

FRED HOLLOWS MODERNISES DONOR MANAGEMENT WITH MICROSOFT DYNAMICS 365 & KLEVR FUNDRAISING

CASE STUDY

CLIENT

Fred Hollows Foundation

The Fred Hollows Foundation

The Fred Hollows Foundation is a global eye health and international development organisation dedicated to ending avoidable blindness.

Continuing the legacy of the late Professor Fred Hollows, the Foundation works in more than 25 countries across Africa, South Asia, the Middle East, South East Asia, the Pacific and remote Australian communities, restoring sight, training local health workers, and delivering affordable, high quality eye care to people who need it most.

Challenges

Replacing a legacy fundraising platform without disrupting donors, while modernising donor management and fundraising operations.

The Fred Hollows Foundation had relied on their legacy platform for fundraising and donor management for more than two decades. As the organisation evolved, the system increasingly struggled to meet the Foundation's fundraising, engagement, and operational requirements.

As fundraising activities expanded across multiple countries, currencies, and channels, the Foundation recognised the need for a more flexible and scalable platform capable of supporting future growth while reducing operational complexity.

The organisation required a modern fundraising CRM that could:

- Support high volume recurring giving
- Enable multi-country and multi-currency fundraising
- Improve data integration and automation
- Deliver modern donor experiences
- Provide a scalable foundation for future innovation

Alongside these requirements, the Foundation carried decades of **extensive donor and gift history, together with a substantial regular giving programme.** Ensuring continuity of donor payments and fundraising revenue throughout the migration was critical.

Walkerscott was engaged to deliver a safe migration from the Foundation's legacy platform to a modern Microsoft based fundraising solution, ensuring minimal disruption to donors, fundraising teams, and day-to-day operations.

"The biggest risk is revenue loss. The donor should never know that you've transitioned CRM... no double debiting, no debits changing overnight."

Chris Thomas, Head of Business Systems & Integration,
The Fred Hollows Foundation



Solution

Walkerscott worked with The Fred Hollows Foundation to replace its legacy platform with a modern fundraising and donor management solution built on Microsoft Dynamics 365 and Klevr Fundraising.

Following an evaluation of available fundraising technologies, the Foundation selected Microsoft Dynamics 365 as the foundation for its future fundraising platform, supported by Klevr Fundraising's purpose built nonprofit capabilities.

The new solution was designed to support:

- High volume recurring giving
- PCI compliant payment processing
- Multi-country and multi-currency fundraising
- Modern donor engagement
- Extensibility and long term support
- Streamlined data integration and automation
- Improved operational efficiency

Klevr Fundraising CRM built for global scale and fundraising complexity.

Klevr Fundraising was implemented to support one of the largest nonprofit donor ecosystems in the region:

- A large and complex donor database
- Extensive historical gift and transaction data spanning decades
- A significant regular giving programmee
- Multi-currency and multi-country fundraising operations
- PCI compliant payment processing and secure tokenisation
- High volume recurring giving and payment batching
- Data ingestion from multiple vendors including face to face agencies, telemarketing partners, online channels and banks

How Walkerscott delivered a safe migration from a legacy platform.

Migration to Dynamics 365 & Klevr Fundraising

Walkerscott delivered a structured migration to Dynamics 365 and Klevr Fundraising, ensuring continuity across donor, gift, payment, and recurring giving processes.

Recurring Giving & Payment Batching Architecture

The Foundation's legacy fundraising environment required significant manual effort to support high volume recurring giving. Walkerscott designed a payment batching architecture within Klevr Fundraising to support monthly donation volumes while ensuring zero donor disruption.

"Single API was not going to work... Walkerscott worked with us to introduce payment batching."

Chris Thomas, Head of Business Systems & Integration

PCI Compliant Payment Processing

Walkerscott ensured end-to-end PCI compliance, including secure tokenisation directly with payment providers, a critical requirement for nonprofits processing high volumes of transactions.

Multi Source Data Importing & Cleansing Pipeline

Walkerscott built a robust staging and data cleansing architecture using the Microsoft Power Platform:

- Custom staging app for Excel-based data templates
- Power Automate flows for contact, gift, and schedule creation
- Dataflows for cleansing and address validation
- Automated creation of contacts, gifts, payment schedules, and payment methods
- Support for multiple vendor formats

Agile Delivery & Strong Governance

Walkerscott and the Foundation adopted an agile, iterative approach with strong governance, early user story sign off, and a disciplined SteerCo model throughout the project.

"We built data flows that cleanse the data... Power Automate would check if the contact exists, create the gift, create the payment schedule, link them together."

Chris Thomas, Head of Business Systems & Integration





Results

The Foundation now operates on Microsoft Dynamics 365 and Klevr Fundraising, replacing its legacy environment and providing a scalable foundation for future growth.

Zero donor disruption during migration

No double debits, no missed payments, and no donor confusion, despite migrating millions of records and a large-scale regular giving programme.

Better donor experiences and modern fundraising capabilities

Klevr Fundraising now provides:

- Modern donor journey management
- Streamlined recurring giving
- Faster, more accurate payment processing
- Improved data quality and automation
- A significantly better user experience for fundraising teams

Consolidated fundraising pipelines globally

Philanthropy teams now have a single view of donors, gifts, and pipelines across multiple countries.

Modern data architecture enabling future AI and Fabric adoption

With clean, structured data, the Foundation is now positioned to adopt Microsoft Fabric, Copilot, and AI agents.

Strong user adoption and continuous improvement

Post go live, teams are actively requesting enhancements and optimisations, a sign of strong engagement and confidence in the new system.

Working with Walkerscott

A partner who understands nonprofits and the intricacies of fundraising

The Foundation emphasised that selecting a partner was "effectively a marriage", requiring cultural alignment, flexibility, and deep technical expertise. Walkerscott supported the Foundation through:

- Product selection and migration from legacy platform to Dynamics 365 and Klevr Fundraising
- Architecture design for recurring giving and payment batching
- Data migration, cleansing, and staging
- Agile delivery and governance
- On site hypercare and ongoing support

"Walkerscott were flexible in their approach... we had bumps in the road, but they worked with us to get the process really working well... If it's anything related to payments, we don't touch that... we leave that with Walkerscott."

Chris Thomas, Head of Business Systems & Integration