American Lung Association

Founded in 1905, the American Lung Association (ALA) is the leading organization working to save lives by improving lung health and preventing lung disease through education, advocacy, and research. Donations to ALA fund medical research, new treatments, screenings, lung health education, and more.

ALA uses Salesforce NPSP as one of its main CRM systems, Salesforce Marketing Cloud for email marketing, and Blackbaud Luminate Online for digital engagement including event registrations, online giving, and email interest groups.

Solution

ALA addressed their challenges by deploying Luminate Online Integration for Salesforce, powered by Omatic Cloud. The CRM Systems team members were pleased by Omatic Cloud's truly configurable solution, on top of Omatic's longstanding expertise in the data integration needs of large nonprofit organizations.

ALA is sending more personalized email series – leading to a better constituent experience overall, resulting in more effective fundraising and more dollars raised long term.

The Challenge

- ALA's CRM Systems team struggled with effectively integrating data between Luminate Online and Salesforce. The integration tool they used was limited – team members did not have direct access to the utility and could not make adjustments – any mapping changes or process modifications had to be made by the developer.

- On top of the working with a severely limited integration tool, the pace of the data flow process was unreasonably prolonged – it simply took too much time. The ALA team was not getting the desired continuous flow of data between Luminate Online and Salesforce needed to ensure the most current information for end-users.

The Result

- ✓ As a tool set, Omatic Cloud has given ALA the ability to be tremendously agile; they can make necessary adjustments on their own, and more quickly and easily. The CRM Systems team has found their ability to log in, make refinements, remap, and reconfigure 'on the fly' to be extremely productive, rather than waiting several days for an external developer to make any required changes, for example, to data mapping or record matching criteria.

- ✓ Omatic Cloud supports real-time data flow, which has engendered more expedient outbound communications as well as analysis/reporting, especially important for the Marketing team. The continuous data flow now triggers Salesforce Marketing Cloud email strategies in minutes or hours rather than days.

  This time-saving results in the ability to be more agile and intentional, which in turn leads to better digital marketing overall – a key part of ALA's overall fundraising effort.

The Challenge

- The most frustrating challenge, however, was the overall lack of visibility into the exchange of data itself. There was no way for the ALA CRM Systems team to see, much less monitor and control, the data as it went from Luminate Online to Salesforce. This problem resulted in inaccurate, erroneous information, flowing from one system to the other.

- The result was that inaccurate data was being used by end-users which impaired the overall constituent experience that ALA was trying to build upon and improve.

  These outcomes created friction with the Marketing team, who relied on the CRM Systems team for quality data. 'We looked stupid in front of the Marketing team,' recalled the senior IT manager.

- The additional cost of having to work with an external vendor to address and resolve each and every integration issue 'added insult to injury' when piled on top of the amount of time that the integration process took.

The Result

- ✓ The senior IT manager stated that his team now has 'instant visibility' into the data that's being exchanged between Luminate Online and Salesforce. This virtually eliminates duplicate record creation and other inaccuracies, but also alerts the team to make configuration adjustments when needed.

  And an unexpected bonus is that Omatic Cloud has helped ALA to identify – and correct – flaws in how Salesforce was originally designed and configured. The Omatic solution has also put a lens on the need to enforce the Salesforce data structure to ensure the integrity of incoming data.

- ✓ With Omatic Cloud supporting overall data quality and healthy data integration, the Marketing team is now confidently able to implement new / additional constituent journeys with previously unengaged donors. This would have not even been possible before Omatic Cloud – which has greatly improved both data quality and the speed at which ALA information is being integrated between systems.

  And the agility of the platform has greatly improved the CRM Systems teams' working relationship with Marketing. The Marketing team appreciates that agility, and their confidence in the data better informs their comprehensive campaign strategy.

- ✓ ALA is sending more personalized email series – leading to a better constituent experience overall, resulting in more effective fundraising and more dollars raised long term.

  But in the near term, ALA is saving considerable money on services no longer needed from the former vendor – all that work can now easily be done in-house leveraging standard Omatic Cloud functionality.

Conclusion

Once the CRM Systems team finalized Omatic Cloud configuration and business rules, they found the solution to be completely turnkey – without the need to monitor processing or worry about exceptions, but with the right level of visibility into the actual exchange of data. 'You have to love a system that you don't have to babysit,' stated the senior IT manager.