



BREAKING DOWN SILOS, TRANSFORMING COLLABORATION



COMPANY PROFILE

Improving the quality of life for people in the local community by empowering them to live their best possible lives

CHALLENGE

Replacing legacy, antiquated donor management software with a CRM that delivers comprehensive constituent data and enables teams to collaborate and interact with external audiences

SOLUTION

A customized Salesforce instance bolstered by Pardot marketing automation that could make UWVP's dream a reality and speak United Way language

RESULTS

A robust CRM accessible from anywhere, providing a holistic view of money trails and donor contacts and yielding a dramatic increase in funds raised, enhanced constituent segmentation, and improved reporting.

DIVERSIFYING STRATEGY WITH INNOVATIVE TECHNOLOGY

United Way began in 1887 in Denver, CO, with a small group of dreamers mobilizing volunteers and funds, coordinating relief services, counseling and referring clients to cooperating agencies, and providing grants. It has since evolved into a worldwide movement, with a presence in roughly 1,800 communities and the aim of advancing the common good through education, financial stability, and health initiatives.

The United Way of the Virginia Peninsula partners with companies, governments, and nonprofits to provide programs and resources to address challenges in the Virginia Peninsula. They were grandfathered into legacy software, as United Ways have historically utilized it for donor management. Individual UWs operate within themselves, and UWVP knew that where they wanted to be in the future meant that they would have to journey away from legacy platforms and capitalize on their independence.



“I interviewed a lot of different people representing various donor management systems, CRMs, and platforms. It was Candoris and only Candoris who said that they could build out what was needed, our ‘pie in the sky.’”

Andar Software was a good tool for the finance side of the house, but it provided a lot of data that wasn’t necessarily accurate, up-to-date, or comprehensive. UWVP leadership desired to adopt a customer relationship management (CRM) solution like Salesforce in an effort to revamp resource development, diversify funding streams, enhance community impact, and possess readily-accessible data. The daunting task of identifying a solution and an implementation partner that would navigate the way to the dream was bestowed to Hargette. The needs were easily identified:

- Obtaining a CRM solution that would provide an organic view of donors and environments to enable segmentation and foster enhanced community outreach
- Building dynamic reports with good data
- Doing away with siloed departments and pivoting to function cross-departmentally.

FACILITATING MASTERPIECE CAMPAIGNS WITH EASE

Workplace campaigns are a huge part of what the United Way does, and each United Way is unique in how they carry them out and understand their donors. Candoris customized UWVP’s Salesforce instance to meet their needs of collaboration, accessibility, and deep campaign data understanding.

It was effective from the first campaign; the nonprofit achieved a 37% increase in fundraising, with an additional \$1.5 million raised. Furthermore, they utilized their new understanding of donors and community needs to create two new affinity groups, Women United and Emerging Leaders, to help engage and mobilize the community. UWVP is consistently experiencing fantastic results that inspire and energize the entire team.



Leadership is now empowered with true and accessible data that will perpetually live in a dynamic resource. Courtney Dowd, Director of Finance & Benefits, is most excited about the transparency that Salesforce afforded them.

“I build reports in Salesforce to show me where fiscal issues lie. This has raised awareness of a large amount of funds that were missing... \$40,000 was owed to us that we didn’t receive from third party processors for one reason or another. We’re now able to work as a team with full transparency, fully understanding and knowing where all of our money is coming from. Salesforce has been able to adapt to our United Way and speak our language, which is huge.”

The direction of giving is trending towards individual giving, and Salesforce allows UWVP to flex and to capture relationships and affiliations, building campaigns up and down as needed. Layering Pardot on top of it added an entire new dimension to interacting with donors. The dramatic value adds of saved time and energy made a world of difference for staff, who now have time to do what they do best: connect resources to those who need them most.

“Resource development, community impact, and finance are always siloed for United Ways... except for us. We as an organization have gone through a massive change. Everything is lining up, and there’s no other platform right now that is doing this. You can’t do anything if you don’t have relationships with people, and that’s what Salesforce allows,” says Hargette. “From the first time I contacted Candoris, and throughout the process of data gathering and implementation, they have gone above and beyond. I have been extremely impressed with their ability to take what they hear and transfer that into Salesforce... or build us what we need.”



Candoris is a digital transformation pathfinder, helping future-ready organizations supercharge productivity, modernize their infrastructure, and elevate their security. To learn more about how Candoris can help you make the most of CRM and software investment and innovation, contact us at salesforce@candoris.com

