

# Canadian Cancer Society (CCS)



Canadian  
Cancer  
Society

Société  
canadienne  
du cancer

The Canadian Cancer Society is a national, community-based organization of staff and volunteers whose mission is the eradication of cancer and the enhancement of the quality of life of people living with cancer.

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Heller Consulting is large enough to bring in-house skills to the table and also small enough that our organization received white glove attention for our complex project.

**Andrew Caswell**

National CRM Implementation Lead, Canadian Cancer Society

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## CHALLENGE CONSOLIDATING SYSTEMS AND DATA FROM MULTIPLE ORGANIZATIONS INTO ONE CRM PLATFORM

CCS was a de-centralized organization spanning 10 provinces. Each location operated separately, with their own databases and data sets.

When the organization restructured to operate on a nationwide basis, they needed to consolidate all of their data and systems. They decided to move to Salesforce Nonprofit Success Pack as their customer relationship management (CRM) platform and needed a partner to help:

- Implement the new platform in a bilingual (English and French) environment as part of the complex reorganization.
- Develop a common data model and new nationwide business processes in fundraising and volunteer engagement for the entire organization.
- Implement and integrate additional applications and solutions for business processes, including data collection and cleansing, document merging, public facing peer-to-peer fundraising, e-commerce, gift processing, and Canadian tax receipting.
- Prepare the newly consolidated staff for the technology changes.

- Train and enable staff to use the new technology and business processes

To add to the project's complexity, CCS merged with two other nonprofit organizations during the span of the project and faced a reduction in staff and revenue due to the COVID-19 pandemic.

### The Heller team built a custom solution for CCS that includes:

- **Salesforce Nonprofit Success Pack** as their core CRM platform
- A **custom-designed, purpose-built gift processing and reconciliation** solution
- **DemandTools** for data cleansing and hygiene
- **DocGen** for mail merging
- **Jitterbit** for system integration
- **ImpactLearn for in-platform learning**
- **FormAssembly** for data collection
- **Change management** readiness assessment, plan, and coaching and support
- **Custom training** content

# SOLUTION CUSTOMIZED SOLUTION WITH WHITE GLOVE SERVICE

The Heller team worked closely with CCS to build a custom technology solution that meets their needs, while operating within their complex restructuring initiative. The solution included:

- Consolidation of multiple systems and data sets – The Heller team worked with CCS to implement the Salesforce platform and multiple applications to support CCS’s new, consolidated business processes. The teams also developed a common data model for the organization and moved CCS’s multiple data sets into the model in the Salesforce CRM system, with a combined 20 million contacts and related engagement history.
- For the first time, CCS’s nationwide staff now works on a single platform with one set of data, allowing them to collaborate closely on managing relationships with donors, volunteers, and other constituents, as well as access consolidated metrics from the new, single source of data. The entire solution was designed so CCS can easily make changes as the organization’s strategies and processes evolve.
- Collaborative project management – The teams worked together with a tailored project management approach that included regular communication; a Heller-facilitated decision-making model; and multiple iterations of planning, prototyping, testing, refining, and approvals to ensure the project stayed on track. The highly effective 30+ member CCS/Heller project team operated as a single team with a clear focus that delivered on time and on budget.
- Change management – To pave the way for smooth technology and process changes, the Heller team worked with CCS executive and project sponsors and leads to develop a vision and identify the critical success factors that would lead to achieving that vision. Together, the teams defined minimum viable product for the system

launch. The Heller team developed change management recommendations and priorities, and the CCS sponsors took ownership and responsibility for delivering on the plan.

- CCS worked with a core group of business stakeholders and a change management committee to ensure strong and effective communication. This included engaging leaders to prepare for the change. Goals for the new CRM were incorporated into performance planning and the organization prioritized a comprehensive learning and enablement approach focused on adoption.
- Online training with bilingual “micro-learning” – Partly in reaction to the COVID-19 pandemic, and partly due to change management work, the Heller and CCS teams pivoted their approach to user training. Instead of facilitating in-person “train the trainer” sessions, followed by a month-long roll-out to users, the Heller team worked with CCS to move to a new model for learning and enablement.

The team developed a comprehensive learning plan tailored by user audience and launched with an in-platform Learning Management System. The training features multiple audience-specific learning pathways with more than 100 courses and 600+ micro-learning lessons that include short videos and quick reference guides in English and French.

This approach allowed users to complete minimum essential training before the project launch, and then continue with more advanced and specialized training after the launch. The in-platform micro-learning approach also allows users to search for and reference lessons any time they need a refresher. It also allows content authors to quickly and easily update specific learning units when CCS makes changes to their technology. As the CCS team onboards their second wave of users, they are able to repurpose this training into new learning pathways and use it to onboard new team members.

## ABOUT HELLER CONSULTING

Since 1996, Heller Consulting has focused on helping nonprofits help others by developing and implementing technology strategies. We provide solutions that enable nonprofits to spend more of their time working with people, not their IT platforms.

After working with more than 1,000 nonprofits, one thing hasn’t changed: our passion for helping clients use the right technology strategies and systems to significantly expand the impact of their missions. Our team of experts love to help organizations find a better way of using technology to manage fundraising, donations, volunteer activities, program services, and outreach.



[Teamheller.com](https://www.teamheller.com)  
[info@teamheller.com](mailto:info@teamheller.com)  
510-841-4222