

The Pink Agenda

The Pink Agenda is committed to raising money for breast cancer research and care, as well as awareness of the disease, among young professionals. Born of the belief that engaging today's generation can go a long way toward finding tomorrow's cure, The Pink Agenda finds, funds, and partners with people and programs that are improving the lives of those suffering from breast cancer and conducting the ground-breaking research necessary to improve their odds.

The Pink Agenda uses Salesforce NPSP as its main CRM database for donation management, and donor record-keeping.

Solution

The Pink Agenda addressed their challenges by deploying the Omatic Cloud Data Manager. They observed that Omatic had deep understanding of both the Salesforce platform and the data management needs of the nonprofit sector.

The Challenge

- Donations come into The Pink Agenda from several different platforms, with various data formats and data standards, that all require import into Salesforce to ensure the system is both up-to-date and the data is then accurate. Platforms could include online giving, peer to peer, social media fundraising and many other types.

In the past data integration was handled using native import tools, which were tedious to use, and did not effectively support custom data elements.

The Result

- ✓ Omatic Cloud supports integration of source data into custom fields so that donor and gift-source tracking meets the organization's analysis and reporting needs.

Omatic Cloud Data Manager has furnished The Pink Agenda with a consistent integration hub – a common-ingestion point for data (regardless of source) and common data mapping and data processing tool set to support consistent data-related business flows.

- It was very time-consuming to manipulate the broad assortment of disparate external data for importing into Salesforce – which required multiple passes to import different types of data – and the manual nature of the process resulted in data errors. Salesforce imports would typically take a full day each month and two full days monthly when donation activity was at its highest.

- ✓ Using Omatic Cloud has reduced The Pink Agenda's time spent on donor and gift data integration by at least 50%! During the busiest season this will save more than two full days per month. Omatic integration has also improved the overall quality of The Pink Agenda's Salesforce data while simultaneously saving significant time by eliminating previously required manual remediation tasks.



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The Challenge

- The standard import processes used on various data sets frequently resulted in a high number of duplicate and triplicate records in Salesforce. In addition, The Pink Agenda required certain custom data elements for source-tracking, and it was both challenging and burdensome to import data and properly relate it to custom fields.

- The Pink Agenda's internal team is necessarily lean and simply didn't have the time that their integration processes required of them. Multiple passes were necessary to import different types of data, and error remediation took even more time away from the team. With limited time and resources, and along with the need to address other operational priorities, the team was frustrated with data and process challenges.

- The challenges faced by the internal team prevented opportunities to explore maximizing the capabilities of the database beyond financial record-keeping. Not only was time spent that was needed elsewhere, but delays in data processing caused delays in implementing database-centric projects that would help The Pink Agenda team develop better outreach campaigns and improve donor relations overall.

The Result

- ✓ Omatic Cloud's sophisticated data-matching algorithms have **significantly reduced duplicate donor records**, and API-based automations have improved the process by which custom data elements are imported for donor and gift source tracking.

- ✓ With the time required to integrate donation data now cut in half, the staff is able to process gifts more frequently. Salesforce is always up to date, and **The Pink Agenda has also improved the speed and accuracy of reconciliation between the fundraising and accounting systems.**

This means The Pink Agenda team can communicate with their donors in a much more timely manner.

- ✓ The Pink Agenda team will now have more time to deploy new uses for Salesforce beyond recording and reporting on donation data – such as tracking event attendance, digital interactions, and grant disbursements. **The Pink Agenda's analysis indicates these new initiatives will not only improve their technology ROI, but will enhance donor communication and engagement, improve the constituent experience overall, and yield increased revenue and donor retention.**

Conclusion

The Pink Agenda team feels more productive on several different levels thanks to their deployment of Omatic Cloud. They are also forward-thinking and see how Omatic Cloud would be able to grow with them as they plan to use Salesforce beyond its primary donor and gift management functions. For example, they now see how Omatic Cloud could be used down the road for integrating event and program data, prospect records, and interactions beyond those related to fundraising.