

Streamline with Salesforce

Non-profit Health Foundation



Challenge

With a commitment to education, advocacy, and research, a non-profit health foundation relies on funding from individual donors, partner organizations, and government programs.

The foundation acquired a variety of applications to track donations and manage communications, but the systems did not integrate.

- The siloed databases made it difficult to track appeals, donations, research requests, patient communications, and other activities.
- The foundation lacked proper security protocols, and with the number of people entering data, this was a key compliance issue.
- To produce meaningful reports, the client manually manipulated data, which was time-consuming and prone to errors.

The client needed a solution to extract, cleanse, and manage all data.



Solution

TEKsystems Global Services analyzed the current state and implemented Salesforce to track and manage all communications.

- Normalized data and deduplicated data across systems.
- Utilized Form Titan to enable tracking of all patient touchpoints and streamline collection of information.
- Integrated Classy, MailChimp, and QuickBooks with Salesforce to monitor communication, fundraising initiatives, and donor history.

After the implementation, Salesforce became the “single source of truth” for both donor and client records.

Results

TEKsystems Global Services provided a robust solution to streamline operations and enable authorized staff to view a client’s records, monitor donations, track activities, and collaborate via Chatter. The solution:

- Decreased reporting time by 75%.
- Increased income by creating tracked and reportable touchpoints.
- Provided a 360-degree view of all information and enabled the client to see a clear view of data at the individual level.

With our solution, data quality improved and was consistent across all sources and systems.

Our solution improved data quality, and the time to create reports **decreased by 75%.**