

FOUNDATION

Oklahoma Medical Research Foundation

Increasing donations with holistic view of supporters

The Oklahoma Medical Research Foundation (OMRF) was founded in 1946 with the mission of conducting biomedical research that would help people live longer, healthier lives.

Since then, OMRF's scientists have conducted research leading to breakthroughs in the treatment of Alzheimer's disease, autoimmune diseases, HIV/AIDS, cancer, multiple sclerosis, and many other diseases and conditions.

Fíonta successfully supported OMRF in leveraging Salesforce and Marketing Cloud Account Engagement (formerly Pardot) to enhance and expand their development and fundraising efforts. By implementing best-in-class technology solutions, OMRF aimed to achieve a holistic view of donors, streamline reporting processes, and improve external communications.

Tech: **SALESFORCE**


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The implementation of Salesforce NPSP and Pardot has moved OMRF forward to the present and prepared us for the future, so that we are more competitive for scarce donation dollars. This important step has enabled OMRF to improve our communications with long-time and new supporters and donors.



Pain Points

Oklahoma Medical Research Foundation's outdated legacy systems and manual processes hindered development and fundraising activities.



01 **Outdated legacy systems and user experience**

OMRF's foremost pain point stemmed from its outdated legacy systems, which presented significant challenges for staff. These systems were difficult to navigate, creating a steep learning curve that limited the effective utilization of the organization's CRM and fundraising tools. The complex user interface slowed down daily operations, frustrating employees who struggled to adapt to the archaic systems.

02 **CRM limitations and communication challenges**

OMRF's CRM operated on a slow two-year update cycle, restricting the implementation of essential improvements and enhancements. Because of this delayed cycle, OMRF was slow to adapt to changing needs and emerging technologies. The lack of accessible and modifiable reports for development staff hindered their decision-making processes, and external communications struggled to reach the right prospective donors due to minimal list segmentation or integration with the core CRM.

Project Plan

To transform its operations, OMRF adopted Salesforce NPSP and Marketing Cloud Account Engagement (MCAE), complemented by customized training from Fíonta, to streamline donor and fundraising management while enhancing donor engagement.

With Salesforce NPSP, OMRF's development officers gained access to comprehensive donor data, empowering them to make informed decisions and dynamically maximize donor opportunities.

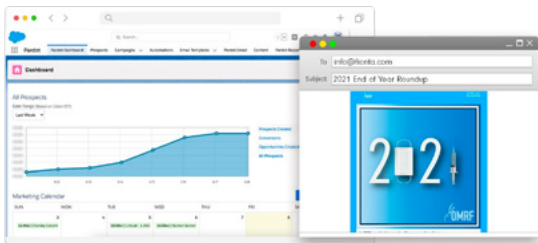
Salesforce NPSP's robust reporting capabilities simplified compliance and reporting tasks, providing valuable insights into operations they previously did not have.

Fionta assisted OMRF with MCAE implementation, facilitating compelling, scalable, and targeted engagement campaigns.

Fionta's customized training empowered OMRF's team to self-serve in report creation and data segmentation, reducing reliance on external support and fostering data-driven decision-making. This holistic approach positioned OMRF for sustainable growth and a more profound impact on medical research and philanthropy.

Results

The successful implementation of Salesforce and MCAE provided OMRF with streamlined donor and fundraising management, improved reporting capabilities, and enhanced engagement campaigns. With Fionta's support, OMRF has the tools and knowledge to maximize its development and fundraising efforts, ultimately enabling it to continue making impactful discoveries in biomedical research.



Streamlined donor and fundraising management

By implementing Salesforce, OMRF gained a comprehensive and easily accessible database of complete donor data. Development officers could leverage this data to inform their efforts and maximize opportunities, whether working in the office or remotely.

Customized training

Fionta's customized training empowered OMRF development officers and staff to become self-sufficient in creating custom reports, pulling segmented lists, and utilizing the full capabilities of the Salesforce and MCAE platforms.

Enhanced reporting capabilities and targeted engagement campaigns

Salesforce NPSP's comprehensive reporting functionality streamlined reporting processes for OMRF staff, making it easier to generate required reports and access valuable metrics. MCAE helped OMRF deliver compelling and scalable engagement campaigns seamlessly integrated with core Salesforce NPSP, ensuring that all engagement activities sync automatically with contact records.