



ORGIQ
QUICKSTART DASHBOARDS

Your Mission, Transformed Into Efficiencies and Opportunities



3Circle's ORGIQ QuickStart Dashboards harness the power of Salesforce technology and innovation to support nonprofits by providing access to data, knowledge and connections, ensuring everyone is working together, for the common good.

Technology With So Much Impact:

- Technology to power your entire mission
- Designed specifically for nonprofit organizations
- Integrates siloed departmental data
- Eliminates inefficiencies and redundancies
- Fast implementation and launch
- Manage cases, campaigns and fundraising
- Track people and projects in real time
- Seamless, cross-functional collaboration
- Built on the powerful Salesforce platform
- Receive up to 10 FREE Salesforce subscriptions*

**For qualifying 501(c)3 nonprofit organizations.*



Data
People
Technology

**3Circle
Solutions**

ORGIQ QuickStart Dashboards: Measure Impact Instantly

The ORGIQ Dashboards are tailored to nonprofits, helping you connect with constituents, run more efficiently, and measure your impact in real-time.



ORGIQ QuickStart Dashboards for Case Management

Client Onboarding: Review applications/potential clients for onboarding, making sure all data and documents are completed.

Client Services: Track services provided by your organization and external agencies to clients, as well as their effectiveness.

Oversee Program Participation: Monitor which clients are participating in classes and training sessions, monitoring their compliance, and track who is providing the programs to your organization.

Manage Caseload: Enable your staff to manage cases and track goals, milestones and action items all in one place, so they are spending more time with clients and less time on paperwork.

Full Outcome Reporting: Report on metrics like client demographics; services provided, use, and value; completion rates; trends in services offered; referral sources; and more.

ORGIQ QuickStart Dashboards for Donor Management

Managing Constituents: Get a birds-eye view of current donors and opportunities in the pipeline for improved donor retention.

Manage Volunteers: Identify specific needs for volunteers, track who provided those needs and identify money saved on hours worked.

Identify Opportunities: Track all donation, sponsorship and grant opportunities, and where they are in the pipeline, including cash, in kind or soft credits.

Monitor Campaigns: Evaluate the effectiveness of special events such as training, classes, conferences and board member participation to get a true picture of return on investment.

Report Revenue: Track all revenue and where it derived in one place, and report findings to your board, agencies and constituents.



3Circle Solutions, The Authority On People, Processes and Technology Solutions

Our team understands the unique needs of nonprofits, and we have years of experience to advance and modernize your mission. 3Circle's ORGIQ QuickStart Dashboards allow your organization to streamline processes and workflows, reduce paperwork with cloud-based documentation, deliver more timely and effective services and enhance staff productivity, giving you a 360-degree view of organizational growth and development activities.

Why Salesforce.org? The world's most powerful data management tool is not just for the business world; in fact, more than 40,000 nonprofits across the globe use Salesforce to advance their missions. Salesforce.org is the social impact center of Salesforce, enabling and empowering nonprofits to achieve and surpass critical goals. They do this by providing up to 10 FREE subscriptions to a qualifying nonprofit organization for life! Using this platform, we work with nonprofits to optimize their data and come up with solutions that address their specific needs, so they can focus on the important work they do in their communities and not waste time and resources on inefficient systems.

Contact us today for more information about ORGIQ, the powerful and affordable QuickStart Dashboards. (337) 347-7291 / 3Circle.Solutions



**SALESFORCE
RESCUE**

If you're currently using Salesforce but you're not getting the most out of it, 3Circle Solutions can help. We'll assess your data and needs and get you back on track with Salesforce.

**3Circle
Solutions**