

Enneagram Prison Project

Experiencing the freedom a great Salesforce database brings.

Client

There are nearly 2.5 million people currently incarcerated in the US. Prisoners serve their sentences, but there is too little rehabilitation. The Enneagram Prison Project (EPP) seeks to change that here in the US, but also around the world by increasing self-awareness, self-regulation, and self-compassion through use of the Enneagram. EPP had a compelling vision, but needed an excellent Salesforce database to increase their fundraising and manage their volunteers and Enneagram guides. Dayspring became their Salesforce guide, providing a different kind of discovery and implementation.

Situation

EPP had a poorly configured Salesforce instance that wasn't working for them, leading to poor adoption and usage as staff turned to spreadsheets in frustration. But as they were expanding their organization it became clear that they needed a well configured Salesforce instance that would allow them to increase fundraising efficiency. Their payment processor was not integrated with Salesforce and their email marketing contacts did not sync with Salesforce, making communication difficult. Managing their volunteers and guides was becoming more time consuming without a unified system to receive applications, evaluate applicants, initiate approval processes and to track their volunteers



and guides. They needed expert Salesforce help and turned to Dayspring Partners to lead the way.

Implementation

Dayspring began with an initial assessment of the existing Salesforce instance, noting configuration that was not best practice, enabled newly developed Nonprofit Success Pack (NPSP) features, and configured the NPSP fundraising functionality for EPP's development needs. These changes required some data transformation and cleanup to make everything work correctly. Their contact list from their email marketing solution was migrated to Salesforce to create a unified system for their fundraising and marketing constituents. Dayspring configured Click & Pledge as an integrated payment processor and Campaign Monitor as an integrated email marketing solution.

Additionally, EPP wanted to ensure they had the right touchpoints with donors at the right time. An important piece of this was to make sure they were not behind in reaching out to any of their constituents. To that end, Dayspring set out Lightning for Outlook so they could log activities, and see those activities alongside all of the other related Salesforce records. Apsona Document Merge was also configured to provide tax receipt letters and acknowledge donors more quickly.

On the Volunteer/Guide end, Dayspring used FormAssembly to create application forms that submit to Salesforce, and Salesforce approval processes to allow prospective guides to be vetted and approved in the CRM. EPP's guides and volunteers can now be identified by region, skills, and application status with EPP. And because EPP works in different countries around the world, permissions were set up to ensure that by location, staff would have access to only the data that was relevant for them.

Finally, Dayspring provided training to EPP's staff and led their adoption process, ensuring they were taking full advantage of their new functionality. Dayspring provided ongoing support to EPP in their first few months to help them utilize all their new system offered. And Dayspring continues to partner with EPP into the future as they grow, expand and continue their good work.

EPP now has a well configured Salesforce database for their fundraising. Fundraising campaigns such as Giving Tuesday are much more productive and painless this past year. In addition they are more able to track their volunteers and guides, positioning them to expand their programs to more prisons and into additional countries.