

Empowering a Non-Profit With Scalable Digital Engagement and Insight



The Customer

The customer is a non-profit 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.

The Challenge

A California-based non-profit foundation 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.

The Solution

- 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.

The Results

- The non-profit foundation 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)

Impact Delivered

- 100% Increase in managing relationships within its network
- 100% Increase in transparency between them and their partners
- 75% Increase in opportunity management and engagement

Solution Components

Salesforce Communities, Salesforce Lightning