUDY

GIFT PROCESSING TRANSFORMATION FOR GOOD DONE GREAT



OUTCOMES

Online and EFT processing for CSR program giving

Automated bank account reconciliation

40% reduction in costs and handling errors

OVERVIEW

Good Done Great was a leading CSR software provider prior to being acquired by a competitor in 2017. In the two years leading up to the acquisition, GDG acquired AmeriGives, a CSR competitor led by Gary Carr and Steve Greenhalgh (now the principals of CSR Matters). Gary led a complete re-engineering of GDG's gift processing business.

CHALLENGES

Charitable gift processing for third-party software companies is a complex business, often misunderstood and underappreciated by corporate clients and non-profits. Good Done Great had undertaken a significant investment to develop a new CSR giving platform while also acquiring competitor AmeriGives, whose own gift processing was rigorous but lacked automation.

The challenge was to combine these two companies' operations, upgrading across a single technology, and applying financial services best practices in transparency, accountability, and velocity.

DESIGNING A BETTER MOUSETRAP

Processing more than \$40 million in gifts annually to 16,000 charities on behalf of 30+ corporate clients, and with new Fortune-level clients being booked every week, "We needed to design and implement new processes *while the plane was in the air*," says Gary. Starting with banking needs and gift processing regs, Good Done Great worked with DonateWell's DAF to replace old, manual disbursements that depended upon manual labor and spreadsheets.

Check payments became EFTs, paper reports became real-time online data, audit trails were created, and customers were given a clear view into the status of gift payments. To institutionalize these process improvements, GDG brought in an independent audit firm to establish the foundation for future SOC audits.

CONCLUSIONS

Within six months, GDG's gift disbursement business had been transformed, achieving a 40% cost reduction. Automated bank reconciliations, real time access to payment status, and dashboard controls gave GDG's customers a level of transparency and accountability unsurpassed in the CSR industry.

"Gary made Good Done Great a better company. His unique combination of financial services, fundraising and software experience was instrumental in our success."

— David Barach, CEO



Gary Carr
Engagement Lead

Gary served as the CFO of Good Done Great and managed their affiliated donor advised fund at DonateWell.

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