

■ CriticalRiver's Salesforce Community Cloud Solution Helps a Non-Profit Better Serve Its Constituency and Eliminate Manual Processing

A California-based non-profit implemented Salesforce Community Cloud to enhance candidate / awardee communications and manage fundraising events. The application, as originally configured, was not providing the organization the transparency into candidate/awardee activity that was needed, nor was it integrated with multiple external event management applications the company utilized

Solution

Working in partnership with a company that helps non-profit organizations use technology to improve their operations, CriticalRiver:

- Migrated the organization's Salesforce applications to the Lightning platform
- Created a new Salesforce Communities solution that centralized data, helping the organization staff work from a shared base of knowledge
- Implemented an integrated solution to manage event data centrally and share it across disparate event management systems such as Cvent
- Implemented award referral, nomination and grants management functionality.
- Integrated with the organization's website (WordPress) to handle organization and campaign member management

Benefits/Results

- The non-profit has been able to adopt Salesforce as its primary database for managing relationships within its network
- Staff members now have a comprehensive view of their network, including sponsored event attendance, referral history, grant history, and meeting notes
- Candidate and awardee organizations can now view their profiles through the platform and submit updates as often as they'd like, rather than emailing documents
- Cumbersome manual re-entry of information between event management systems has been eliminated (Reduction of 10,000+ man hours annually)
- The customized solution for capturing conversations and meetings enables staff members to be aware—in real time—of progress, challenges, and opportunities presented by its network

The customer is a private foundation with a mission to drive large-scale change by investing in, connecting, and celebrating social entrepreneurs and other innovators dedicated to solving the world's most pressing problems. It makes grants totaling about \$40 million each year.

Industry: **Non-Profit Organization**

Solution Components:

- Salesforce Communities
- Salesforce Lightning

Customer Feedback:

"CriticalRiver has helped us truly capitalize on our investment in Salesforce to improve our marketing effectiveness and streamline our interactions with donors, candidates and awardees."

