

*Smarter Fundraising
with Salesforce*

- Rachel's Story -



SalesFix



Meet Rachel, she is the Head of Fundraising at Greyhound Family, a For Purpose organisation that helps rehome ex-racing greyhounds.



Rachel has been reviewing her latest fundraising reports and has noticed that there has been a decline in donor acquisition recently and their regular donor attrition rate has increased significantly.

Rachel is worried that these two things combined mean the slight decline in the organisation's fundraising is only going to get worse. Rachel speaks to her team to see if they can pinpoint where they can improve their operations to increase donations.



Collecting the information she needs to make an informed decision on her next steps proves difficult. Her organisation has separate systems for digital fundraising, donor management, greyhound adoption, and reporting. It takes a lot of time and resources to get an idea of their current position.



She finds out that their different teams are connecting with donors at different times which can result in some donors receiving multiple emails, phone calls and appeals in a week.

Having multiple interactions across different platforms makes it difficult to paint a clear picture of each individual donor's journey, resulting in a less than ideal experience. Rachel knows that this is impacting her donors' repeat giving and the organisation's fundraising outcomes.



It is also clear to Rachel that this disconnect of information and systems brings a large administrative burden to her team and is taking away from the purpose of the organisation and the valuable work they do.

Rachel is ready to make a change to improve the outcome of her organisation. She knows that she wants to provide a better donor experience with a connected supporter journey and increase fundraising income.



To help her achieve her goals Rachel knows that the organisation requires a centralised system that can give them a complete overview of their donor's journey and reduce the administrative overhead for her team.



Rachel needs some help and she goes in search of an expert that can help her find the solution she needs. She speaks with a friend who is also a fundraising manager and she recommends that Rachel speaks to Nicole.

Nicole is a specialist in helping For Purpose organisations streamline their operations and improve their fundraising outcomes and has helped Rachel's friend increase fundraising income in her organisation.

Nicole meets with Rachel and together they review her current systems and talk about where her organisation is struggling.



Nicole and Rachel decide the best way forward is to implement a centralised platform that can bring all the data together into one spot.

Knowing that Rachel's organisation has limited technical capabilities in-house, they agree to take a low-code, modular approach to their platform by bringing together different components that are best of breed in their particular area.



For digital fundraising, they decide to go with Raisely: it's free for the organisation to use, has a great roadmap of development so they know they'll always be using a solution that keeps pace with the rapidly changing fundraising world, and is PCI compliant.

Nicole advises Rachel that Raisely's CRM won't be sufficient to support the number of donors the organisation has and she suggests Salesforce as a solution. Salesforce, Nicole says, has over 55,000 NFPs as customers around the world and has some excellent pre-built fundraising features.



By connecting Raisely to Salesforce using MoveData, Rachel's organisation can make use of best of breed solutions that do the exact job they're meant to do. Rachel realises that the solution they've come up with is also future-proof.

If Raisely changes how they do things so it no longer meets the organisation's needs, then they can simply unplug the solution, reconnect a different one and not lose anything in Salesforce.



For email marketing, the organisation has been using MailChimp for some time and the decision is made to continue using it, and to integrate it to Salesforce.

Rachel thinks changing email solutions now would be too much change to deal with, but knows that when the team is ready, she'd like to think about a marketing automation solution they could use that would give the donor a better experience, and automatically nurture them to donate more. They talk about bringing Pardot into the mix later on.



Over the coming months using their new Salesforce solution which brings all the data together, Rachel and her team are able to now create clear profiles of their donors, understand their behaviours and easily monitor their fundraising activities.

With all the information for the organisation now centralised, Rachel's team are spending less time on administrative tasks and more time working on fundraising strategies and improving the donor experience. There is better communication and collaboration and more time is spent on their cause and not administration.



Rachel is excited for the future of Greyhound Family. Fundraising revenue is increasing, donors are receiving a better experience and recurring donations are on the rise thanks to the newly implemented nurture programs.

Rachel now has the time to lead her team into diversifying their fundraising streams and more incoming fundraising ultimately helps them fulfil their purpose of helping more greyhounds.



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Is your fundraising journey similar to Rachel's?

Do you want to spend more time on improving outcomes for your organisation and less time on administration?

I would like to hear about your journey and how we can help you.

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