

Swiss MS Society: Efficient fundraising and uncomplicated performance reporting

Challenges

Compilation and preparation of data from various source systems for analyses in the areas of non-profit organisation (NPO) controlling and fundraising / marketing as well as for the regular legally required preparation and provision of reports on services rendered to the Federal Social Insurance Office.

Solution

Implementation of Qlik Sense; direct connection of the CRM system SEXTANT and the case management software CASEnet to Qlik; implementation of iVIEW for ABACUS for the transfer of data from ABACUS to Qlik Sense; development and provision of various analysis applications for controlling, fundraising / marketing, management; implementation of NPrinting for the distribution of reports.

Advantages

- Linking data from different source systems
- Self-service BI and high analysis flexibility
- Significantly reduced analysis and reporting effort

© 2020 QlikTech International AB. All rights reserved. Qlik®, Qlik Sense®, QlikView®, QlikTech®, Qlik Cloud®, Qlik DataMarket®, Qlik Analytics Platform®, Qlik NPrinting™, Qlik Connectors™, Qlik GeoAnalytics™ and the QlikTech logos are registered trademarks of QlikTech International AB and have been registered in numerous countries. All other brands and logos used herein are trademarks or registered trademarks of their respective owners.

Solution at a glance

Customer

Swiss Multiple Sclerosis Society

Employees

65

Industry

Non-profit organisation

Region

Zurich, Lausanne, Lugano

Departments

Accounting, Controlling,
Fundraising, Management, IT

Partner

Informatec

System landscape

SEXTANT, CASEnet, Abacus

ROI & Time-to-value



Few weeks

for the implementation, data
model creation and provision
of the first applications



Massive reduction

of the effort for reporting to the
Federal Social Insurance Office

“As an NPO, it is essential for us to work as efficiently as possible. Qlik Sense allows us to prepare data much more easily and quickly. We can develop the solution independently, and there are no high follow-up costs due to the constant need for external support.”

Hanspeter Hassler, Information Technology & Data Processing, Swiss Multiple Sclerosis Society

The customer

The Swiss Multiple Sclerosis Society (MSG) is the first point of contact for people affected by multiple sclerosis, their relatives, volunteers, specialists and contacts on all topics relating to the disease multiple sclerosis (MS). Founded in 1959, it now has 15,000 members, is supported by 75,000 donors and operates in three centres in Zurich, Lausanne and Lugano. Under the motto “Making things better”, the MS Society is committed to providing various counselling options, services, events and financial benefits for those affected and their families. It also informs the public and raises awareness about MS and supports beneficial Swiss research projects on MS with considerable amounts of money.

Initial situation

The Swiss Multiple Sclerosis Society (Swiss MS Society) operates in a highly competitive fundraising market. More than 80 percent of the income comes from private donations. Efficient and professional fundraising is therefore important. The Swiss MS Society wanted to find out more in a more precise way, by means of suitable software, which measures were successful where and how. Up to now, the association made do with standard evaluations, Excel and a lot of manual work. The staff at the association also wanted to know more about their clients, i.e. people with MS, and the counselling services provided to them. “Until now, we could only provide standard evaluations using the respective software products”, reports Hanspeter Hassler, IT employee at the Swiss Multiple Sclerosis Society. “As soon as cross-system, more complex questions arose, it became much more time-consuming to find answers.”

CASE STUDY

The needs of the management with regard to the possibility of gaining a quick overview of controlling key figures had also increased. The association also had a need for optimisation in the creation of reports: The Swiss MS Society is not only financed by donations, but also receives public funds from the Federal Social Insurance Office (FSIO). Swiss NPOs must regularly account for the use of funds and the services provided in accordance with the agreed catalogue of services. Until now, this has been very time-consuming for the Swiss Multiple Sclerosis Society, and the necessary figures had to be painstakingly collected from various sources. “We wanted to find a more efficient way to evaluate data flexibly”, says Hanspeter Hassler. “As an NPO, we have to pay very close attention to the costs. It was therefore important for us to find a solution that would allow us to work as independently as possible without external support that would generate additional costs. Many solutions are very attractively priced at the time of purchase, but there are high follow-up costs for further development due to the complexity.”

Solution

The business intelligence software Qlik Sense convinced the association with its connectivity to various data sources, uncomplicated usability, high analysis flexibility and self-service BI capability. During the implementation of the solution, the MS Society was supported by Informatec, a Swiss IT service provider specialising in business intelligence solutions, which is very familiar with the special BI requirements of non-profit organisations: For example, Informatec has developed a BI solution for the Salvation Army Switzerland for the efficient management of fundraising and the brocki.ch second-hand shops belonging to the Salvation Army.

The CRM system SEXTANT and the case management software CASEnet were connected directly. Predefined data views are read in within both solutions. In order to transfer data and existing analyses from ABACUS to Qlik, the Qlik Extension iVIEW for ABACUS developed by Informatec was used.

The all-in-one solution Qlik NPrinting was implemented to provide evaluations in report form. It enables reports to be created from Qlik Sense apps and automatically distributed in various standard formats such as PDF, Excel, Word, PowerPoint and HTML.

Applications and benefits

The annual reporting obligation to the FSIO can be fulfilled by the Swiss MS Society now with a few clicks: Information on the number of counselling hours provided according to criteria such as subject area, cantonal affiliation of clients, etc. can be called up at the touch of a button. “It used to take us weeks to get all the

export information from the different data sources, link them in Excel and visualise them”, explains Hanspeter Hassler. “Now it’s done within minutes, and the high level of automation means that the reliability of the figures is also much higher than with the previous manual process.” If the FSIO has questions, a few minutes are all it takes to dive deep into the data and provide the answers. The fundraising activities of the association can be analysed in different depths and from different perspectives. The association sees exactly when, where and for which target group actions have taken place and what yield they have brought. “Comparisons between current and previous year’s periods or campaigns used to be possible only with some effort”, says Hanspeter Hassler. “Now they can be easily retrieved in Qlik Sense and visualised in a comprehensible way. Transparency has increased significantly. Many employees are only now seeing how much there is to learn from the data – because it is easier to link data and look at it from different perspectives.” Every month, the management and the division heads call up a report on the most important key business figures for NPO controlling on the basis of ABACUS data. KPIs such as income from donations, sponsoring and public grants, administration and reserve ratios, target/actual comparisons, etc. are available.

Future

The association is also migrating iVIEW for ABACUS to iVIEW DATAFLOW, Informatec’s most advanced workflow automation engine for data integration and management with Qlik. In future, the MS Society wants to use Qlik Sense for evaluations for settlements with the FSIO in the areas of events such as information events and relief weeks for those affected. In addition, further evaluations are planned in the area of counselling for people with MS. Other ABACUS data, such as personnel data, will also be made available in Qlik Sense.

“For us, Qlik Sense means making data visible – without effort and visualised in an understandable way.”

Hanspeter Hassler, Information Technology & Data Processing, Swiss Multiple Sclerosis Society