Building a 360° view to reduce costs and elevate storytelling

CHALLENGE

Duplicate Salesforce instances were generating inefficiencies and driving higher than expected administrative costs. These inefficiencies were creating significant pain points and usage friction which was hindering leadership decision making and making it harder to tell the full story of the organization.

Solution

We built out the following:

- A centralized Salesforce instance to track data from six departments and multiple locations

- A consolidated and universal intake process across the different programs

- Attendance tracking for Adult Education and for Organizing events

- Campaigns tracking related to events, workshops, organizing/legislative/advocacy work

- Integrations with tools that allowed email marketing, form submissions, donations, files, and text messaging to seamlessly push/pull data to/from Salesforce

- Referrals tracking for internal and external referrals

- System to track participants' journey and engagement with the organization and different programs

- System to track memberships, leadership engagements, equipment tracking, orders/disbursements, appointments/referrals, and other operational work

- Upgrade to lightning user interface, customized apps, and home pages for each of the department.

Result

MRNY was able to consolidate processes into a single system, moving off of multiple spreadsheets, separate documents, and 2 Salesforce instances. Staff can now see a 360 degree view of each participants' engagement with MRNY programs and departments. A platform that was flexible and allowed MRNY to add functionality in phases over time, collecting user feedback and incorporating the feedback into the product in real-time. Salesforce usage has also increased, along with better and more complete data entry.

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"We tried and failed to overhaul our Salesforce ecosystem with multiple vendors before we finally found Idlewild. They helped us succeed after most staff had lost hope."

Ben Wolcott
Manager of Evaluation and Research
maketheroadny.org

Idlewild

Centralizing and streamlining key processes to drive improved collaboration

CHALLENGE

A disjointed and antiquated technology ecosystem was not able to deliver the fast-paced and flexible experience that was needed during a period of significant growth. Rather than focusing on value creation, significant teams and leadership resources were being misallocated to developing workarounds to business process inefficiencies.

Solution

We built out the following:

- A centralized Salesforce instance to track data from all departments and multiple locations

- Related all constituent data to single contact, to have every programs most important information available easily

- Advanced security settings to ensure that only the correct teams had access to sensitive data

- Automations that mirrored the desired business processes, reducing the number of required steps by half

- Integrations with tools that allowed email marketing, form submissions, donations, files, and text messaging to seamlessly push/pull data to/from Salesforce

- Streamlined donor management and engagement tools.

Result

SEO now has a unified system with Salesforce as the hub and single source of truth. All team,s are able to share and collaborate on their constituents, allowing the journey from high school to alumni and donor to be seamless for all concerned. Since the updates the fundraising and development teams have been able to exceed their gala's 'reach' goal at least a month prior to their last four gala events!

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"Idlewild have saved us so much staff time, we have finally been able to hire a butler for our ED!"

seo-usa.org

Improving centralization and efficiency to drive better decisions

CHALLENGE

Lack of a centralized and standardized was creating significant strategic challenges in addressing key areas such as funding prioritization, employee engagement, and giving pipeline. Siloed approaches across the organization were creating inefficient and laborious processes that were taking away the organization's ability to focus on value creation over administration.

Solution

We built out the following:

- A system for researching nonprofit organizations, inviting them to apply, and moving them through the Grant process.

- Online Application for grantees that feed directly into Salesforce

- Automated alerts and reminders around Grantee deadlines, reports, etc.

- Annual Board tracking, including Board Meeting Attendance

- Employee Matching Portal for MCF employees to login and manage their matching requests, view their matching history, view upcoming volunteer opportunities, and view the grantee portfolio

- Auto-generation of key documents such as Grant Contracts with e-signature, Grantee Invitations, Grantee Summary Analysis, Board Packets, etc.

- Approval processes for grants, payments

- Auto-batching outgoing payments for easy approval by finance

Result

MCF was able to centralize all of their philanthropic activities including grantmaking, the employee giving and matching program, volunteering opportunities, and board management. Providing a single source of truth for all Foundation efforts allowed MCF to see key metrics including: Total Grantmaking by Location, Program Area and Fiscal Year, Total Employee and MCF Matching by year, and Board Member Engagement.

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"Staci and her team are incredible! After vetting multiple consultants it was clear that Staci would be able to deliver the most effective, efficient, and reliable customization that our foundation needed."

Jamie Elfenbein
Executive Director
maverickcapitalfoundation.org