

# INTEGRATED STAKEHOLDER ENGAGEMENT & PROGRAM OPERATIONS



## PROJECT OVERVIEW

An organization delivering community programs required a centralized platform to manage stakeholder engagement, program operations, and communications. Existing processes relied on disconnected systems and manual workflows, limiting visibility.

Salesforce was implemented as a unified CRM to streamline engagement, program management, and communications while improving data visibility

## KEY CHALLENGES

- Stakeholder data spread across multiple systems, creating fragmented records and inconsistent engagement information.
- Limited visibility into program participation and operational activities, making it difficult to track engagement outcomes.
- Manual communication and campaign management processes, resulting in inefficient outreach and coordination efforts.
- Lack of integration between operational systems and CRM platforms, requiring manual updates and data reconciliation.

## RESULTS AND IMPACTS

- ✓ **Centralized management of stakeholder relationships and operational activities**
- ✓ **Improved coordination of program participation and communication initiatives**
- ✓ **Reduced manual effort through system integration and workflow automation**
- ✓ **Improved reporting on engagement performance and program participation**
- ✓ **Enhanced collaboration across operational teams through better coordination & program visibility.**

## Solution Implemented

Salesforce was implemented as a centralized CRM platform to manage stakeholder relationships, operational workflows, and communication initiatives.

The implementation included system integrations, data migration, and configuration of program and communication management capabilities to support the organization's operational needs.

## KEY CAPABILITIES DELIVERED

### Stakeholder Data Modernization

Migrated legacy stakeholder and operational data into Salesforce to create a unified platform for managing relationships and engagement activities.

### Operational System Integration

Integrated Salesforce with BizConnect to synchronize operational data and enable seamless information exchange between systems.

### Stakeholder Communication Platform

Implemented Salesforce Marketing Cloud to support stakeholder communications, newsletters, and targeted engagement campaigns.

### Funding and Contribution Management

Configured Salesforce to manage fundraising activities, enabling structured tracking of financial contributions and campaign participation.

### Program Participation & Activity Management

Implemented program management capabilities to track participant engagement, program outcomes, and operational activities, while supporting task coordination through activity tracking, reminders, & follow-up workflows.