

# CriticalRiver Transforms BITSAA's Alumni and Donor Management with Salesforce NPSP Integration



## The Challenge

BITSAA dedicated works with 150,000+ alumni base of BITS Pilani and an ever-growing number of donors to interact, engage and manage all fundraising and donations. The existing system of fundraising donations management is not unified on a single platform. It works on manual/disparate systems without any cohesive approach or engagement between BITSAA, donors, and alumni. This resulted in excessive delays, inefficient processes, loss of crucial data, lack of effective communication, and no real-time updates on donations.

BITS Pilani and BITSAA were looking for a unified, automated system to manage the alumni, donors, and donations management on a single platform that provides a 360-degree of all stakeholders improving efficiency with real-time updates, data security, marketing automation, efficient coordination, enhancing the digital experience of BITSAA, alumni and donors.

## The Solution

CriticalRiver built a robust, scalable donor management system leveraging Salesforce NPSP (Non-profit success pack) that comprehensively integrated the end-to-end process of fundraising activities and donor management on a single, unified platform, significantly enhancing and enriching the digital experience of all internal and external stakeholders.

## The Results

- Implementation of Salesforce NPSP integrated the entire process of fundraising and donor management effectively
- Automation of event management/email campaign with Pardot marketing automation platform ensured events tracking to occur in a single consolidated location, such as emails, invitations, social media links, and clicks culminating in sending emails to donors in a single click
- The process includes lead capture through different forms and auto conversion from lead to account, contact, and opportunity
- Collect, collage data from myriad sources, scrub, consolidate and load data in CRM simplified, providing a unified view with all relevant information in one place enabled making informed decisions
- Breaking information into silos ensured creating a shared view across fundraising, marketing programs, and leadership constituents
- Generating multiple KPI's enabled information on constituents is easily extracted in real-time by any user, such analytical reports used to take hours/days
- Multi-level approval process automation empowered different layers of management saves time significantly
- Implementation of the ranking system between the donors enabled targeting specific donors
- Integration of online payment system within the CRM enabled processing of all payments eliminated manual processing
- Consolidation of tax receipt emails to multiple donors, automation of the recurring donation, and the tax receipts to the donors saved time and enhanced digital experience
- Storage space of CRM optimized with the integration of a 3rd party tool – Collaboration Butler to upload documents directly to Google drive
- Migrated existing data into CRM provided a consolidated view of all data

## Impact Delivered

- 10,000+ reduction in man-hours annually
- 80% increase in trend prediction accuracy

## Solution Components

Salesforce NPSP, Pardot Marketing Automation, Collaboration Butler

## Benefits/Results

- End-to-end automation of donor management eliminated the entire manual process
- Real-time updates ensured tracking of day-to-day activities of end-users saving time enormously
- Key analytics information and KPI metric helped the management to make informed decisions easily
- Auto-approval and email notifications substantially improved stakeholders' engagement
- Tracking of the donation allocations under specific campaigns provided a 360-degree view, enabling decision making quick and easy
- CRM-powered data management eliminated all data loss completely
- Complete email campaigns automation management, capturing of leads, follow-ups enabled time-to-market acceleration
- The entire donation management process managed in Salesforce NPSP Cloud made the system robust and scalable
- The solution helped in building a meaningful relationship with all donors and other stakeholders