Donors Correcting and Extracting for Client
Case Study

Tech2Globe
you authorize, we improvise!!

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About Client

It's simple: for nonprofits to be successful in their fundraising efforts, they need to know their prospects and donors they bundle the best wealth and charitable information in the industry into user-friendly software solutions. For over 25 years we've been developing these online solutions to help prospect researchers, fundraisers, and other development professionals.

Client Requirement

They wanted to outsource their donor correcting and extracting data entry project named Extraction and wanted a better partner who can give them prominent results and provide maximum solutions related to their extracting of donor's names from pdf docs assigned in there provided software named Quality Control.

Client Data Entry Challenges

- ❖ The largest challenge related to this project was the 99% quality of work to be presented.
- ❖ Expectation of consistent quality, to help deliver quality results.
- ❖ Target accomplishment on daily basis
    - • Extraction: - 2000 records per hour
    - • Sourcing: - 3 docs per hour
- ❖ Data formatting in Microsoft word using wildcards.
- ❖ Data formatting using pre-defined macros from client end.
- ❖ Most difficult part was formatting of data using wildcards in Microsoft word.
- ❖ Donor's gift type recognition for what purpose, a donation is done.

Tech2Globe Solutions

To ensure the project was completed accurately with quality, Tech2globe team make sure that we should complete the following: -

- ❖ **Training**: Solicited training from Client for the tech2globe team to ensure the donors formatting would be completed properly and targets to be achieved on daily basis.
- ❖ **Feedback**: Get relevant feedback once training finished before the project started for the team performance.
- ❖ **Training Doc's Samples**: Several samples were shared with Client before we started on real time project. These samples were first checked and then approved to start the project in full.
- ❖ **Team Strength**: Started with a pilot batch.
- ❖ **Reporting**: Reports were delivered to the client outlining the process and stages of performance throughout the project lifecycle.
- ❖ **Backup**: Backups were prepared by Tech2globe before the start of the project to prevent the downtime.
- ❖ **Safety and Data Security**: Optimal performance and minimal risk were covered to measures the safety and security of the large data. Used static IP's, secure email server, timely backup with Tech2globe internal Database.
- ❖ **Quality**: As their one of the major concern was the quality, so we have planned accordingly and give them a separate plan for the quality segment which has pilot batch for correcting donors entered in software, cross checking of doc's processed, internal quality analysis team, one project manager for the regular process improvement plans along with their team leader.

Technologies Used

- ❖ ABBY FINEREADER 12 PROFESSIONAL to convert image to text (word) format, this software works with text conversion and creates editable, searchable files and e-books from scans of paper documents, PDFs and digital photographs and for text recognition and document processing. New levels of speed and accuracy deliver unmatched recognition and conversion, virtually eliminating retyping or reformatting.
- ❖ Microsoft Office mostly use of Microsoft word and Microsoft Excel to format pdf docs.
- ❖ Use of Wildcards in MS word for formatting the data faster. Ex: - (\(*\)) used for removing all the text in brackets and many more.....

The Results

Because of the extra time spent to ensure training with the pilot batch, the following results were made possible for the project: -

❖ Tech2Globe team have managed to finish the training in just 20 days with the positive feedback from client end.
❖ Client's pilot batch have gained fair amount of confidence for the quality work along with the quantity analysing & finding the donor names from the organization docs assigned which results in better business outcomes and quick customer's queries handling.
❖ They are very much happy with the quality work and has managed to increase pilot batch into 8 person's team now.

Achievements

❖ Started with pilot batch for single project called Extraction and within 6 months we were asked to increase the team from pilot batch to 4 persons because of quality work provided.

❖ And after completion of 1 year, the great achievement was assigning a new project named Sourcing which was searching/finding of pdf docs from the organization websites which we further correct, extract and format in Extraction process.

❖ After getting trained for the new project "Sourcing" we were asked to increase team from 4 to 6 persons.

❖ At present Tech2Globe have 8-persons team for Extraction and Sourcing both projects.