

klevr

CREATING MORE TIME FOR MEANINGFUL DONOR CONVERSATIONS

A KLEVR CASE STUDY

walkerscott

CLIENT

Legacy Club Services

LEGACY

Legacy Club Services supports the families of Australian veterans through a range of programs and services, including financial assistance, education support, social connection, counselling and advocacy.

For **Giving Day 2026**, Sydney and Tamworth Legacy Clubs delivered their one day fundraising campaign designed to raise vital funds for veterans' families. The campaign used matched giving to maximise community support, with participating Matching Partners matching donations dollar-for-dollar.

The campaign centred on a 12 hour fundraising window, with donations accepted online and over the phone. Supporters could also register in advance to receive a call from their local Legacy Club on Giving Day, making volunteer and staff donor conversations an important part of the campaign.

THE BRIEF

Supporting donor outreach during a critical fundraising event.

Giving Day relied on staff and volunteers being able to efficiently connect with supporters during a concentrated 12 hour fundraising period.

Call lists, caller assignments, outcomes and follow-up activities needed to be managed securely and accurately, while ensuring administration did not get in the way of meaningful conversations with donors.

Legacy Club Services wanted a simple solution that would:

- Make the calling experience easier for volunteers and staff
- Securely manage assigned donor lists
- Track call outcomes and completed calls
- Support rescheduling and reassignment where needed
- Reduce administrative effort during the campaign

The goal was straightforward:
reduce administrative effort so volunteers and staff could spend more time engaging with supporters during Giving Day.



Solution

A dedicated Giving Day calling portal.

To support Giving Day 2026, Walkerscott contributed approximately one week of professional services on a pro bono basis to design and deliver a dedicated calling portal that supported staff and volunteers throughout the campaign.

The portal provided a simple and secure way to manage donor outreach activities during the fundraising event.

Key capabilities included:

- Secure volunteer login
- Access to assigned donor lists
- Recording call outcomes
- Marking calls as completed
- Call rescheduling
- Reassignment of calls where required

The solution was delivered within Legacy Club Services' existing Microsoft and fundraising ecosystem. Walkerscott was able to rapidly deliver a practical solution aligned with established fundraising processes.

Rather than introducing additional complexity, the portal was purpose built to remove administrative effort from the donor calling process, enabling staff and volunteers to spend more time focused on supporters and less time managing call lists and follow-up activities.

Rapid delivery focused on a practical outcome.

Drawing on its existing understanding of Legacy Club Services' fundraising operations and Dynamics 365 environment, Walkerscott delivered a targeted solution specifically designed for Giving Day.

The result was a purpose built calling portal that supported a smoother volunteer experience and helped keep the focus on donor conversations.

Results

Giving Day 2026 exceeded expectations, raising approximately $184,000 and surpassing its fundraising target of $150,000 by $34,000.

Staff and volunteers reported that the calling experience was significantly easier than the previous year, helping them spend less time managing administration and more time engaging with supporters.

"The new calling portal also streamlined the Giving Day process, reducing the administrative burden and creating a more effective experience for the fundraising team."

Mitchell Watson - Director Fundraising, Marketing & Communications

Working with Walkerscott

Walkerscott has partnered with Legacy Club Services since 2023, supporting its Microsoft Cloud for Nonprofits implementation and ongoing Dynamics 365 Customer Engagement environment.

The broader relationship has included work across Microsoft Cloud for Nonprofits, Klevr Grants, Klevr Portal, Stripe donation capability and Fundraising and Engagement.

While Giving Day was a relatively small technology project, it demonstrated how targeted digital solutions can support important fundraising outcomes.

By simplifying the donor calling process, Walkerscott helped staff and volunteers focus on what mattered most: **meaningful conversations with supporters.**