

## 4 Real-world use cases for Intelligent Automation in the Not for Profit Sector.

How digital labor can help  
Not for Profit organizations.



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## A New Approach.

The Not for Profit sector exists to provide support and services for vulnerable members of society. Your main aim is to help alleviate the many issues in the world whilst also facing the same challenges as large corporations, but without the big budget to implement solutions.

The struggles your organizations are coming up against are multi-faceted: from traditional income generation and regulation, to service delivery and digital transformation. First and foremost, you have to think about how to generate the income needed to deliver the essential services required – through both voluntary and paid staff - while also working to think of ways to diversify income and embrace a range of new fundraising opportunities.

This is why you, as a Not for Profit organization, must take a new approach. Not simply a digital, or technological approach, but rather changing the way you resource to deliver services for productivity and efficiency gains; enabling you to do more and achieve more. In order to expand on the services you provide without having to put further strain on, or adding to, your existing workforce, you must consider the benefits of Intelligent Automation.



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In this ebook, we'll provide you with real world examples of Intelligent Automation for the Not for Profit sector and how these use cases can help you to overcome everyday obstacles, and make every penny of your income count.



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# What is Intelligent Automation?

Automation comes in many forms, each performing human actions, with the end goal of minimizing administrative strain on the human workforce.

Intelligent Automation, in the form of digital labor, combines Artificial Intelligence (AI) capabilities with traditional Robotic Process Automation (RPA) and Cloud technology to emulate the actions of humans carrying out office-based work: freeing your employees from the repetitive, time intensive tasks that slow them down.

As distinguished from RPA alone, digital labor can carry out more than a simple structured task. The result is a solution which is wide in intelligent capabilities and not limited to any specific area of a business: helping you to overcome obstacles in a range of areas.

## What does this mean for the Not for Profit sector?

The emergence of digital labor means that Not for Profit organizations have essential and scalable resource at their disposal. Intelligent Automation provides organizations with a flexible pool of digital workers which transform the way a business can function. It creates new efficiencies for organizations, by blending human and digital labor. This frees up staff from repetitive and time-consuming work, so you can take a new approach and evolve the way you think about delivering your charitable services.



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## 4 Real-world use cases of intelligent automation in the Not for Profit sector.





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## 1. Hassle free onboarding of volunteers with Intelligent Automation

### Full checks in place

From safeguarding to regulation, volunteers have to go through a number of levels of checks in order to take part. The process for onboarding usually follows a similar route across most organizations. Somebody enquires about a volunteer role, following on from that the candidate is either asked to take part, or rejected for one reason or another. If successful, the HR manager will need to start the onboarding process. This includes but is not limited to; police checks, login details, IT onboarding, payment system set up, HR system data entry, rights to work checks, day one introduction, policy information and continuous contact updates.

### Cost significantly reduced

The cost of onboarding volunteers for both large and small Not for Profit organizations is significant. Intelligent Automation can substantially reduce this cost. Once a person sends in an application for a volunteering role, a digital worker can be activated to perform each step of the task, utilizing a mix of technology from Natural Language Processing (NLP) to Intelligent Optical Character Recognition (iOCR), to read, write and communicate with the volunteer through every step of the process. The result is a volunteer onboarded without error and with full checks in place.



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## 2. Reclaim Gift Aid through automation and reinvest your time and money on more value-added tasks.

The Gift Aid scheme - introduced in the finance act in 1990 in the UK - is undoubtedly a brilliant idea and one that means charities get that little bit extra. However, for some charities claiming Gift Aid from HMRC is a time consuming and data intensive exercise, putting resources under undue pressure. Large organizations can afford to employ teams of admin staff doing this, but arguably they could be put to better use. For smaller charities, the administrative strain means that they simply don't collect gift aid because they can't afford to resource the process. And this is where Intelligent Automation could help.

A digital worker can be set up to access all of the personal details required by HMRC from multiple systems if necessary – title, full name, address details, event and donation etc. It can be set up to enter 1000 data details in line with the HMRC limits and then start the process again. Not only does it significantly reduce the cost of claiming, it also removes the risk of human error in the work, can perform it at machine speed and free your admin team to perform more pressing value-added tasks. A process which is prime for automation for both large and small Not for Profit organizations alike.



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### **3. Increase your fundraising efforts by investing in digital workers to integrate 3rd party platforms.**

The likes of Just Giving and Virgin Money play a fundamental role in making charitable giving accessible to the public. However, it is well known that many Not for Profits don't have the ability to easily integrate these platforms with their internal systems. This means that human intervention is needed to log into each individual system and manually input data from one system to another, or spend time dedicated to reconciling data. This can often be a time consuming, costly and error prone exercise – eroding the full value of the fundraising efforts.

This is an ideal process which can be completed by a digital worker, alleviating this monotonous work from existing staff and make sure 100% accurate data entry. By letting the digital worker login, pull the information and input it into various systems, Not for Profit organizations have been able to recruit an additional 5 public fundraisers each week. Together, these new recruits could generate between £10,000 and £60,000 between them and provide a fast and significant return on investment.





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## 4. Flex your use of digital workers to manage your seasonal donation peaks.

Given that charitable donations can be up by 11% around Christmas time and down by the same amount in the Summer, it's no wonder that Not for Profits can struggle with resourcing for their peaks and troughs.(1)

In order to address this issue, many Not for Profits will either resource at 90% capacity or hire untrained temporary staff to cover the peaks in workload. Neither of which is conducive to efficiency or cost. Aside from the standard benefits of digital labor, such as no human error, machine speed processing and the ability to work 24/7 — they also have the many benefits of being

deployed from the cloud. Due to the nature of cloud technology, digital labor can flex to meet demand and can take peaks in demand in its stride. This results in the ability to right size your departments and save on resourcing costs. Not to mention, having the incredible efficiencies delivered by digital labor, so when the money comes flooding in you are ready to handle it.

(1) <http://www.cgap.org.uk/uploads/Briefing%20Papers/CGAP%20BN3%20Seasonal%20Patterns.pdf>



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## Helping you do more.

For your Not for Profit organization to deliver essential support and services, scale support and be effective, you must take new approaches to resourcing. By using digital labor within your organization, you can address challenges, enhance operations and keep delivering vital charitable work to the world in the future.

No matter your size, you no longer need to endure the challenges you face without help. These real-world examples of Intelligent Automation application have outlined the possibilities of automation for you to do more. Whether you are a small organization or have peaks of donations throughout the year, digital labor can give staff time back to help on the frontline of your chosen cause. Digital labor is so much more than a simple technology deployment. Instead, it is a resource to help you do more and achieve more.

Now is the time for your organization to explore how digital labor could help you. Together with our partner human+, we're ready to help you make every donation count – get in touch with us to see how we can help you do more today.



## About Blue Prism Cloud

Blue Prism Cloud, previously known as Thoughtonomy, delivers an artificial intelligence (AI) driven intelligent automation platform that enables organizations and the people they employ to do more and achieve more. A leading provider of intelligent, cloud-based automation, the company's award-winning Software as a Service (SaaS) platform gives companies access to a pool of cloud based intelligent digital workers that can perform the repetitive, time-intensive tasks that slow people down. By integrating this digital workforce with their human teams, companies can accelerate growth and achieve a step change in efficiency. Blue Prism Cloud has grown at a rapid rate since being founded in 2013, with more than 200 customers using its platform in 29 countries spread across four continents. In 2019, Blue Prism acquired Thoughtonomy, to add the SaaS offering into its wider Connected-RPA portfolio. Visit [cloud.blueprism.com](https://cloud.blueprism.com) to learn more.



## TPX human+

The robotic process automation partner for government and Not For Profit. Our belief is that the success of Robotic Process Automation relies on engaging stakeholders, implementing the right technology in a holistic way and enabling the humans central to its adoption. Our goal is to drive efficiencies across the organisation and create a self-sufficient centre of excellence for the future, while helping people focus on more interesting, business-critical work. TPX human+ was born out of the Automation practice of TPX Notbinary, renowned pioneers in solving complex digital challenges for the public, private and third sectors.

We're a part of The Panoply, a world-class group of creative technology companies, helping organisations redesign today and invent tomorrow.