

Chinese for Affirmative Action

A nonprofit had its data stuck in a legacy database, and wanted to move into the future by moving that data into Salesforce. It would take a data migration expert to extract that data, and a previous consultant's migration attempt had failed.

The Partnership

Chinese for Affirmative Action (CAA) is a nonprofit based in San Francisco's historic Chinatown that seeks to advance the civil and political rights of Chinese Americans. They are also an umbrella organization for nine groups that form Asian Americans for Civil Rights Equality (AACRE), each with their own data and program needs, which are housed in the same Salesforce instance. Dayspring first partnered with CAA in 2015 to implement Salesforce for their fundraising, marketing, and advocacy efforts. Since then, Dayspring has continued to provide ongoing consulting support over the years, providing periodic enhancements and improvements.

The Challenge

CAA needed to migrate their fundraising and program database to Salesforce from their two legacy databases, Sage and Salsa. With more than a million records generated over 40-plus years, this was not a task for the faint of heart. In addition, CAA needed to structure access to Salesforce so that each of the remote member organizations of AACRE had access to only their own specific donors and donation history.

The Project

The task for Dayspring's Salesforce consulting services was clear: configure Salesforce with the Nonprofit Success



Pack for CAA's needs, do a little security matrix magic, and then, oh yes, the data...

CAA's old database was convoluted, their data export nearly indecipherable by a maze of unlabeled tables and distantly connected objects. Dayspring's data experts did a deep dive into that treacherous terrain, capturing IDs, deciphering names, connecting tables, and combining objects. In the end, we succeeded in extracting all of CAA's data in a clean, well-structured, appropriately linked format that was just begging to be imported into the pleasant pastures of Salesforce.

Meanwhile in Salesforce, Dayspring's Salesforce consultants had configured the Nonprofit Success Pack and defined record access. Soapbox Mailer replaced Salsa for email marketing. EventBrite for Salesforce replaced Google Spreadsheets for event management. Salsa Sync brought constituents' advocacy actions into Salesforce.

The result? With Salesforce, CAA has a modern, unified, cloud-based, relational database which allows it to raise money more effectively and to advance its mission to protect the civil rights of Asian Americans.

Technologies

Eventbrite for Salesforce, Report Builder, Salesforce App Exchange, Salesforce Nonprofit Success Pack, Salesforce Sales Cloud, Salsa Sync for Salesforce, Soapbox Mailer, SQL, Web-to-Lead

“Dayspring came highly recommended to us from another group of consultants. They were highly professional and communicative from the start. We worked with a team of 3 on their staff and felt very confident regarding their expertise, excellent project management, and quick response to problem-solving. They were attentive to our limitations as a nonprofit and non-tech people (some of us). Any changes to the project scope were discussed quickly upfront and resolved to our satisfaction. We would work again with them.”

Susan Hsieh

Fund Development Manager, Chinese for Affirmative Action

“Chinese for Affirmative Action has been a valued client of Dayspring since 2015. Their ground-level community work is backed by a staff that is sharp, focused, and passionate. Their projects are inspiring, and they are a pleasure to work with.”

Jeff Chung

Salesforce Consultant, Dayspring Partners