

Case Study

A higher level of management thanks to the implementation of Salesforce.



● britenet



Humanites Institute is a non-profit organization that supports the development of society and social capital and its transformation in the face of global trends, in particular the effects of the Technological Revolution. The best known programs are Two hours for family, APLO and Business Leadership Conferences.

The project for Humanites organization consisted in the implementation of Salesforce platform for the employees. In case of non-profit organizations, Salesforce allows to obtain 10 free user licenses for the platform in Enterprise version.

Salesforce for NGO

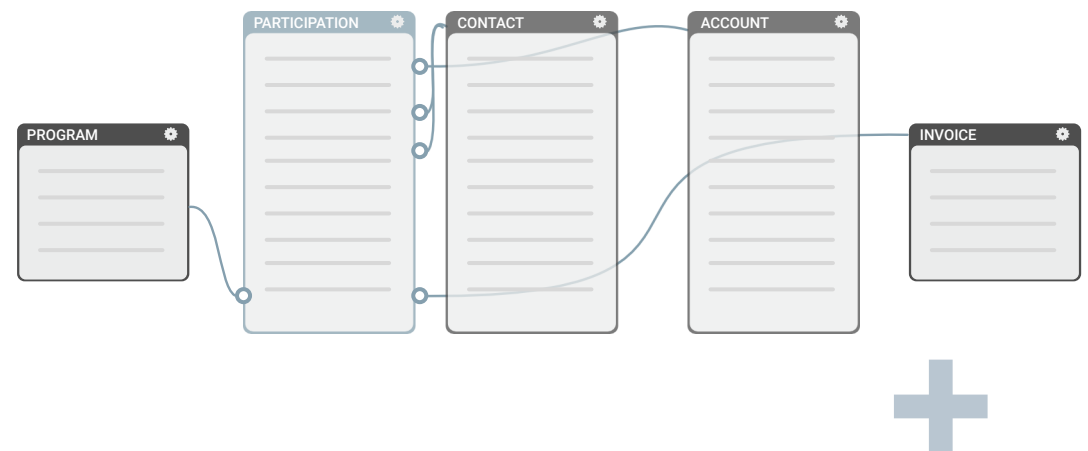
The first part of the work to be done is to go through the verification process to get free licenses. Salesforce in this case is very restrictive and therefore this stage required high accuracy and precision. The necessary documents had to be presented, i.e. entry in the National Court Register, declaration of non-profit organization status and going through a detailed survey to verify the validity of the organization.

Analysis of challenges

The client has so far conducted the whole structure of operation based on Excel sheets, in which data was often incomplete and dispersed in many places. Our task was to create a unified structure in the Salesforce system and provide an appropriate tool to import existing data. In addition, the client was looking for a tool to easily create electronic messages and send them in an automated way to a selected group of recipients.

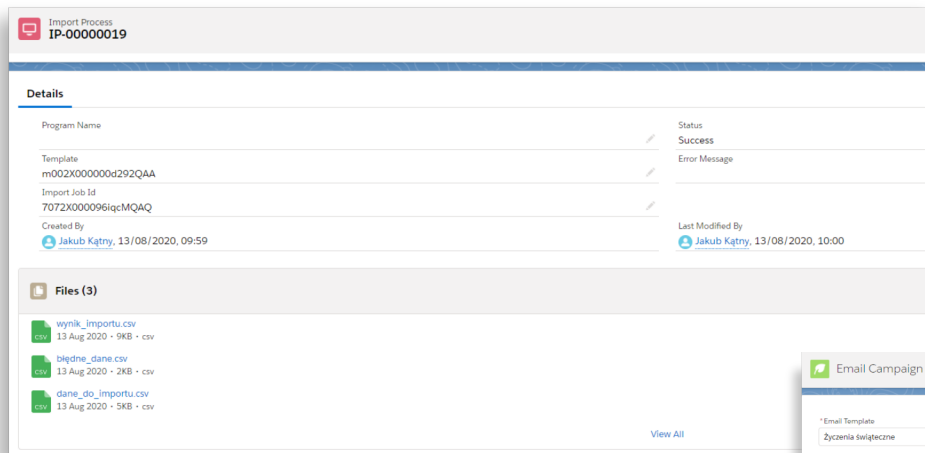
Coherent database

The first challenge was to combine distributed files with data into one coherent structure in the database system. For this purpose, we created a database model to support the structure in which the organization operates:



Easy data import

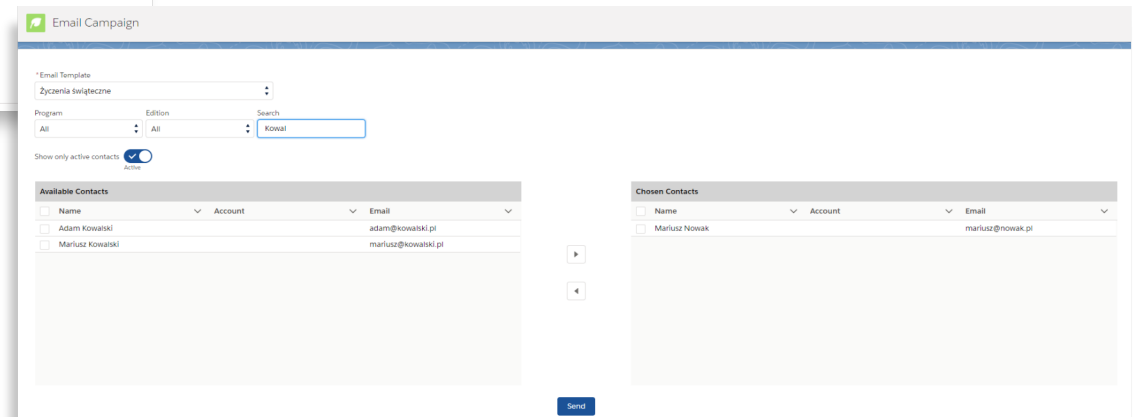
The next important point was to create a tool that would make it easy to import data from other sources into the newly existing database. The idea of the importer that was built was to minimize work on the user side. The solution consisted in choosing the right program for the user and loading the csv file. Finally, the user was provided with information about the result of the import process, which contained all the necessary information related to the import operation, it constituted also the history of the operation.



The project team developed a solution operating on the Salesforce platform with an additional Nonprofit Success Pack installed. Thanks to this solution, the client was able to import his own databases into one common database, integrate with solutions created in WordPress and view financial data of the organization.

Automated email handling

The next task was to create a tool for mass mailing to the appropriate group of recipients. For this purpose, a component supporting the creation of a list of recipients through a search engine configured for Humanites was developed. Additionally, the component used email templates, created through a standard Salesforce tool - Lightning Email Template. It should be noted that this solution has significantly improved the work consisting in managing e-mail campaigns for particular groups of users participating in Humanites programs.



Results

1. A full database model has been prepared in CRM, which contains all the necessary historical data needed by the customer. Moreover, it is scalable, which will facilitate its operation in the future. This has resulted in the ability to generate all kinds of reports for project managers and customer management, which significantly reduces the workload of individual employees.
2. Additionally, the client has gained the possibility to use a very advanced platform for all his employees, which was properly configured by the project team according to the presented requirements.
3. Moreover, through the integration with the client's online store, the possibility of current monitoring of finances for incoming orders appeared.
4. According to the client's needs, a component was also created to automate sending personalized e-mails to a dedicated group of recipients.
5. The result of the project is therefore a significant acceleration of users' work. Thanks to the developed tools they are able to perform their previous duties in a much more pleasant form and in a relatively shorter time.
6. Additionally, the database has a permanent structure stored in the cloud. This is a decisive step forward in terms of security and form of information storage in the organization. As a result of the implementation of Salesforce in the organization, the client has taken the data management of his customers, projects, programs and finances to a higher level.





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