

Case Study:

Breakthrough New York

| Summary

Challenge

Breakthrough New York asked us for a streamlined solution that would propel their fundraising and volunteer engagement strategy.

Process

We created a database with advanced fundraising and volunteer tracking, custom algorithms and reports, and developed an innovative network visualization application.

Results

A simplified system now makes relevant data transparent, easily accessible and shareable. Real-time analytics help forecast future revenue and manage progress toward goals.

*"The innovations Yurgosky made were really vital for a small shop. We don't have a whole department dedicated to foundation or board giving. They have **helped us use technology to make up what we lacked in staff power.**"*

Rhea Wong

Executive Director, Breakthrough New York

| The Challenge

Decrease staff
administration
increase
impact

Build a system that can provide a 360-degree view of donor and volunteer data, with powerful analytics and reporting. Uncover valuable insights for deeper engagement and actionable next steps.

| The Process

Breakthrough New York is committed to getting high-potential, low-income students to four-year colleges. They provide the academic preparation, guidance and mentoring that students need to be able to attend selective four-year colleges.

With a powerful mission and an ambitious former BTNY graduate at the helm, the organization has experienced huge growth, attracting thousands of donors and millions of dollars.

Their previous systems couldn't keep pace with their rise and left the team drowning in unorganized data, making analysis and reporting a time-intensive ordeal.

It was imperative to get the data out of the old system and into the new one quickly. The team at Yurgosky worked with Breakthrough to rapidly set-up and customize Salesforce. Historical data was pulled from the old system, cleaned and uploaded.

“What has taken hours to compile is now instantaneous and in my pocket. I can access my data right before or during a meeting with a donor.”

Rhea Wong

Executive Director, Breakthrough New York

| The Process (continued)

*"The network visualization immediately gave us insight into our data that used to take days to pull out manually. **First, second and third connections are visually (and beautifully) displayed** on the contacts page, allowing our team to leverage hidden relationships to facilitate fundraising."*

Rhea Wong

Executive Director, Breakthrough New York

Breakthrough went live in the system and were **immediately able to report and analyze their data like never before.** Once they were up and running, the Yurgosky team added automated processes to free up even more staff time.

A key goal of implementing the new system was to better understand BTNY donors and leads, in order to increase donation size and reduce the time it took to convert a lead.

Through collaborative brainstorming sessions, we built creative and innovative enhancements, including **an algorithm to project the annual 'ask' Breakthrough could request from a donor** and a daily digest report that alerts the executive director of upcoming donor stewarding tasks. The flexibility of Salesforce also allowed us to create a dynamic network visualization application to show connections between donors.

"Our work with Yurgosky simplified our system to show us the most relevant information, making everything accessible and transparent," Rhea commented. "Our data is now available at our fingertips, and we can easily share it with board and staff members."

| The Results

Breakthrough now has a system that works for them, not against them.

It simply and effectively organizes their financial, donor and volunteer information, giving real time analytics on their progress towards goals and next steps to take on fundraising. Financial reporting, for board meetings or audits, now takes minutes rather than the weeks that were spent before.

Importantly, the team at Breakthrough know they have a system setup for growth, **allowing their big ideas to become reality.**

*“The work we did with Yurgosky has **given us more control over our destiny.** We can now forecast future revenue sources and identify which goals we’re meeting and which we need to work on.*

***We upgraded.** It feels like we are finally working in 2016 instead of living in the past.*

Rhea Wong

Executive Director, Breakthrough New York

| The Team



Breakthrough New York transforms the lives of talented kids from low-income backgrounds by providing educational support from middle school through college into careers and inspires talented young people to enter careers in education through our students-teaching-students model. Our goal is to create leaders who break the cycle of poverty in their families and affect positive change in their communities.



Yurgosky is the premier technology, strategy, and analytics company serving nonprofits. We work with many of the largest and most innovative nonprofits in the world to build data-focused technology to conserve more land, engage more volunteers, raise more money, and deliver more comprehensive services to communities.

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