

DELIVERING DIGITAL

Unlock the power of data with
digital transformation solutions.

We bridge the gap between physical and digital data.

Meeting Challenges

1

Remote Working

The transition to flexible working arrangements presents real data challenges. Managed correctly, it can reduce costs and improve efficiency.

2

Unlocking Data

Organisations archive huge amounts of data through years of operating. Digital investment can leverage physical records to generate greater revenue.

3

Flexibility & Adaptation

Life is now more dispersed. Prioritising flexible and adaptable approaches for teams and clients will gain competitive advantage in the market.

Chaffinch delivers digital transformation solutions which optimise the use of data within organisations to achieve real productivity improvements.



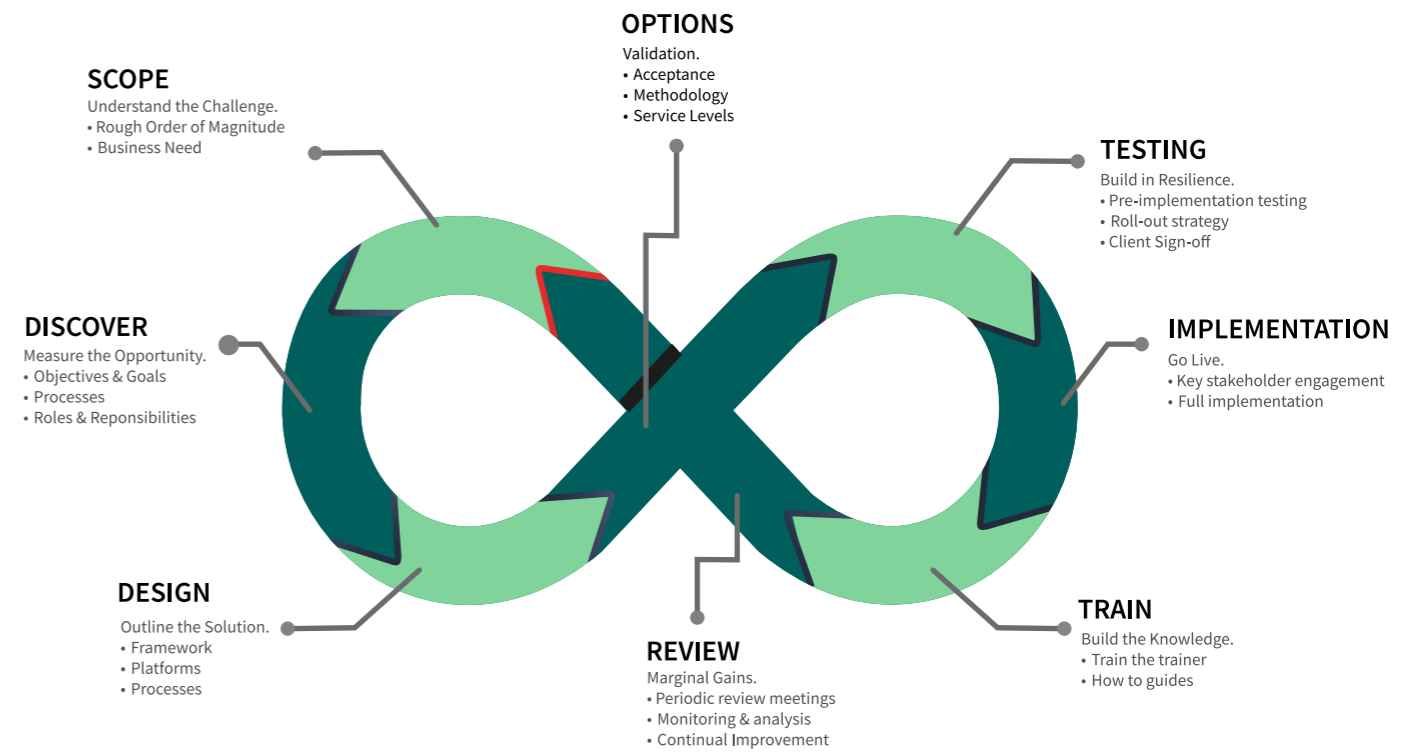
“A survey of directors, CEOs, and senior executives found that digital transformation (DT) risk is their #1 concern. Yet 70% of all DT initiatives do not reach their goals.”¹

Digital Transformation Is Not About Technology
 by Behnam Tabrizi, Ed Lam, Kirk Girard, and Vernon Irvin
 – Published 13 March 2019

Our Approach

Investment in achieving digital goals requires an evolutionary approach. No organisation regardless of size can, or should, write blank cheques for large capital expenditure on digital investment, without being sympathetic to the wider context.

Chaffinch approaches digital transformation with a start-up mentality. Agility and flexibility lie at the heart of our solutions. Return on investment must be demonstrable and delivery service improvements to customers.



Our Process

- 01 Scope**
 Identify the challenge which needs to be solved, and measure the impact it has on the organisation.
- 02 Discover**
 Understand the processes in place, define the objective and begin working with key stakeholders.
- 03 Design**
 Outline the solution and the basis it is built from, how it interacts within the organisation and its processes.
- 04 Options**
 Present validated options in detail, refine the processes and gain acceptance from all stakeholders.
- 05 Testing**
 Testing of the solution prior to full implementation, securing full-sign off ready for roll-out.
- 06 Implementation**
 Full implementation of the solution, engaging with key stakeholders to begin successfully applying it in the organisation.
- 07 Train**
 Train the key users, offer how-to knowledge to ensure maximum effectiveness with all colleagues and users.
- 08 Review**
 Seek continual improvements by monitoring and analysing key metrics.

Key Factors

01 Funding model and strategy

Any investment in digital is unlikely to succeed if it requires big changes to an organisations' business model in order to be fully implemented. Strategy can evolve as implementation is rolled out, but must be adaptable to market conditions.

02 Workforce.

Too often, organisations implement a digital strategy without involving the people actually doing the work day-to-day. Without full buy-in from the people who have intimate knowledge of what works and what doesn't, a transformation initiative is likely to fail.

03 Goals.

What exactly are you seeking to achieve? Ultimately, a blanket one-size-fits-all or "big bang" approach rarely succeeds. Identifying key priority areas and seeking incremental and continuous improvements offer higher chances of success.

04 Customer Needs.

A successful digitisation strategy is built around serving customers better. The customer must be at the centre of the transformation journey. Digitisation must be careful not to alienate or exclude key customer demographics.

05 Culture.

Often overlooked but absolutely vital in any digitisation initiative, workplace culture is the difference between success and failure. Failure to overcome fear and outline goals to employees risks gaps in implementation.



Our Services

Gift Aid Scanning

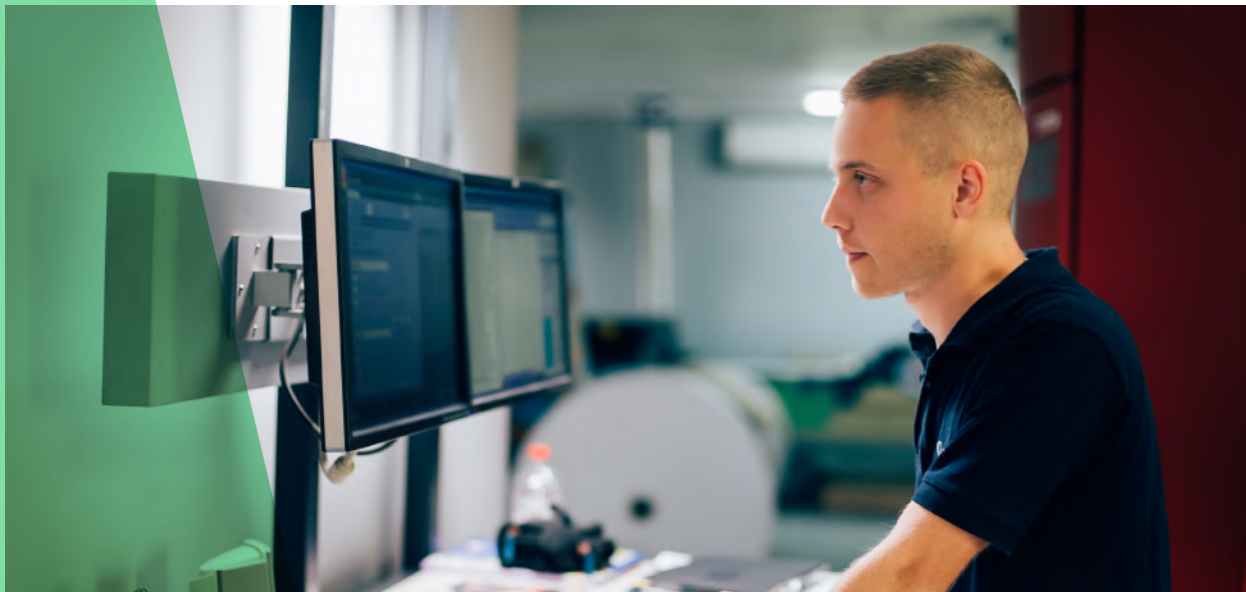
Digitisation of Gift Aid forms maximises donations and ensures compliance with the relevant tax regulation. Paper-based forms are transformed into digital files and imported into your database, offering major efficiency improvements.

BENEFITS:

- 01 Compliance with HMRC-audits by the provision of copies of valid Gift Aid forms.
- 02 Database verification to confirm donor data is processed correctly.
- 03 Reduces the risk of a costly data breach or loss from handling physical forms.
- 04 Smart identification of data or declaration gaps through referencing donor database.
- 05 Identification of previously unclaimed Gift Aid reliefs which can be claimed from HMRC.

Example

A children's charity scanned over 400,000 Gift Aid documents, and the digital files directly imported into their Donorflex database. Workflows were created to handle both in-house and 3rd party provider fundraising forms, and substantially reduced the burden of keeping HMRC-compliant copies.



Data Capture & ICR

We provide data capture, Intelligent Character Recognition software and smart form design extract and verify data from your paper-based forms. Digital-only solutions are difficult to implement without excluding some donor demographics.

BENEFITS:

- 01 Improves compliance with Data Protection regulation when processing forms.
- 02 Facilitates digitisation without alienating key donor demographics.
- 03 Smart form design improves the efficiency and accuracy of data collection.
- 04 Reduce costs and operational challenges by reducing human verification required.
- 05 Improve data security with integration into databases and hosted EDM solutions.

Example

A high-profile botanical charity was seeking to transition away from manual processing and verification of donor forms by office-based volunteers, due to data protection and remote-working challenges. Our smart form design and software provides ICR-rendering of forms which has reduced the human input by over 85%.



Document Management

Electronic document management and workflow automation solutions provide charities with greater power over their data. Documents are hosted securely on enterprise-grade cloud servers, yet accessible at anytime from anywhere.

BENEFITS:

- 01 Rapid return on investment measured in months rather than years.
- 02 Accessible and cost-effective for all sizes of charity, yet scalable for larger organisations.
- 03 Collaborate and manage files in real-time, with full audit trail.
- 04 SAAS-subscription model which can work alongside business management systems.
- 05 Reduces the risk of data breaches with GDPR-compliant audit trail of log-ins and views.

Example

A major provider of hosting and document management services to the charity markets withdrew services from the market at short notice. Chaffinch developed a cloud-based solution to seamlessly transfer and manage data from the previous platform, offering rapid return on investment for the organisations affected.



Digital Mailroom

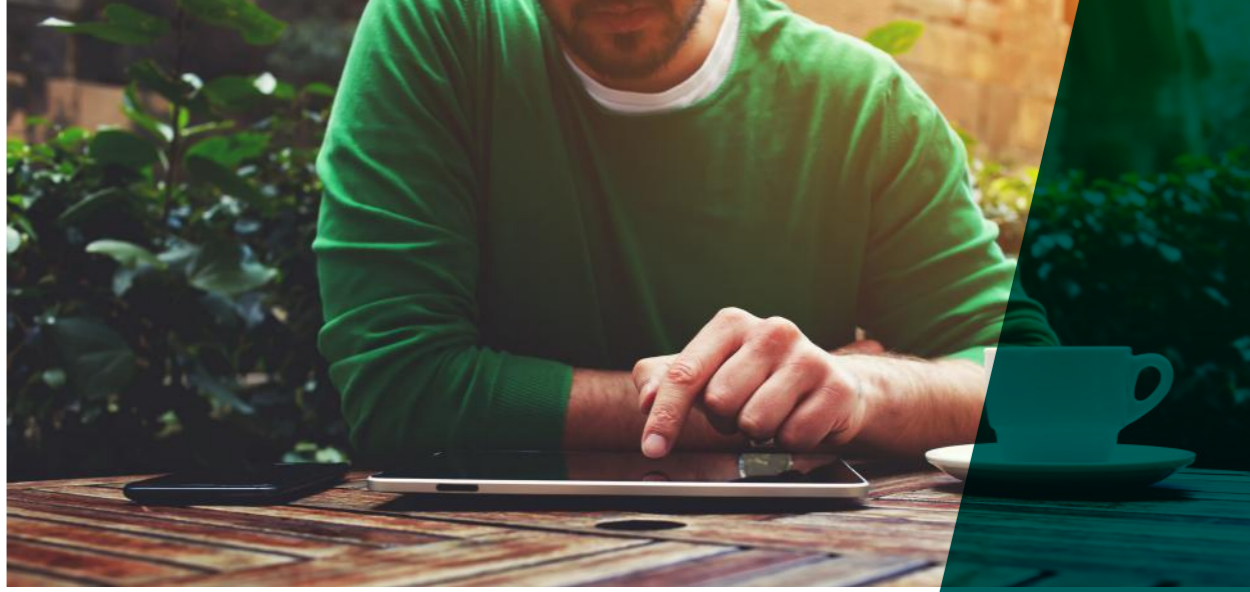
Remote working arrangements accelerate the need to modernise processes. We provide your employees access to daily incoming mail, wherever they work from. Digitised mail is distributed to the correct recipient after being categorised, scanned and indexed.

BENEFITS:

- 01 Save money by reducing the staff time spent handling and distributing mail.
- 02 Respond more quickly by integrating information into existing business systems.
- 03 Reduces the risk of Data Protection breaches or losses.
- 04 OCR technology reduces human intervention, captures data faster and more accurately.
- 05 Underpins a paper-light strategy by eliminating incoming paper at source.

Example

Chaffinch can support charities who are offering employees flexible working arrangements by developing digital workflows to quickly and efficiently digitise, categorise, index and upload incoming communications. Our hosted-EDM solution allows mail to be directed to via your dedicated PO Box.





About Us



Our Accreditations



Key Facts

donorflex

Approved Partner
to Donorflex

80+

Charity Customers

100m+

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Since 2011, Chaffinch has delivered industry-leading records transformation services that are available to businesses and organisations of all sizes.

The records management industry has historically been characterised by inertia, vested interests and those seeking to tie in customers. We are disrupting that situation.

We bring a start-up mentality to data management. We ask questions, analyse, review, reinvent or repurpose the status quo.


We believe that innovative and modern data management services should be accessible to all businesses and organisations, regardless of size or industry. We offer digital transformation benefits to multi-national PLCs, national organisations and local independent operators.

Our services are delivered by our expert team, with a combination of software partners and proprietary technology giving access to a global knowledge-base.

The new world of work will embrace remote employees, local supply chains and global customer-bases. We help our customers unlock and leverage the power of their data to achieve cost savings and increase profitability.



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