

How one client leveraged District360 Salesforce to simplify the process and make it less exhausting



The Client

Similar to most downtown districts, every few years, the Tenderloin Community Benefit District (TLCBD) is required to call on the property owners in their district to vote to renew and expand the TLCBD charter. As a Community Benefit District (CBD), Tenderloin is a formally recognized assessment district managed by a nonprofit organization dedicated to improving the quality of life in a defined region. They provide services like sidewalk cleaning, trash removal, safety ambassador patrols, beautification, and advocacy for policies and projects that will benefit the district, all of which are all supplemental to those provided by the city.



Challenges

- Persuade at least 30 percent of property owners in the district to vote Yes on the petition to renew the organization, and then Yes on the official ballot (there are more than 800 properties and more than 500 owners in the district)
- Use of spreadsheets to organize and manage the process made it challenging to stay current, determine who had the most votes, and divide up and assign outreach
- Inability to see who reached out to who, what their intended votes were, or any other feedback from stakeholders
- Spreadsheet could only be updated by one person at a time so data was never quite up to date and occasionally edits were lost to application malfunctions
- No easily accessible at-a-glance view of the progress

Goals



Move away from a locally owned “two-dimensional” spreadsheet system to a cloud-based “3-D” CRM for universal accessibility during the intense and truncated renewal timeframe.



Use the CRM to manage the renewal process so all property, account and contact data is connected and visible during the campaign

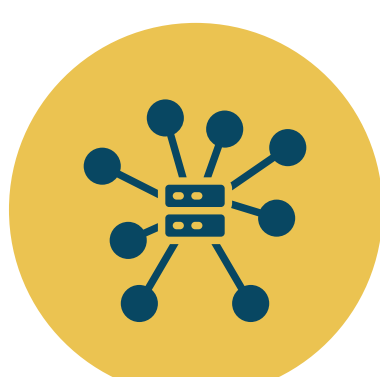


Have a single app to organize and manage staff outreach, lobbying efforts, and track progress



Dashboards and reports that show progress at-a-glance

Outcomes



Migration of data to the cloud-based District360 Salesforce CRM provided full transparency across the team, universal interactive access, and easily shareable dashboards and reports



Created a mechanism to sum votes allotted to each Property and a way to aggregate and rank Property Owners by their number of votes



Leveraged the activity tracking functionality to organize and manage staff outreach and lobbying efforts



Created a custom Renewal Campaign dashboard for an at-a-glance progress visual towards campaign milestones



Increased efficiency with up-to-minute accurate vote calculations, a full view of strategic engagement, and the ability to prioritize high-value targets



Option to hide fields associated with renewal efforts to maintain an uncluttered database with option to restore them for the next renewal cycle