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Case Study

Rialtes helps housing nonprofit digitize manual business process by implementing Salesforce

Executive Summary

Our client, a housing nonprofit organization was shackled
with legacy systems and disparate solutions for managing various aspects of their
organization. This was weighing down on the organizational capabilities of the nonprofit.
Another aspect that they needed help was with customizing membership driven data
management.

Our client, a US Non-profit organization catering to 400+ affordable housing agencies.
They are a housing 501(c)(3) Nonprofit organization that provides low cost learning
and networking opportunities to affordable housing staff members, business partners,
public and private sector professionals, and other public housing & management
professionals in the US.

Rialtes was brought in to streamline the organizational capabilities by implementing
and customizing the Salesforce NPSP..

Problem or Challenge

Being a membership focused organization, our client wanted
to customize their Salesforce NPSP which could keep their membership,sponsorships,
payments, training and events information organized and was scalable as the number
of members would grow.

The key challenges identified were in areas of Data
Management, Membership Management, Event Management and Expense and
Revenue Tracking.

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Data Management

Client had been using a legacy system to manage their memberships; the data exported from legacy system was found to be highly inconsistent, causing poor results, duplicative efforts, and wasted time.

Membership Management

Within the client model existed different types
of memberships, new business, renewals, etc. Without a simple process, it was difficult to send customized information based on membership level, interaction, and campaign. It was even more difficult to manage the everincreasing number of memberships as the organization scaled up; the existing process was not designed with growth in mind.
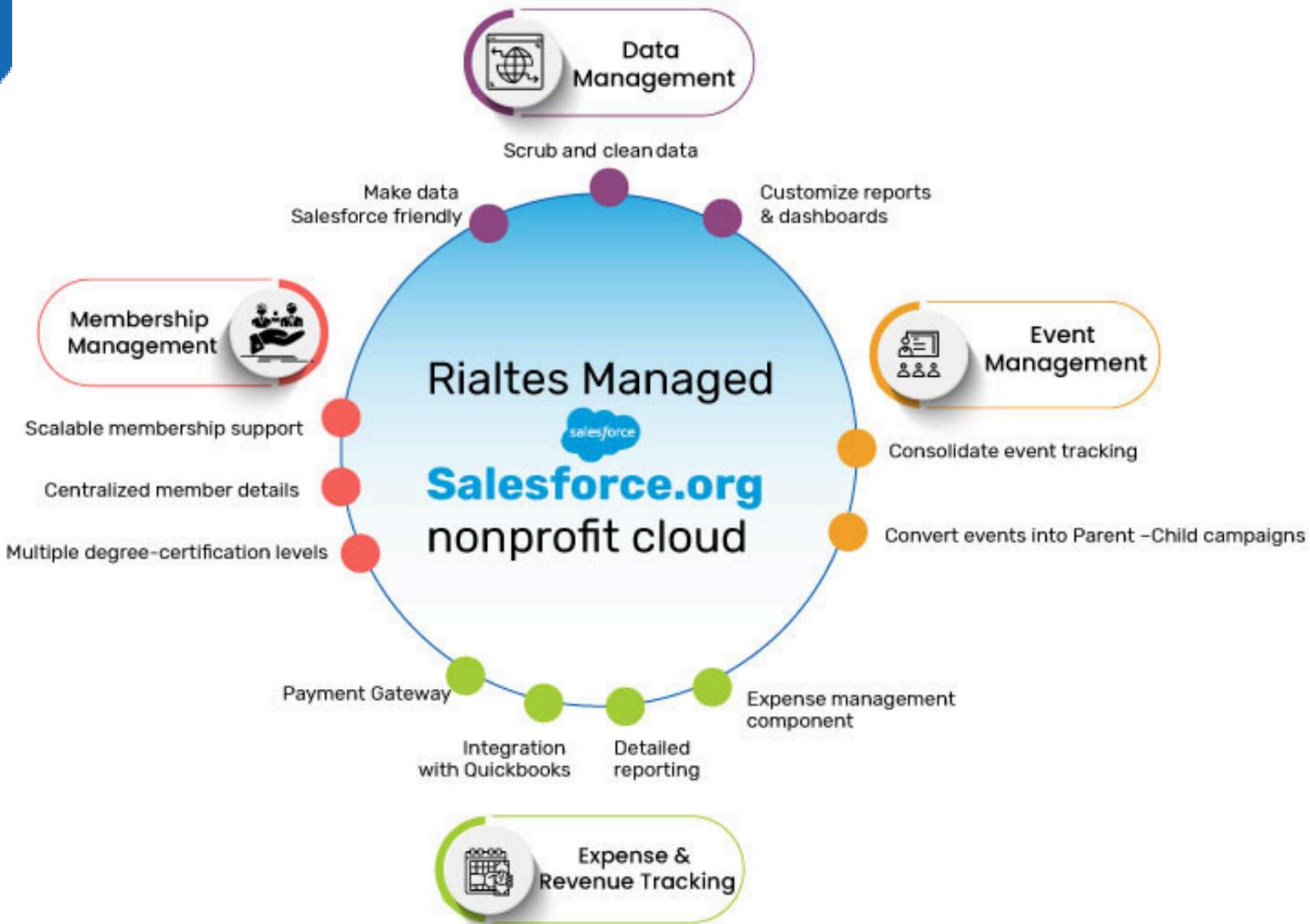
Event Management

Events and conferences have been a critical component of the business model since inception; events are a key platform for educating law housing officials and other risk management professionals. However, the management of events was being done manually, making it very difficult to engage members through events, programs and conferences.

Expense and Revenue

Tracking: Events and conferences, marketing efforts, licensing, memberships, and campaigning, all generate inbound revenue and outbound expense; one of the greatest challenges found in the previous model was the inability to track these components in an automated, clean, and related fashion. Invoicing and financials were tracked manually, through paper forms.

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Solution

To address this problem, Rialtes identified the key areas where simplifying and customization was required to improve efficiency. The broad areas defined were – Data management, event management, membership management and expense and revenue tracking.

Data Management
- Scrub and clean data
- Make data Salesforce friendly
- Customize reports & dashboards

Membership Management
- Scalable membership support
- Centralized member details
- Multiple degree-certification levels

Event Management
- Consolidate event tracking
- Convert events into Parent –Child campaigns

Rialtes Managed
Salesforce.org
nonprofit cloud

Expense & Revenue Tracking
- Payment Gateway
- Integration with Quickbooks
- Detailed reporting
- Expense management component

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Data Management

Simplified data collection through NPSP made it very easy to collect and load data from various sources. Putting the data in the CRM with all the relevant information created a consolidated view, while refining and restricting the field structure streamlined the data quality. Because the data sourced from another CRM, converting the data into Salesforce friendly terminology was the first step, followed by scrubbing the data and completing several system loads.

Reports and dashboards, designed exclusive to the objectives of the client, ensured that information about constituents could be extracted in real-time by any of the users. Reports that used to take hours to days to compile now take minutes. With information on their constituents, programs, and events now transparent and readily available, the team is more engaged and enthusiastic about the overall progress of the organization.

Event Management

Salesforce provides streamlined event management through "Campaigns". For our client, this includes Parent Campaigns (Q1 2017 Membership Event) and Child Campaigns (Membership Marketing Efforts). This allowed all event tracking to occur in a single consolidated location, such as calls, emails, invitations (outbound + responses), and costs/revenue.

Membership Management

Scalable membership supports an ever increasing number of members that join through various channels. Through NPSP, our client's national office and network of chapters operate more efficiently and are now organized. All member detail is now centralized on one platform, storing details like: contact information, payment history, education detail, and so on.

Education detail is a critical component for members, so is stored on each members contact record. Each member record supports multiple degree/certification levels, and allows for a quick view into their details:

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Expense & Revenue Tracking

The Salesforce Platform is unified, future-ready, and connected, with robust APIs and services that helps integrate back-office data systems. We integrated NPSP with Payment Gateway, allowing us to build streamlined processes to connect with Quickbooks; this integration helped in creating connections for transactions, such as estimates, invoices, and sales receipts; integrating this functionality in one system allowed us to create customized reports with insights for better cost management, planning, and general 'big picture' campaign understanding.

To support the expense management component, we built out the "Expense" functionality; this allowed for receipts, payroll, and so on, to be tracked directly on the source. If an event was scheduled under a "Campaign", expenses such as food, hall rental, and payroll, would be logged as an "Expense" record under the Campaign. The Zapier integration would then send the expense data to Quickbooks, provide detailed reporting, and give a much better understanding of the impact events have on the organization.

Results

The implementation has helped our client streamline its processes, manage and track constituents more effectively, thus ensuring significant improvement in operational efficiency. In addition, the Nonprofit Success Pack configuration will help keep membership, training and event information organized and easy to manage given the scalable nature of platform.

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