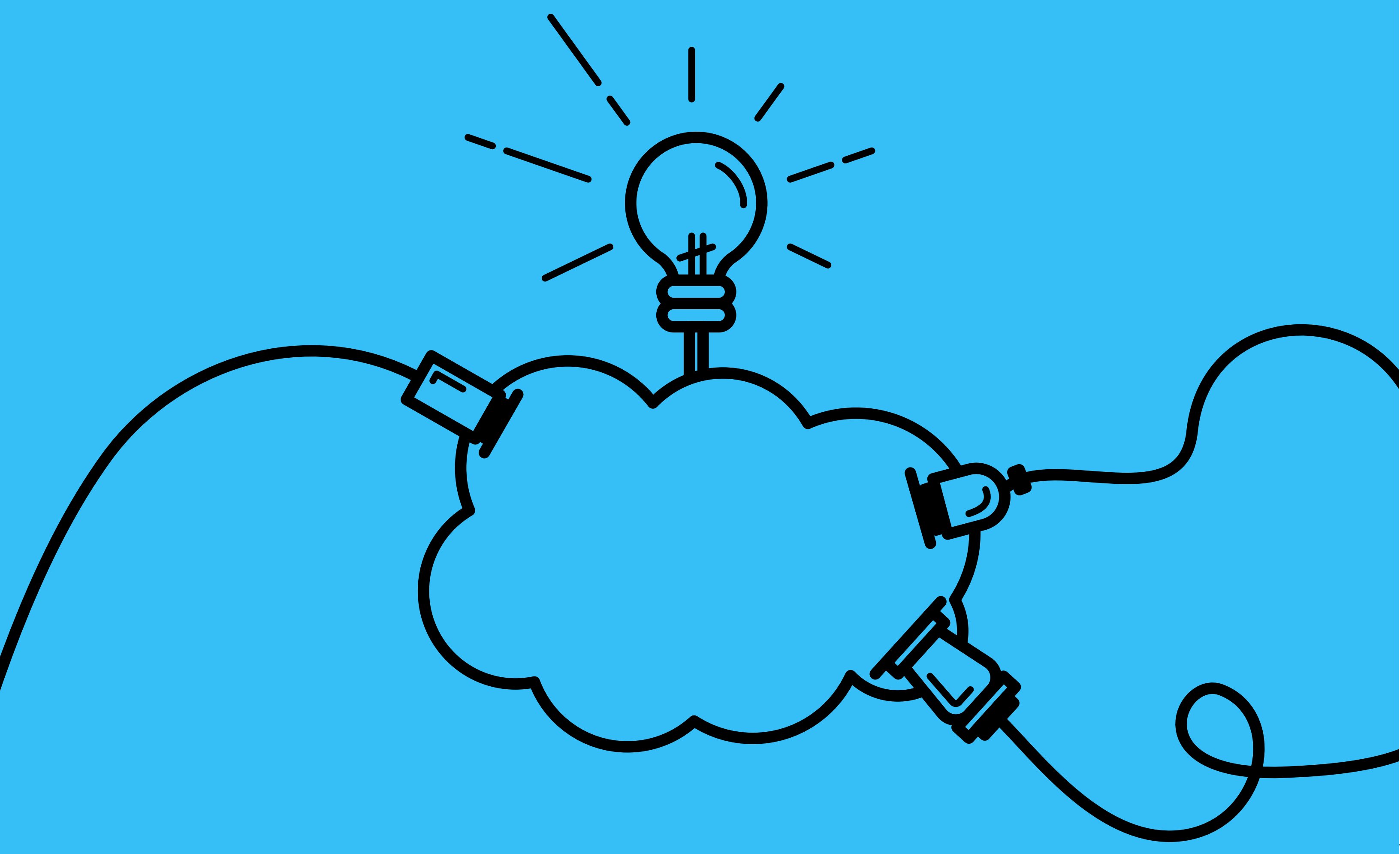
# THE POWER OF CENTRALIZED DATA

How the Classy-Salesforce integration drives growth.



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# Introduction

An organization's ability to deepen supporter relationships and grow its impact comes down to one key ingredient: data. Because your work is dependent on the support of your donors, you have to manage and track donor data efficiently and effectively in order to engage them in meaningful ways.

This can be painstaking and hard to track when you record information manually or spread it out across various storage systems. The process of importing and exporting data not only takes time, it also makes it difficult to get a holistic view of your donors and their history with your organization. When you can't track your donor's activity, you lack the insight to communicate with them in the most effective ways.

This is the problem that the Classy and Salesforce integration aims to solve. The integration makes it possible for all of your online fundraising data from Classy to flow seamlessly into Salesforce—a robust constituent relationship management system. This allows you to streamline your reporting, balance your online and offline fundraising strategies, and link online gifts to supporters' past behavior in real time.

When all of this donor information automates and collects into a single database, the data you need is always right at your fingertips. This guide explains just how centralized data can empower your organization to operate more efficiently and grow. You'll learn how it can help you:

- **Streamline and improve your internal operations**
- **Improve donor stewardship and build trust with donors**
- **Identify opportunities for larger contributions**
- **Prepare you for your next level of growth**

Let's get started!

# Chapter 1

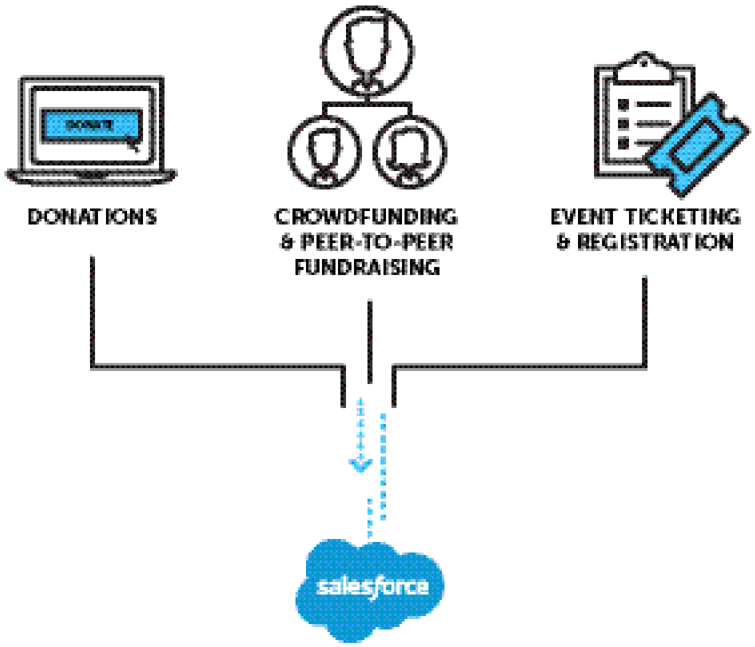
## Streamline Office Efforts

While the failure to consolidate data plagues organizations in a number of ways, some of the biggest challenges arise at the internal level. Data entry and workflow administration can take tons of time and energy away from carrying out your mission. With the Classy and Salesforce integration, you can spend less time on inefficient manual processes and more time on delivering excellent services.

## Eliminate the Need for Data Entry

Many organizations have both an online fundraising platform and CRM, but these two separate entities often do not integrate, leaving data isolated to each platform. You must therefore manually export data from your online fundraising platform and enter it into your CRM.

This process is time-consuming because your online platform organizes information one way, while your CRM reads it another way. As a result, staffers can spend hours on tedious data entry where they must reformat data from their online platform to feed it into their CRM. And, as with all manual processes, the room for human error creates another challenge.




Fortunately, the Classy and Salesforce integration removes the need for manual data entry. All of your online fundraising data from Classy donation, fundraising, and event pages transfers automatically into Salesforce.

This eliminates huge steps from your processes, and it also prevents any donor data from slipping through the cracks. You're thus able to dedicate more time and energy to your actual mission.

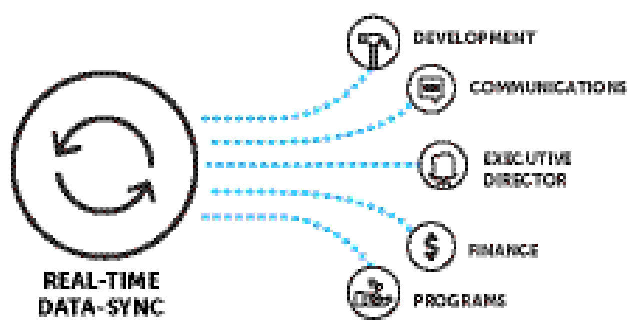
Before adopting Classy and Salesforce, Shining Hope for Communities (SHOFCO), an organization battling gender inequality and poverty by linking girls' education with community services, used a number of different fundraising systems. It was difficult for their small staff to log and track all of the incoming donations. The Classy and Salesforce integration solved this pain point.

Lexi Garber, SHOFCO's Director of Community and Outreach, says,

> *"Integrating Classy with Salesforce was very important for us because it drastically reduced our administrative effort."*
>
> **LEXI GARBER**
> *Director of Community and Outreach • SHOFCO*

## Streamline Internal Management

You can also leverage centralized data to improve your staff's overall communication and collaboration.




To start, a seamless integration between your online fundraising platform and CRM empowers your entire organization to stay up to date on how each department is interacting with donors. Staff members can see this information no matter where they are. By assembling your data in a single web-based, mobile-optimized database, multiple users can quickly access your information from different locations and devices.

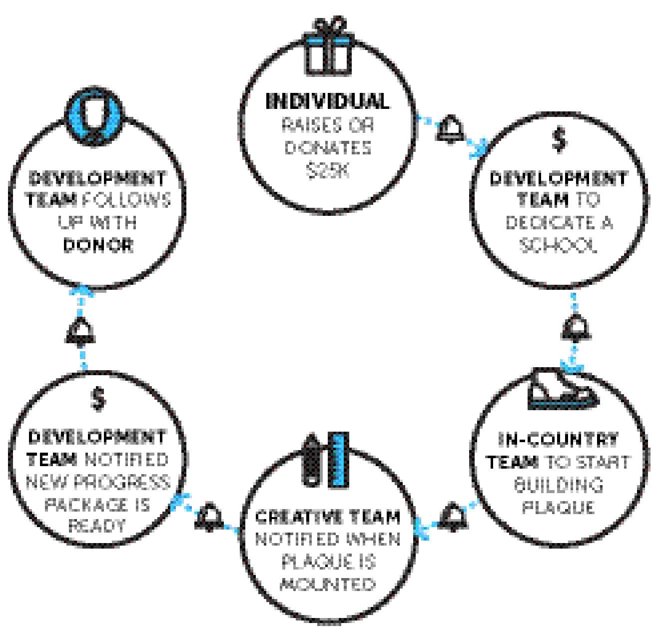
This visibility prevents uncoordinated efforts across departments. For instance, your events team might recruit a fundraiser for an upcoming walk. If others can't see this information in real time, a staff member heading a different campaign might reach out to the same person for a donation at the same time, making your organization appear disorganized and unaware of donor support.

On the other hand, consolidated, visible data that automates in real time drives cross-departmental collaboration and action much more effectively. Each staffer can see how each donor is being engaged. Remote staff members are no longer left in the dark, and different departments have quick and comprehensive insights into your online fundraising efforts as they fit into your organization's overall strategy.

## An Example from Pencils of Promise

This collaborative power enables Pencils of Promise's development, marketing, impact, and operations teams to execute projects together more efficiently. For instance, every time a supporter donates or fundraises $25,000, Pencils of Promise builds a school in their honor, creates a personalized plaque, and sends progress updates to the donor.

The data syncs in real time so that as soon as the gift comes in, a notification is sent to the development team in Salesforce to dedicate a school on behalf of the donor. Once the school is selected and attached to the donor in the system, the in-country staff is notified to start building the dedication plaque. Afterwards, another notification alerts the marketing team to prepare a follow-up package for the supporter, which includes



a personalized mini plaque. These automated alerts continue to notify each team when it's time to execute the next task.

Throughout this entire process, staff can log in from multiple locations for updates. The plaque build, for instance, takes months to complete, but team members can keep a pulse on its progress the entire time. Jackie Roshan, the organization's Senior Data Operations Manager, says,

> *"Our teams on the ground start that process and continually update where they are with building that plaque. We're able to log in at any time from New York, see where they are, and then update our donors on the progress of the plaque and school build."*
>
> **JACKIE ROSHAN**
> *Senior Data Operations Manager • Pencils of Promise*

Roshan asserts that consolidated data and automated updates make cross-team collaboration like this possible. "We have taken a process that involves different departments and allowed them to seamlessly communicate with each other," she says. "In the past, it took up to one year to deliver donor plaques. We were able to decrease that turnaround time to just under three months, and it's all because we've automated the process in the backend."

The Classy and Salesforce integration streamlines your operations and creates visibility of your data, which empowers your staff to communicate with leaders, supporters, and each other more effectively. You're not just setting yourself up to save time, improve efficiency, and foster transparency, you're also building your credibility.

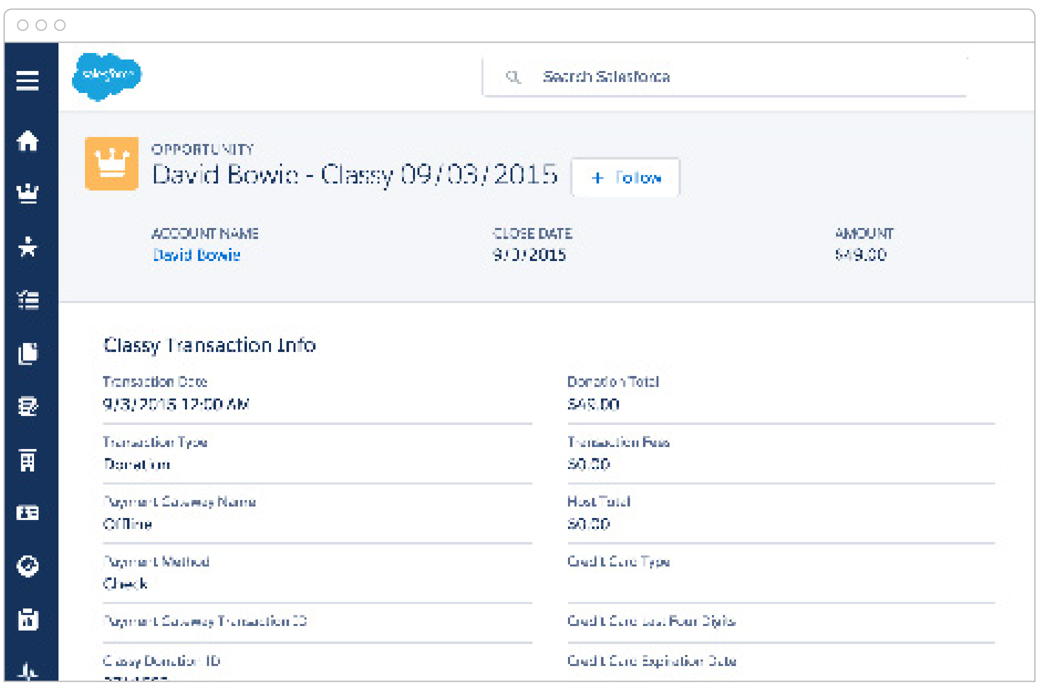
# Chapter 2

## Improve Stewardship

With all of your donor data in one place, you can transform the way you interact with supporters. The ability to track all of their interactions with your organization, both online and offline, will help you streamline your reporting and cultivate your base of supporters.

## Get a 360° View of Donors

By incorporating the donor and fundraiser data coming through Classy into Salesforce, you can better manage the relationship between your online and offline fundraising strategies. You're able to see how supporters have interacted with you through multiple channels, all in one place.




This gives you a complete picture of your supporters and their history with your organization.

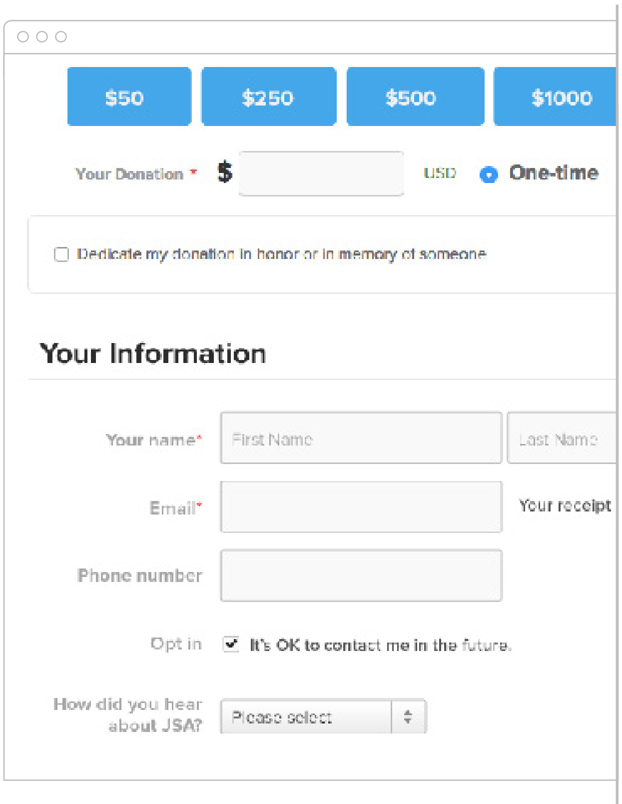
You can see that a donor has made two gifts this year, one offline and one online. You can check which gift was bigger, and which appeal generated that gift. You can see they've also fundraised twice, both times for the same annual campaign and program. With these insights, you send targeted content and meaningful appeals that touch on their specific interests, and you can drive engagement.

This holistic view of supporters has impacted the way that Play Rugby USA, an organization developing youth through rugby programs, plans their communication strategy. Leo Purtill, the organization's General Manager, says,

> *"The ability to integrate donor information coming through different platforms enables us to build much more successful and accurate segments of donors."*
>
> **LEO PURTILL**
> *General Manager • Play Rugby USA*

Using Classy's custom question functionality, you can also ask questions on your online donation form to learn about donors' interests or how they heard about your organization. This data gets funneled into Salesforce so you can further segment and personalize your outreach.

The Junior State of America (JSA), an organization that prepares students for leadership and involvement in a democratic society, finds this capability particularly powerful. Matthew Patchell, the organization's Chief Development Officer, says,




*"At the point of donation, we ask donors to share their relationship with the organization. For example, are they a parent, family member, teacher, or friend of a JSA student or alumnus? Their answer goes straight into their contact record in Salesforce. Because the integration also enables mini-campaigns, we can segment our contacts and message very specific communities in a way that resonates with them."*

**MATTHEW PATCHELL**
*Chief Development Officer • JSA*

Simply put, all of a donor's information and touch points with your organization are collected into one database for you to better understand their interests and giving habits. This comprehensive data empowers you to interact on a more personal level with individual supporters, as well as create accurate donor personas so that you can target groups of donors. You're able to identify their goals and passions, track which channels they use to interact with you, and create hyper-targeted content that resonates

Know Your Donors *Field Guide*

To learn how to create donor personas, check out our Know Your Donors *Field Guide*, complete with a customizable template.

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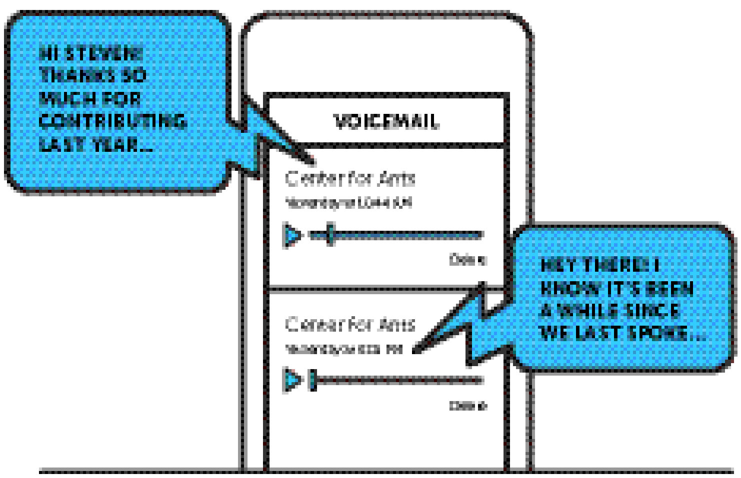
with each audience. You can use these insights to inform your fundraising and marketing strategies, so you can create targeted campaigns and follow up with meaningful donor engagement.

## Build Trust With Your Donors

In the same way that a complete picture of your donors is empowering, an incomplete picture is debilitating. Perhaps the biggest problem scattered data causes is the inability to engage donors according to their historical relationship with your organization. Departments can also be so segregated that they often have no idea how donors are being engaged by other staff members. This lack of organization and awareness can cause your donors to lose trust, making retention an even bigger struggle.

For example, let's say two staff members from different departments, unable to see supporters' complete histories, solicit the same donor at the same time. The donor is left wondering, "Why is this other person asking me for a gift when I'm already fundraising for their 5K?" They would be confused and turned off by the lack of coordination.



Your level of customer service can also decrease heavily due to your inability to quickly read donor data. Let's say a $50,000 donor, who gives online, calls with a question about an event. The staffer speaking with them is unable to access the donor's online giving history and has no idea how this donor gives, so they end up providing a generic reply. The donor on the other end, expecting a response with more consideration, may hang up feeling offended that they weren't treated in a way that reflects their level of support.

These types of situations can make your organization appear ungrateful and unaware of donors' involvement. However, by capturing donor data in a central location, all staff members can track all of your supporters' touches with your organization. Staffers can quickly see how much donors have given, what channels they gave through, who they've talked to, and how they should be followed up with.

Not only does this allow your team to present a unified front, but it also makes your donors feel like they have a relationship with your entire organization—not just one point person. Effectively track and manage data this way, and you can strengthen relationships and boost donor retention.

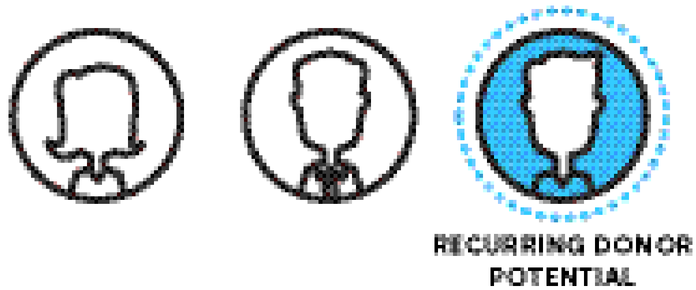
## Identify Opportunities

By capturing all of your donor data in one place, you can analyze engagement levels and identify opportunities for larger contributions. As your online fundraising data from Classy flows into Salesforce in real time, you can use Salesforce's robust reporting and analytics to recognize those supporters who should be acknowledged and nurtured toward greater levels of giving.

You can use the reporting to answer questions like, who are my top donors? Who are my top donors, specifically from this year? Who are my top fundraisers? Which campaign were they involved in? Were they involved in more than one campaign?

You can spot someone who may be primed for major gifts or your recurring gifts program, or perhaps a power fundraiser with the potential to raise hundreds of thousands for a similar upcoming campaign. You might even identify a potential board member. Rather than letting these opportunities fall through the cracks, you can pull data to help you target the people to engage, encourage, and guide down the appropriate nurturing funnel.

By consolidating all of your donor data, you can use that information to drive strategic decisions from a fundraising, marketing, and operational standpoint. You can personalize communication strategies that can strengthen relationships and move supporters toward greater levels of involvement. Centralized data arms you with the insights you need to increase donations and grow your overall donor base.



# Chapter 3

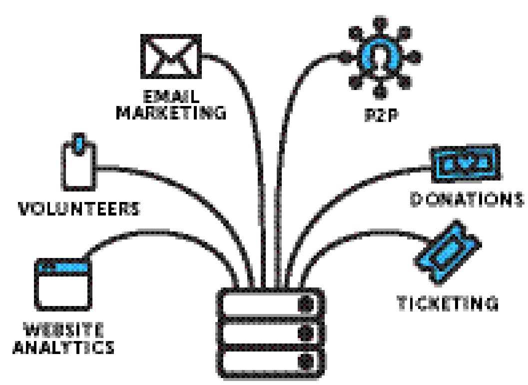
## Grow and Scale

The process of managing data across different systems or excel sheets is expensive, cumbersome, and inefficient. More importantly, it's unsustainable once your organization begins to grow. You need to unify your data in a central database that can *grow with you*. By leveraging the connection between Classy and Salesforce, you can streamline your operations to prepare your organization for scalability.

## Integrate Various Systems Into One

Many organizations use numerous systems to store their data. They might have separate tools for their email marketing, CRM, online donations, third-party event ticketing, auctions, volunteer management, analytics, and website optimization. This forces you to manually export and import data across the different platforms, and track the various transactions coming in through several different revenue streams. You must manage all of this individually, leaving you vulnerable to human error.

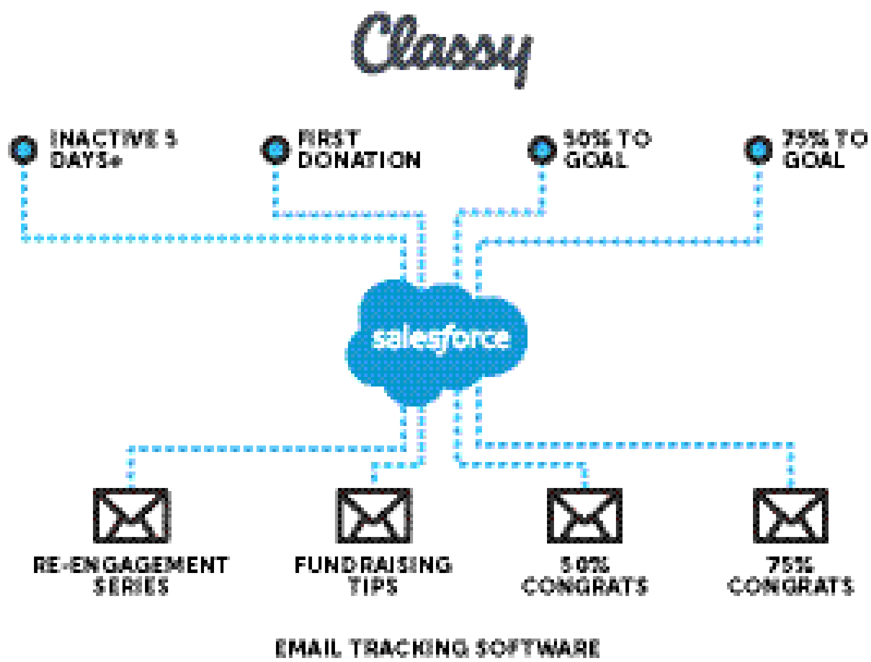
Salesforce, however, is an open CRM that allows you to feed different applications into one platform. That means even if you have separate solutions for email marketing, fundraising management, or inventory management, they can integrate easily.



## Allow Your Systems to Work Together

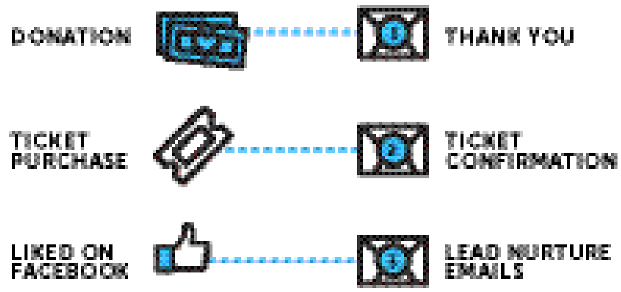
When your systems integrate through Salesforce, it not only becomes easier to manage your data, but it can also make each element of your fundraising and communications even more powerful. Data that comes in through your Classy fundraising pages transfers automatically into Salesforce, which can then fire off workflows in other systems to improve the way you reach back out to donors.

One example is to set up automated messages in your email marketing software based on the information that comes in through Classy. During a campaign, you can schedule specific emails characterized by supporters' fundraising activity. When a supporter makes a gift, creates a fundraising page, or has any activity (or lack thereof) on their page, that information gets logged into Salesforce. You can configure the platform to notify your email marketing software to fire off an email series based on this data.




If a supporter made a donation, your email marketing software can deliver an email series thanking them for their gift and asking them to create a fundraising page. If the supporter created a fundraising page but hasn't raised any funds for a specified amount of time, you can send another email series encouraging them to get started. If the fundraiser is actively raising money, you can set up another series congratulating them for reaching certain milestones and cheering them on toward their goal.  This type of communication can activate supporters and encourage involvement.

In short, systems that integrate can end up generating better results than if they stood alone. By consolidating all of your platforms into one, your Classy fundraising data can power other facets of your operations.




## Customize Your Systems

Because Salesforce integrates with so many different systems, you can adjust your solutions to your individual needs. As your organization reaches new levels of growth, you can customize and extend the platform as desired through apps on the Salesforce AppExchange, an online marketplace of downloadable tools for the Salesforce community. Many of these tools are free or discounted for nonprofits and they can save you from developing custom solutions or paying for another platform.

There are a lot of apps customized specifically for nonprofits, such as volunteer and case management tools. For example, iEmpathize, an organization working to end child exploitation, uses the application "Volunteers for Salesforce."

> *"We are able to use this application to track and store our volunteers' information, their specific interests and skills, and number of hours they volunteer for us. We are currently building out a webpage that will display a volunteer opportunity calendar and a short volunteer registration form. These tools, that are all linked back to Salesforce, will permit us to send targeted communications to volunteers with the specific skills that match the needs we have."*
>
> **MIKE SMITH**
>
> *Director of Donor Development • iEmpathize*

When you consolidate multiple platforms into one, you can streamline your operations in a way that powers your growth. And Classy is just one of the thousands of platforms that integrate with Salesforce. The ability to tailor and extend your central database gives you the opportunity to scale with ease.

# Conclusion

The integration between Classy and Salesforce allows you to understand supporters deeply, and make more meaningful connections with each one. It enables your team to collaborate and operate more efficiently, eliminating many manual processes and providing comprehensive insights in one place. By centralizing your information, you can make fundraising and marketing decisions driven by data, not guesswork, and ultimately improve the way you communicate with donors—without tripling your staff. These streamlined processes can increase your operational capacity to grow your organization and advance its mission.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