



WARDY IT Solutions helps Smart Health Australia reveal consumer behaviour insights with Power BI

## Executive Summary:

Smart Health Australia is an award winning ethical fundraising services provider that, for nearly twenty years, has been raising millions of dollars for some of Australia's largest hospitals and charities. The leadership team at SHA sought help to optimise fundraiser and campaign performance by collaborating with WARDY IT Solutions to enhance analytical tools and skill-sets. The organisation solved a series of analytical challenges working with the professional team at WARDY IT Solutions.

- Having access to performance analytics in real-time allows SHA's leadership team to quickly adapt campaign strategies to further enhance performance
- Tracking fundraiser performance in real time has allowed SHA to identify and adapt training regimes in order to achieve optimal outcomes with donors
- Data visualisation using Power BI enhances management's ability to quickly respond to campaign outcomes
- The ability to identify donor behaviour has further enhanced SHA's campaign forecasting and enabled SHA to refine donor management strategies

## Client Challenge:

WARDY IT Solutions was invited to review data solutions that would help to maximise the ROI SHA offers to their not for profit clients.

## About Smart Health Australia:

- Established in 1997
- 80 employees
- Services
- Melbourne, Victoria, Australia
- [www.sha.net.au](http://www.sha.net.au)



Smart Health Australia (SHA) have built a formidable reputation over their nineteen years of operation helping non-profit organisations raise funds to assist those most in need. Headquartered in Melbourne, Australia, SHA provides telemarketing and consultative services to a select group of leading organisations involved in delivering better community outcomes and saving lives. The award winning fundraising agency is committed to the highest professional and ethical standards. SHA delivers tailor-made fundraising campaigns focused on enhancing donor loyalty, retention, and building long-term donor relations whilst increasing the charities' fundraising revenue.

Our systems and processes help us to realise the best results for our customers. Our effort delivers measurable benefits for many who need a helping hand. As a strategic partner, WARDY IT Solutions is there to help us achieve the best outcomes for our clients.

Michael Copsey  
IT Director Smart Health Australia

## Solution:

WARDY IT Solutions reviewed how SHA should harness their vast repository of knowledge to reveal deeper consumer insights and realise increased returns for their clients. An 'on-site needs' evaluation workshop was facilitated by WARDY IT Solutions' analysts, and an in-depth understanding of SHA's business metrics was gleaned. During a series of workshops, a review of the key performance indicators from previous campaigns were identified. Based on these parameters, scripted data cubes and comprehensive data sets were clearly defined. SHA's leadership group was presented with visualisations for detailed analysis. The results showed that by correlating disparate data, new insights into campaigns were revealed. By analysing successful campaigns as well as those that failed to meet expectations, management could apply these observations to enhance future campaign performance.

## Implementation:

SHA began the transformation by unlocking knowledge held within their files and archives. The technical term is Business Intelligence: gathering, storage and analysis of business data from which insights can be drawn and valuable Intellectual Property (IP) yielded. They correlated their historical data sets and formatted this data for visual and interactive presentation. Tighter integration of SHA's Office 365 system with Power BI enabled data to be visually presented in a clear, easily understood format. WARDY IT Solutions helped with application implementation and advanced analytics training on how to go to the next level to decipher meaningful knowledge from SHA's data sets.

## Outcome:

The results were immediate, with historical campaigns analysed to identify why some exceeded expectations but others underperformed. The clarity of the insights surprised the leadership team and completely justified the company's time investment. The raw data provided the knowledge scaffolding that facilitated visualising the campaign results and showed the relationships between connected data sets. When SHA and WARDY IT correlated this information, it was revealed that even minor variables make a critical difference to the campaign's results. Integrating the new Power BI capability yielded greater fundraiser, and employee, productivity and enabled management to fine-tune campaigns in real-time.

## Technical Overview:

The core of the solution was built upon Microsoft's Power BI. The application enabled SHA to search and explore their data from within Excel and work seamlessly with SHA's Office 365 cloud applications. This simplified creating interactive 3D modelling and visually representing complex relationships. Power Map enabled this data to overlay with target maps and create granular demographic presentations that assisted delivering targeted campaigns.

## Conclusion:

Australia is among the world's most charitable nations, but competition for donor largesse is intense. By harnessing the power of Business Intelligence, SHA is transforming its business processes and looking to re-invent its business model.

## Products and Services:

- The benefactors of SHA's efforts can effect great changes in their lives thanks to the initiatives and activities undertaken by SHA and their non-profit clientele
- An injection of confidence has seen staff morale soar and improved SHA's business outlook
- New ways of delivering greater value with existing resources have taken on a new urgency as SHA now master the BI tools to execute against their strategic plan
- SHA is staffed by passionate people who are reinventing how stakeholders are engaged with.

## About WARDY IT Solutions:

- SQL Server Business Analytics
- SharePoint Integration and Visualisation Services
- Power BI and Office 365 Integration
- CRM Integration Services

WARDY IT Solutions is Australia's leading SQL Server and Business Intelligence specialists. The company creates solutions that enable businesses to maximise returns on their investment in knowledge management. Through the extensive use of Business Intelligence, WARDY IT Solutions helps their clients realise the best possible dividend from their data assets. WARDY IT Solutions has received numerous industry accolades, most notably the prestigious Microsoft Global Platform Partner of the Year in 2013. The organisation is recognised internationally for their innovative solutions, training skills and unwavering commitment to education and furthering the interests of the broader Microsoft SQL Server community.



### Contact Us

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### About WARDY IT Solutions

WARDY IT Solutions is a highly awarded global leader that helps clients realise the best return on their Business Intelligence investment.

### Our Competencies

- Microsoft SQL Server Consultants
- Microsoft SQL Business Intelligence
- SQL Server Training and Support
- Virtual DBA