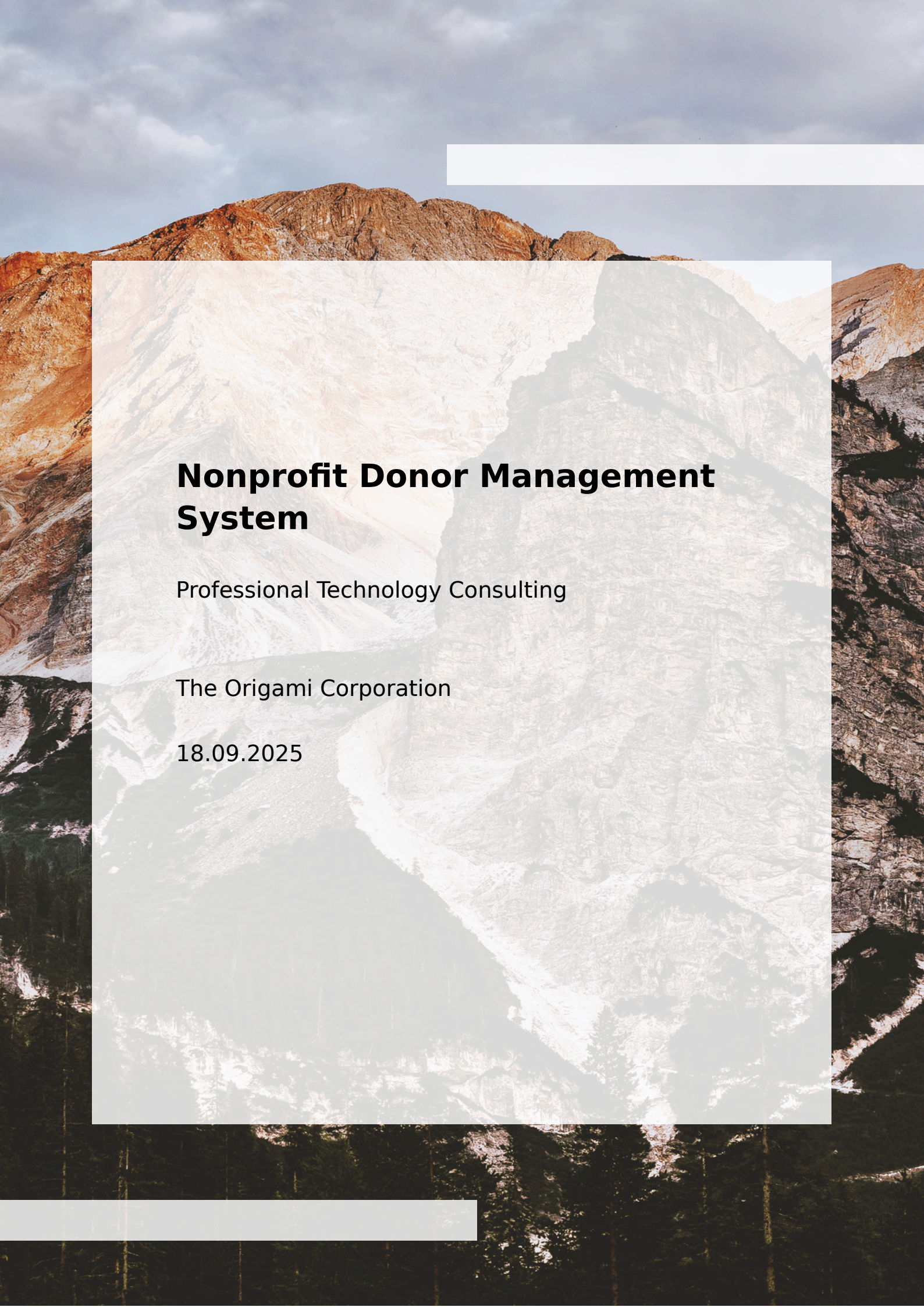




Nonprofit Donor Management System

Professional Technology Consulting

The Origami Corporation

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Scaling Generosity: Centralizing Donor Management and Payments for a Global Nonprofit

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About The Origami Corporation

1 Scaling Generosity: Centralizing Donor Management and Payments for a Global Nonprofit

1.1 Executive Summary

A nonprofit supporting programs across three countries managed 10,000 donor records using spreadsheets and manual processes. This created bottlenecks in fundraising, fragmented communication, and limited visibility into donor behavior. We delivered a comprehensive transformation anchored by our Origami CRM, a modern donation portal integrated with eight payment methods, and automated email campaigns powered by reliable mail hosting. The result: a 45% increase in donation conversion, a reduction of 20 hours of administrative work per week, and measurable improvements in donor retention through personalized, data-driven communication.

Services included crm-implementation, web-development, mail-hosting, business-intelligence, and project-based-development. The engagement integrated technology and process change to accelerate fundraising outcomes while ensuring compliance, scalability, and ease of use for a lean nonprofit team.

1.2 The Challenge

Operating across multiple countries with 10,000 donor records, the nonprofit faced common but critical operational hurdles:

- Fragmented data: Multiple spreadsheets with inconsistent formats, duplicate entries, and no single source of truth.
- Manual processing: Gift entry, acknowledgements, and reporting took significant staff time and were prone to human error.
- Limited donor insight: No segmentation, cohort analysis, or predictive view of donor behavior; decisions were reactive rather than

data-informed. - Inconsistent communications: Email outreach lacked personalization and automation, contributing to churn and lower conversion. - Payment complexity: Donors encountered friction with limited payment options, different currencies, and unclear receipts, negatively affecting completion rates. - Compliance and security: Results tracking, audit evidence, and data protection requirements were difficult to meet using spreadsheets and ad hoc tools.

The organization needed a unified platform to manage donors end-to-end, streamline giving, and modernize communications—without overwhelming staff or budgets.

1.3 Our Approach

We applied a project-based development model, aligned to clear milestones and acceptance criteria, to minimize delivery risk and ensure adoption: 1. Discovery and design: Workshops with fundraising, finance, and program teams mapped current-state processes and defined a future-state operating model. We prioritized quick wins that would unlock immediate value (e.g., faster donation processing) while laying a foundation for advanced analytics. 2. Architecture blueprint: We proposed Origami CRM as the core donor system, with a modular web donation portal, an integration layer for payments and email events, and a BI stack for insights. The architecture emphasized security, performance, and internationalization. 3. Iterative delivery: Workstreams for CRM configuration, data migration, portal development, payment orchestration, email automation, and analytics ran in parallel sprints. We used frequent demos and UAT cycles to tighten feedback loops. 4. Change management: Training sessions, playbooks, and role-based permissions were set to enable adoption without disrupting fundraising operations.

1.4 Implementation

The solution modernized donor operations from intake to stewardship:

- CRM Implementation (Origami CRM)
 - Data model: We configured entities for Contacts, Households, Organizations, Donations, Pledges, Recurring Gifts, Campaigns, Funds, Appeals, and Interactions. Custom fields captured country-specific compliance requirements and donor preferences.
 - Process automation: Flows for pledge reminders, recurring gift renewals, and staff task assignment reduced manual follow-ups. Automated tax/receipt generation respected local compliance in each operating country.
 - Access control and audit: Role-based permissions and field-level security protected PII. Comprehensive audit logs provided traceability for gifts and communications.

- Data Migration and Quality
 - ETL: We built an ETL pipeline to ingest spreadsheets, normalize country-specific formats, and validate mandatory fields.
 - Deduplication: Fuzzy matching on name, email, and postal address resolved duplicates. A merge process kept historical gift data intact while consolidating donor profiles.
 - Data hygiene: Address standardization and consent flag normalization enabled compliant outreach and more accurate segmentation.
- Web Development: Donation Portal
 - Experience design: A mobile-first, WCAG 2.1 AA-compliant interface minimized abandonment. Key features included one-time and recurring gifts, suggested amounts with impact statements, and donor self-service for receipts and payment methods.
 - Localization: Multi-currency display, translated content, and localized address formats reduced friction for donors across three countries.
 - Performance and reliability: The portal used a stateless API layer and CDN caching for fast global performance. Health checks and rate limiting protected availability during campaign spikes.
- Payment Integration (8 Methods)
 - Orchestration: We integrated eight payment methods (including major cards, bank transfer, and popular digital wallets) through a unified payment abstraction. This simplified routing and reduced vendor lock-in.
 - Compliance and security: All transactions were processed using tokenization and strong transport encryption, with support for additional authentication (e.g., 3-D Secure where applicable). Idempotent webhooks and a message queue ensured reliable gift recording even during provider interruptions.
 - Reconciliation: Automated payout reconciliation posted to the CRM against funds and campaigns, streamlining finance workflows.
- Mail Hosting and Automated Campaigns
 - Deliverability: We configured SPF, DKIM, and DMARC for the nonprofit's domains to improve trust and inbox placement. Suppression lists and bounce handling protected sender reputation.
 - Segmentation and personalization: Donor journeys were tailored by recency, frequency, and monetary (RFM) tiers, geography, and campaign engagement. Dynamic content personalized asks and impact stories.
 - Lifecycle automation: Welcome series for new donors, reactivation for lapsed donors, and post-gift stewardship sequences ran automatically from CRM triggers. Consent and preference management ensured compliance across jurisdictions.

- **Business Intelligence**
 - **Dashboards:** Real-time views of donation conversion, average gift size, recurring enrollment, campaign performance, and cohort retention provided operational and board-level insight.
 - **Attribution and funnel:** End-to-end funnel analytics—from email click-through to completed donation—identified friction points and high-performing segments.
 - **Data governance:** A semantic layer ensured consistent metrics definitions across teams.
- **Security, Privacy, and Operations**
 - Encryption at rest and in transit protected donor data. Backups, disaster recovery policies, and environment isolation supported resilience.
 - CI/CD pipelines with automated tests and vulnerability scanning enforced quality. Logging and monitoring surfaced exceptions for rapid resolution.

1.5 Results & Impact

- **45% increase in donation conversion:** The combination of a frictionless portal, localized experiences, and eight payment methods significantly reduced checkout abandonment and expanded donors' preferred payment choices.
- **20 hours saved per week in administrative work:** Automated gift processing, receipts, and recurring billing removed manual tasks and eliminated rekeying from spreadsheets. Finance benefited from faster, more accurate reconciliation.
- **Improved donor retention:** Personalized email journeys and segmentation increased engagement across new and existing donors. Targeted stewardship and timely reminders reduced churn among recurring donors.
- **Better data integrity and compliance:** A single source of truth with audit trails, consent management, and secure mail hosting elevated data governance and regulatory confidence.
- **Actionable insight:** BI dashboards enabled the team to quickly understand what works—by campaign, country, and donor cohort—and adjust strategies in near real-time.

Qualitatively, the fundraising team reported faster campaign turnarounds, fewer data firefights, and enhanced collaboration across fundraising and finance. The platform set a scalable foundation for future growth.

1.6 Technologies & Services Used

- **Services**

- crm-implementation: Origami CRM configuration, data modeling, automation, and security
 - web-development: Responsive donation portal with accessibility, localization, and secure APIs
 - mail-hosting: Authenticated domains (SPF/DKIM/DMARC), bounce handling, and compliant email infrastructure
 - business-intelligence: Dashboards, funnel analytics, and cohort reporting with a governed semantic layer
 - project-based-development: Milestone-driven delivery, UAT cycles, and change management
- Technical Components
 - Origami CRM with configurable entities, workflows, and role-based access control
 - RESTful API layer and webhook processor with idempotency and message queuing
 - Payment orchestration supporting eight methods, tokenization, and reconciliation automation
 - Automated email journeys integrated to CRM triggers, segmentation, and preference center
 - Data pipeline for ETL, deduplication, and address standardization
 - Security controls: encryption at rest/in transit, audit logging, environment isolation, CI/CD

1.7 Conclusion

By replacing spreadsheets and manual processes with a modern CRM, a high-conversion donation portal, and automated, personalized communications, the nonprofit transformed its fundraising operations. The solution delivered immediate, measurable gains—45% more donation conversions and 20 hours saved weekly—while strengthening donor relationships and data integrity.

The engagement demonstrates how a disciplined, project-based approach and targeted use of crm-implementation, web-development, mail-hosting, and business-intelligence can yield outsized impact for mission-driven organizations. With Origami CRM as the operational backbone and a scalable digital giving experience, the nonprofit is now equipped to reach more supporters, steward them more effectively, and direct more resources to its mission.

About The Origami Corporation

The Origami Corporation is a leading technology consulting firm specializing in cloud migration, DevSecOps, cybersecurity, and digital transformation. We help organizations navigate complex technological challenges and achieve their business objectives through innovative, secure, and scalable solutions.

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