

CASE STUDY

The Oklahoma Medical Research Foundation

Developing donors to fight disease:
funding critical research with Salesforce
Nonprofit Cloud

Goals

Leverage best-in-class technology to enhance and expand development and fundraising efforts.

The Oklahoma Medical Research Foundation (OMRF) was founded in 1946 with the mission of conducting biomedical research that would help people live longer, healthier lives. Since then, OMRF's scientists have conducted research leading to breakthroughs in the treatment of Alzheimer's disease, autoimmune diseases, HIV/AIDS, cancer, multiple sclerosis, and many other diseases and conditions.

OMRF needed to implement effective constituent relationship and engagement solutions to permit a holistic view of donors, prospective donors, and development and fundraising activities, enable accessible reporting on valuable metrics, and lessen the administrative burden on development staff.



The implementation of Salesforce NPSP and Pardot has moved OMRF forward to the present and prepared us for the future, so that we are more competitive for scarce donation dollars. This important step has enabled OMRF to improve our communications with long-time and new supporters and donors.

Brent Keck

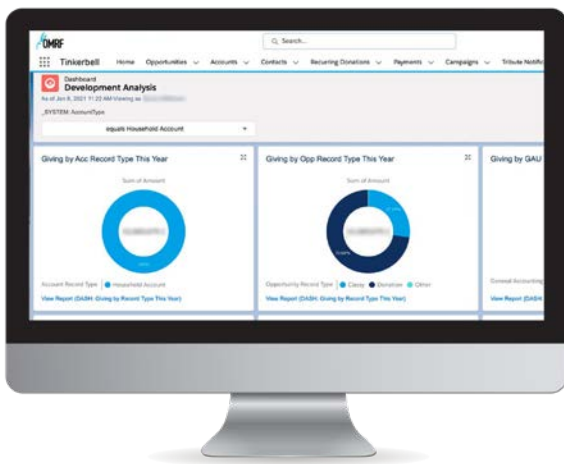
*Associate Vice President and
Chief Information Officer*

Oklahoma Medical Research Foundation

Challenges

Outdated legacy systems were difficult to use effectively or efficiently.

- OMRF's legacy CRM / fundraising tools did not integrate well with each other or with other external systems, requiring development officers to spend valuable time on manual processes instead of in the field.
- The legacy CRM was on a two-year update cycle, limiting needed improvements and enhancements.
- Reports were not easily accessible to or modifiable by development staff.
- External communications were not reaching the right prospective donors, list segmentation was minimal, and external communications efforts were not integrated with the core CRM.



Customized Salesforce dashboards give the Development team instant insight into fundraising metrics.

Solutions and Results

Streamlined, integrated donor and fundraising management and engagement tools.

Actionable Insight

OMRF's development officers can rely on the easily-obtainable, complete data in Salesforce to inform efforts and maximize opportunities with current and prospective donors, from the office or from the road.

Ease of Reporting

Salesforce NPSP's comprehensive reporting functionality makes it easier for OMRF staff to run required reporting.

Personalized Communication

OMRF can now build compelling, scalable, targeted engagement campaigns using the suite of powerful functionality in Pardot, and all engagement activities automatically sync with contact records in core Salesforce NPSP.

Transition Support

Fionta's customized training empowers OMRF development officers and staff to "self-serve" when it comes to creating custom reports, pulling segmented lists, and more.

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