

Case Study

A Jewish Nonprofit Migrates Their Community to Salesforce



The Customer

The customer is a US-based nonprofit Jewish community serving interfaith couples and families. They sought to adopt Salesforce Nonprofit Success Pack (NPSP) and update their toolset for managing donations and various members' requests.

Salesforce provides a specialized set of tools, features, apps, services, and technologies for nonprofits called Nonprofit Cloud. The core of Salesforce Nonprofit Cloud is called Nonprofit Success Pack. It incorporates a set of preconfigured components to manage contacts, donations, grants, and donor engagement. NPSP is open-source, free, and can be [downloaded](#) from Salesforce AppExchange.



What we did to accomplish our customer's goal

Our team analyzed organization-specific requirements and gathered existing data from disparate data sources. Then we completed the following tasks:

- installed NPSP, made changes in data models including the setup of custom fields, statuses, record types, and page layouts;
- prepared the data—deduplicated, cleaned, transformed it into NPSP's format;page layouts;
- imported the data;
- configured the security for internal users through the use of profiles, permission sets, field-level security settings;
- implemented custom web forms for capturing leads, gathering feedback, and receiving donations through the use of Formstack Integration;
- configured automated informational email messages for internal and external users via cloud flow designer and custom email templates;
- created automated promotional emails for external users by integrating an external marketing service, Autopilot.

The results

The new Salesforce-based community management tool lets the organization digitally transform their operations by equipping their members with a seamless and omnichannel online experience. This significantly improved the customer footprint and experience it provided to its members which eventually positively influenced the brand's value. The integrations with the financial systems provided a complete view of the customer from within Salesforce.



Brimit is a team of Salesforce experts.

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