

Improving Donor Service Through Outsourced Lockbox and Exceptions Processing

As faithful stewards of donations earmarked for an organization's mission, fundraisers put great emphasis on achieving prompt receipting goals, and overall efficiency. That's why more and more fundraisers are looking toward outsourced lockbox services with image-based capture, management and delivery of donations. This presentation will show how fundraisers are using next-generation outsourcing services to eliminate time-consuming manual keying of donor information; streamline the process of preparing receipts for donors (critical for not-for-profit organizations); control cash donations sent through lockbox; improve their ability to research and find donation information; automate exceptions handling; and more.

At the conclusion of this session, participants will understand:

- a. The donations processing challenges facing non-profit organizations
- b. The process for evaluating next-generation lockbox providers
- c. The benefits of working with a provider that specializes in exceptions
- d. Key elements of the business case fundraisers have achieved in working with next-generation outsourced lockbox and exceptions processing providers
- e. Trends in lockbox/exceptions processing in the not-for-profit market

Intended Audience: Entry level, Mid-level, Senior level, General Interest