

Case Study:

Second Harvest of Silicon Valley



“Working with Heller to define our Salesforce roadmap made it clear to the organization that we needed to change how we were thinking about our constituent data. The roadmap process provided clarity about the problems and limitations we were up against, and the team helped clearly define the steps we needed to take to reach our end goal. Heller also provided a framework we used to talk to our executive team about the changes needed, and this was critical in getting their buy-in and support for the project.”

Elizabeth Whamond
Director, Information Technology
Second Harvest of Silicon Valley

Founded in 1974, Second Harvest of Silicon Valley is one of the largest food banks in the nation. It provides food to more than a quarter of a million people in Santa Clara and San Mateo counties every month. Like most food banks, Second Harvest works with a variety of constituents, including clients, volunteers, and donors.

The Challenge

The work it takes to fulfill the mission of ending local hunger typically involves a great deal of complex logistical management, and because of this Second Harvest had tweaked tools over the years to keep everything running smoothly. However, the strategic picture was unclear and customizations were inconsistent from department to department.

We were brought in to assess the technology environment and make recommendations for areas they could consolidate and break down departmental silos that had grown unwieldy over time.

The Solution

Our team reviewed an extensive set of sample reports, spreadsheets, and business process documentation provided by our client before meeting with members of departments from across the organization.

During a three day onsite, we discussed what was working and what wasn't. We talked with representatives from across the organization, including Volunteer Services, Development, Finance, Programs & Services, Marketing, Food

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Sourcing, and Community Engagement. With the information they shared, we wrote over 200 detailed user stories that articulated what was needed for people to do their jobs more effectively. These served as functional requirements for new solutions and became the basis of user testing in the future.

From there, we identified six fundamental requirements of a new centralized CRM system and led an in-depth comparison of platform offerings.

The Results

The CRM Roadmap became a key piece of the business case that Second Harvest made to their board to secure the budget and leadership support needed to begin implementing the plan. The process of developing the roadmap created momentum for staff members across the organization who were able to see new opportunities to improve the way they work.

With business processes clearly laid out and addressed, we then worked with Second Harvest to implement Salesforce and customize a technology environment that suited the specific needs of its staff and constituents. This architecture, with Salesforce at the center, reduced the total number of systems overall and centralized all core constituent management functions into one system.

Heller Consulting

We're committed to helping nonprofits make the most of their technology.

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

After working with over 1,000 nonprofits around the country, one thing hasn't changed — our passion for helping clients utilize the right technology strategies and systems to significantly expand the impact of their vital missions. Our team of experienced nonprofit solutions experts love to help organizations find a better way of using technology to manage fundraising activities, donations, volunteer activities, program services, and outreach.

We take the time and make the effort to fully engage all stakeholders in the development and implementation of CRM planning strategies and we believe it's just as important to carefully consider the system users as well as the constituents benefiting from it.

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