

# Digital Transformation for Donor Relationship Management



Challenge	Solution	Result
<ul style="list-style-type: none"> <li>Legacy enterprise application lacked architecture for efficient donor relationship management</li> <li>Disconnected data management, processes, and manual systems and lack of flexibility with customization and process automation</li> <li>Limited donor engagement and retention causing a decline in donor growth goals</li> <li>Teams spending too much time entering data into spreadsheets, emails and one-off communications</li> </ul>	<ul style="list-style-type: none"> <li>Replaced legacy enterprise system with Force.com designation payouts to support full paid gifts, bill direct gifts, payroll deduction gifts, and resolution of exclusions and eligibility issues</li> <li>Automated Donor, Gift, Grant, Prospect, Volunteer, and Event Management processes</li> <li>Implemented Salesforce Nonprofit Success Pack, Community Cloud, Wave Analytics, and marketing automation</li> <li>Deployed Customer Portal enabling customers to track their cases and receive statuses via the web</li> </ul>	<ul style="list-style-type: none"> <li>Reduction in workload for critical operations, including the replacement of manual processes typically performed with paper forms/Excel and automation of donor acknowledgement letters</li> <li>Improved view of donor and prospect data in a single platform in order to better analyze data for reaching a wider audience and to convert prospects into volunteers and donors and using more mobile and social capabilities for deeper community engagement</li> <li>Tighter integration across its business units due to automated workflows for processing donations</li> </ul>

## Industry

NonProfit

## Profile

Since 1924, United Way of Metropolitan Dallas has invested in the most effective local programs that work to create opportunities and change lives forever. They unite donors and volunteers with organizations who are focused on producing real results in the areas of education, financial stability, and health.

## Company Size

300

## Location

Dallas, TX

## Products



**“Our partnership with Accenture, Salesforce and Configero is a great example of how United Way is keeping pace with the rapidly evolving digital age to actively enhance and engage our internal team, donors and volunteer base.”**

-Jennifer Sampson, President and CEO of United Way of Metropolitan Dallas

