Customizing a Salesforce Implementation to Meet a Nonprofit's Unique Needs

Client Profile

The client is a nonprofit organization dedicated to improving the lives of disadvantaged individuals and families through educational and vocational programs, job readiness, job training, case-managed client services and employment opportunities.

The client's mission is to replace hopelessness with opportunity by providing career training, stabilizing families and growing stronger communities.

Business Challenge

The client was using time-consuming manual processes to document individual donor and group contributions, government funding and grants from foundations. In addition, the client was using a stand-alone desktop accounting package to manage their finances. The application was unable to accurately record data on funding sources and potential donors. As a result, donor contributions were difficult to verify and track, leading to financial reporting errors and donor apprehension.

Business Solution

RadixBay analysts held a series of system design meetings to evaluate the nonprofit's current needs, pain points and future goals. The analysts created detailed specification documents to record the client's requirements. RadixBay's team of Salesforce certified implementation specialists used the specification documentation to configure the platform to meet the client's unique needs.

RadixBay's Salesforce team also designed several system customizations to meet the nonprofit's unique data processing, organizational workflow and internal/donor reporting requirements.

> "Our goal is to provide a level of service that goes above and beyond what the customer is expecting."
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> *Christen Sisler - Senior Director, Salesforce Practice Lead*

Benefits Delivered

- The client is able to easily manage new contribution opportunities, view donation pipelines and track fundraising activities
- The new user interface presents a unified view and searchable list of donors, grants, and donations
- The platform provides the client with the ability to manage the entire donation life cycle - from pledge to recurring payments
- The client was able to leverage the new system to kick off its first major fundraising campaign
- The customizations allow the client to perform outbound marketing campaigns
- The new system streamlines and automates numerous time-consuming manual processes

About RadixBay

From application development and packaged application support to around-the-clock cloud and on-premise data infrastructure services, RadixBay provides a wide range of enterprise-grade IT solutions. Focus on your business, let RadixBay handle your IT.