Powering Growth Through Unified Salesforce + Certinia Platform

Case Study—*Healthcare Nonprofit*

The Challenge

COALESCENCE

Industry: Nonprofit, Healthcare & Medical Research

Solution Area: Salesforce + Certinia Integration for membership, donations, events, and financial management.

Pain Points:

This healthcare focused nonprofit, serving over 18,000 clinicians and scientists worldwide, faced mounting challenges with siloed systems and manual workflows. Their diverse revenue streams—including donations, memberships, educational publications, corporate grants, and event registrations—were fragmented across multiple platforms.

This fragmentation created several day-to-day problems:

- **Inefficient Manual Processes**: Staff spent excessive time on manual data entry, which increased the risk of human error.
- **Complex Recurring Processes**: Weekly, monthly, and annual cycles were difficult to coordinate and prone to duplication.
- **Security & Access Issues**: With multiple stakeholders across departments, managing permissions and sensitive data access became a constant struggle.
- **Third Party Integration Gaps:** Key revenue activities such as event registrations and grant management relied on disconnected external systems.
- **Inconsistent Data Quality:** Siloed reporting prevented leadership from gaining reliable insights into financial and operational performance.

The Coalescence Solution

Coalescence implemented a **comprehensive Salesforce and Certinia integration platform**, designed to unify the nonprofit's operations from Lead-to-Cash. This solution included:

- **Custom Donation Portals**: Enabling streamlined pledge and individual giving.
- **Integrated Sales Portals**: Supporting educational material sales and resource access.
- **Membership Automation**: Seamless integration of third-party membership systems covering doctors, students and researchers.
- **Event & Grant Integration**: Connecting corporate grants, meeting registrations, and fundraising events via APIs.
- **Financial Tracking & Reporting**: Real-time dashboards in Certinia for transparency and improved decision making.

By automating workflows, reducing errors, and unifying data, the solution empowered the nonprofit to focus on advancing their mission.
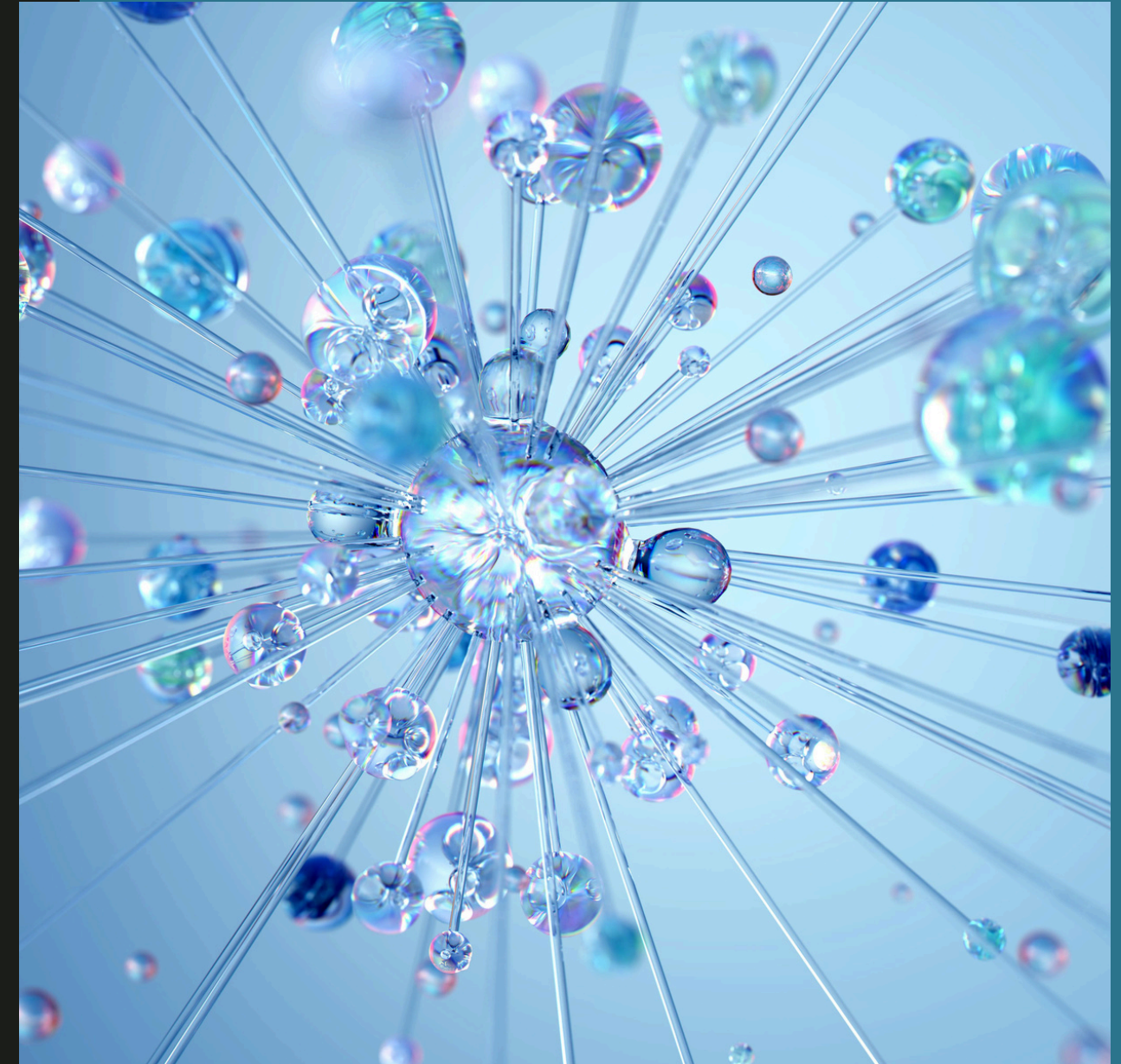
The Implementation
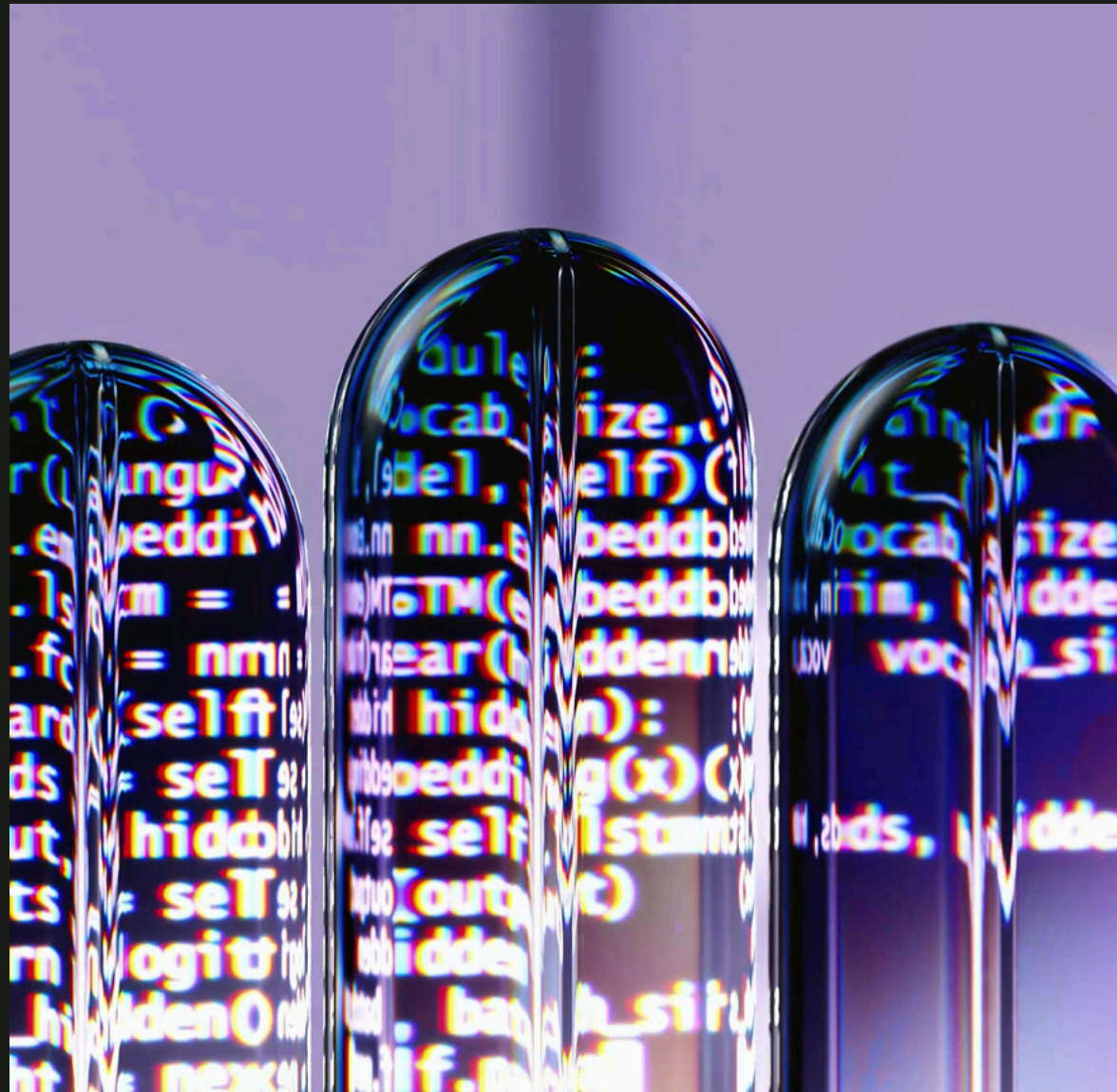
- **Step 1: Initial Assessment**
  - Engaged nonprofit leadership, Coalescence experts, and vendors
  - Reviewed workflows, revenue streams, and systems to define integration needs.
  - Prioritized alignment with nonprofit's mission and set performance metrics.
- **Step 2: Execution of Strategy**
  - Launched portals for donations, publications, and educational services.
  - Integrated third-party membership, event, and grant systems via APIs.
  - Configured Certinia for Lead-to-Cash management, followed by testing and staff training.
- **Step 3: Monitoring and Support**
  - Deployed performance monitoring and real-time dashboards.
  - Provided ongoing support and system enhancements.
  - Prepared for future AI and analytics capabilities.

Project Results

- **Significant Error Reduction**: Eliminated most manual data entry, lowering error rates across revenue processes.
- **Efficiency Gains**: Streamlined recurring processes, accelerating the order-to-cash cycle.
- **Scalability:** Seamless management of 18,000+ memberships across multiple platforms.
- **Financial Clarity:** Real-time dashboards improved funding allocation and revenue forecasting.

Qualitative Benefits:

- Enhanced member and donor satisfaction through intuitive portals.
- Improved collaboration across departments using unified data
- Freed staff to focus on advancing focus-area research and education.
- Positioned nonprofit for future growth with a scalable, AI-ready foundation.

"Working with Coalescence has been invaluable; they took the time to understand our business processes and made it easier to implement solutions that truly meet our needs."

~ Nonprofit Executive Project Sponsor

In Summary:

By partnering with Coalescence Cloud, Inc., this nonprofit successfully modernized it's complex operations into a **single, unified system** that supports memberships, donations, events, and financials with speed and accuracy. The result is not just operational efficiency, but a stronger foundation for global impact.