

Crafting a Bespoke Donation Management Solution for Ireland's Leading Homelessness Charity

Our experts implemented a custom-built Salesforce solution for Ireland's Leading Homelessness Charity. This bespoke donation management solution was designed to streamline their donation management process, provide greater visibility over their internal processes, increase efficiencies, improve admin user experience, and provide better donor care overall.

The engagement began in March 2022 and was completed in July 2022. Find out more about this project below.

About the The Customer

Founded many decades ago, this leading homelessness charity has strong values around social justice, respect, inclusion, and participation. What began as a soup run and meeting point for the homeless community in Ireland, soon grew into the large-scale organisation that operates today, with thousands of donors who share the charity's values and mission.

The charity has consistently worked to tackle homelessness, providing crucial aid via its health team, mental health, and drug support facility, as well as its employment and training service. The charity not only works directly with homeless people, but also works to educate the wider community about the complex issue of homelessness, with a goal to eradicate homelessness entirely.



The Challenge

Our customer was previously using Blackbaud's Raiser's Edge to manage their payment system and store all donor details and fundraising contacts, but this outdated platform was no longer serving their needs, as the organisation continued to grow and expand. Their

complicated, manual direct debit payments process and monthly credit card payment process needed to be replaced with a solution that would reconcile all payments automatically and increase efficiencies.

Alongside this, the charity was also working with an outdated reporting function that was difficult for internal teams to use; their data model was excessively complex, with multiple workarounds and makeshift solutions that each had their own limitations. This data structure on the old system was outdated; the charity's fundraising department had grown its fundraising function so much in the 19 years since it had first got Raisers Edge, that it was difficult for the charity to get an overview of their donors and volunteers. The charity was in need of a bespoke donation management solution that would bring everything together and modernise their organisation, facilitating further expansion and increased support.

The Solution

The leading Irish homelessness charity engaged Bluewave to create a bespoke donation management solution designed to meet the organisation's needs. We utilised Salesforce NonProfit Cloud, Sales Cloud, Marketing Cloud Account Engagement (at the time, known as Pardot), additionally, we also used FinDock.

First, our experts installed and configured the Salesforce NonProfit Success Pack (Salesforce NPSP) to accurately record organisations, individuals, affiliations and relationships, as well as donations, tax declarations, and contact preferences; amongst other relevant aspects that related to the charity. Nonprofit Cloud is a powerful Salesforce CRM designed specifically for charitable organisations; it empowers a charity's staff to save time, boost their output, engage stakeholders, and deliver positive experiences faster – all thanks to harmonised data and an intuitive platform that's built for success. Our experts crafted this solution to meet the customer's specific needs. This included a suite of tailored reports and dashboards to allow accurate reporting on the efficacy of fundraising appeals, as well as donor history, and much more.



Sales Cloud was also implemented as part of the charity's digital transformation. In this instance, we utilised Salesforce's intelligent sales and intelligence platform to handle campaign hierarchy, campaign influence, flow, SPSP's household account model, duplicate rules, and much more. Additionally, our experts included Marketing Cloud Account Engagement (MCAE) to facilitate better communication with donors, potential donors, and

other relevant stakeholders. Finally, it was paramount that a good payment solution was set up to operate as part of the customer's new CRM. FinDock was configured as part of this solution to generate and download payment processing files directly from Salesforce. The installation of this powerful tool provided custom functionality that allowed non-standard files sent from the bank to be uploaded and processed smoothly.

The Process

This project presented an array of significant challenges but Bluewave and our customer worked closely, as a team, to achieve a very robust system. When implementing the bespoke donation management solution, our experts experienced issues around file verification (a common problem that occurs when dealing with financial processes) but were able to rectify this situation using FinDock support. Another problem was solved via custom guided matching rules, allowing the implementation to continue as expected. The great working relationship between Bluewave and the charity resulted in a successful implementation, carried out on-time.

“The customer’s goals included having a system which increased the team’s efficiency and made their donor experience a lot smoother. Implementing FinDock, combined with Salesforce CRM, helped achieve this goal; making the whole payment process significantly easier, and more automated – which was one of the charity’s requirements.

We tend to deploy FinDock for customers who are looking for payment solutions that work seamlessly with Salesforce’s NPSP package, and we decided to factor it into this customer’s digital transformation because they needed a simple and secure payment solution that would simplify the current processing of direct debits and also enable them to take donations via various payment methods, such as credit card (both one off and recurring), direct debits, and wallets like PayPal.

*Working with this customer was a very productive experience for me, we worked together really well, and made a fantastic team.” – **Senior Salesforce Consultant, Bluewave***

One of the biggest challenges the charity faced when planning their move from Raiser’s Edge to Salesforce, was the transformation and migration of their legacy data. With so many long-standing donor relationships, and because the charity works very successfully towards the Relationship Model of Fundraising, its legacy data is invaluable. Therefore, it was decided that a large portion of their 17 years-worth of data needed to be brought over to Salesforce.

“It was a complicated, collaborative task between the charity and our teams to extract, analyse, deduplicate, transform and re-insert their legacy data. We designed a data model that would allow us to re-format the Raiser’s edge data into a format that would fit with Salesforce, NPSP and Findock and allow for seamless reporting across legacy and new data.

We used Talend for big data as the primary ETL tool to transform and insert the data into Salesforce. The Talend instance and all data files were stored on the customer's server which we accessed remotely.” – Functional Consultant at Bluewave

To comply with GDPR and data protection requirements, no data left the charity's server. In total, around 9GB of legacy data across more than 12 data tables was transformed and migrated into Salesforce successfully using this method.

“Throughout this project, I handled several report-building requests for this customer, with the main focus being on creating mailing and financial reports. As part of the brief, we created a wide range of custom report types that can access anywhere up to 8 object relations. These report types are then used to create matrix and joined reports which employ complex filter logic and multiple cross-filters. Developing this functionality was an exciting challenge, but with communication from the charity throughout, we were able to complete the task successfully.” – Technical Consultant at Bluewave



The Bluewave Way™

The Bluewave Way is our agile implementation process, which has led to the delivery of over 250 successful Salesforce projects and engagements over the last decade – the leading homelessness charity being counted amongst them. Bluewave's technical consultants and project managers worked in collaboration with the charity, from the beginning of their digital transformation, through to an ongoing relationship that is maintained to this day.

“What was so great about working with this customer was how passionate they were about the project. From day one, they wanted to be as hands-on as possible, in order to develop a deep understanding of the solution we were crafting, and how their internal teams would use it going forward.” – Senior Project Manager, Bluewave

Our team spent our early discovery sessions developing understanding the charity's vision for the project. We worked with the charity's fundraising team, collaborating with them to ensure all parties would be happy with the final result. We addressed the problems that each function within the fundraising team presented to us, in order to ensure that what we created would ultimately address all of these needs. In those collaborative sessions, we shared our knowledge and utilised the communication skills our experts are known for, to work towards a successful outcome. This outcome was not set in stone, and required tweaks and further

communication along the way; with the customer commending us on our flexibility throughout the engagement.

“As the project progressed, we continued to tweak different aspects of the platform to the customer’s changing requirements. Although we were thorough in our discovery sessions, as the solution started to really take shape, the charity’s fundraising staff would raise new issues or make suggestions. Rather than standing rigid in our original plan, we changed direction when needed, fully making use of the agile methodology that we call The Bluewave Way. We know our customers are always changing and adapting, and we do the same; working flexibly in order to meet their needs.

The charity was very keen to know what was going on, and we welcomed their involvement. It was great to see such passion and interest in our work.” – Project Manager, Bluewave

The initial engagement for the customer’s bespoke donation management solution reached completion in July, but our experts continue to work closely with this customer now. Currently, Bluewave provides ongoing technical support and staff training, which we provide to the charity’s fundraising team to ensure they’re getting the most out of the platform we’ve built. We admire the charity’s commitment to upskilling their team and will continue to support them in this endeavour.



The Results

The bespoke donation management solution that Bluewave designed for this customer was successfully completed on the 15th July 2022 – just four months after our initial conversation. The finished platform now provides users with a clearer, 360 degree view of their fundraising contacts, fundraising volunteers and donors; including a donor’s giving history, contact preferences, previous correspondence, involvement in appeals, as well as their relationships with other donors and organisations. All this is now easily visible on the platform and can be edited and managed from a single place.

By migrating from Raiser’s Edge to Salesforce, our customer has completely removed the risk of their primary CRM going out of date and no longer being supported, essentially they have future-proofed their core database. Additionally, by embracing Salesforce CRM, the charity now has much more control over its CRM and data. Data is now properly ordered with specific objects representing specific entities, which will allow for much less confusion

compared to their previous setup, and increased efficiency thanks to this streamlined view. Reports can now be generated by any user – not just admins who are delegated that task, freeing up their time to focus on other vital work. These accessible reports can now be used to easily gather constituent data lists quickly, should 3rd parties request them, or just to track campaign performance over time and make improvements.

With Findock implemented as part of the charity's new CRM, the processing of recurring donations is now significantly quicker and much simpler, with much less manual work needed from users. For example, payment data provided by the bank is now processed semi-automatically, with Findock removing a large portion of the manual steps previously needed.



Customer Feedback

Our experts were able to craft a bespoke donation management solution that better suited the customer's growing needs.

“Our CRM hadn't changed with us. As the team has grown significantly and our fundraising has grown over the years, Raisers Edge didn't grow with us. We had to continually find solutions and workarounds for it to facilitate our requirements.” – Head of IT at Irish Homelessness Charity

The charity's custom-built Salesforce solution resulted in improved efficiency in some of the charity's systems and we are working on others to facilitate similar improvement.

“We have taken a lot of the manual work out of our online donations; previously we downloaded an excel file from our website and recorded the donations on our website the next working day. Now, they are linked to Salesforce, their contact preferences are automatically updated, notes that donors leave on the Giving Page appear alongside their donation on Salesforce. We also now process the majority of our monthly credit/debit card donations via Salesforce (although we are still working on migrating 2 sub accounts from Stripe) which reduces the need for us to update Stripe and Raisers Edge – something we had to do previously, every time a donor amended their donation.

The direct debit processing system has also been streamlined with a much quicker system for processing donations and unpaid direct debits. As a continuation of this project, we are

working on integrating the tax reclaim scheme information and process – which was previously administered by two systems: Raiser’s Edge and Excel – onto Salesforce as well. This is reducing the admin time and risk of human error on our recording and processing of data and donations. We can see the impact on some work and are working on other processes at present.” – Head of Donor Services at Irish Homelessness Charity



This digital transformation has become an ongoing collaborative project between the customer and Bluewave’s technical and project management teams. As a result of this, there’s still more updates to be added further on down the line, including how the team’s use of Pardot (Marketing Cloud Account Engagement) benefits their organisation. With that said though, the feedback from the charity so far has been incredibly positive.

“I think the current result compares very well to what we expected, although we probably underestimated the time involved in the project and also underestimated the scale of the digital transformation that we needed. The main positives for us though, revolve around the fact that we successfully changed the way we process donations from people’s bank accounts, credit, and debit cards and there was no impact on the donors resulting from this. This was a huge achievement.

We have been planning the progression of our donor work for a number of years, but were unable to implement this with Raisers Edge, however, now that we have use of a modern, bespoke Salesforce solution, we will be able to progress on this work.” – Head of IT at Irish Homelessness Charity



Through the combined efforts of everyone involved, the leading Irish homelessness charity's bespoke donation management solution is now live as of July 2022. Bluewave continues to maintain a relationship with the charity's IT and leadership teams, and our consultants continue to work closely with them in a supporting capacity. We are very pleased with the collaboration process, the digital transformation we successfully implemented, and the relationships built as a result of this partnership.

"We are very proud of what we have achieved. It has been a very positive experience for all staff involved in the process. We are always very focused on providing excellent donor care and we believe that Salesforce helps us with that. We are also very focused on being efficient and getting best value for money so we are happy that we have invested wisely in a product that suits our needs and will help us grow into the future." – **Head of Donor Services at Irish Homelessness Charity**

Bluewave are experts in efficient and comprehensive digital transformation. Please [get in touch](#) to learn how our specialist offerings can assist your organisation in reaching its goals.