

“Salesforce has been a real boost for our nonprofit organization. We can now manage volunteers, donations, marketing, events and grants from one simple, efficient location. I would like to thank Idealist Consulting for their help implementing this technology and most of all I would like to thank Salesforce.com for making this technology available to us. You have truly started a revolution for Nonprofits.”

*Laura Peterson
Director
Hands to Hearts International*

Hands to Hearts INTERNATIONAL

Challenge

To configure a system that managed and tracked:

- Donations and pledges
- Events and promotions
- Grants and funders
- Volunteers and members
- Reports & charts
- Mass emailing
- Newsletter recipients
- Online donations
- Document management
- Personal calendars (for multiple users)
- Duties and tasks

Additional Challenges:

The system needed to be simple to use with the ability to grow with the budget of the organization.

Solution

Idealist Consulting approached HHI with an established nonprofit configuration. This configuration provided the ability to purchase the configuration in “segments” allowing HHI to consider budget restraints, future funding and growth. Moreover, each segment was implemented quickly allowing the HHI to begin utilization within days rather than weeks.

Results

- Increased efficiency with fundraising events
- Increased online/offline promotional reach
- Maximized opportunities with donations and pledges
- Enhanced PR due to timely correspondence with donors, volunteers, staff and funders
- Up-to-date knowledge of available human resources
- Enhanced proficiency with volunteer management.
- Fast user adoption

With the help of Idealist Consulting and salesforce.com, Hands to Hearts International finds a CRM solution that is easy to use and affordable.

Hands to Hearts International (HHI) trains and employs women in developing countries to give therapeutic massage to infants and children in orphanages. By promoting individual and collective empowerment to unskilled, uneducated women communities will be forever altered. These women not only provide nurturing touch to orphaned children, but they also become empowered through gainful employment.

HHI is an international organization which works with volunteers, staff and interns throughout the globe. As a result they required a CRM solution easy to use and that could be accessed internationally.

In February of 2005, after evaluating several Nonprofit CRM solutions, Hand to Hearts International selected salesforce.com as its CRM application.

“We selected salesforce.com because of the configuration provided by Idealist Consulting. This simple design with an easy to use training manual became the obvious choice for our growing nonprofit.”

Laura Peterson
HHI Director

Choosing Salesforce.com

For a nonprofit to succeed it must have a well defined mission with tangible results. These characteristics are essential in order to be attractive to funders, donors, volunteers and other potential supporters. The With a little help from Idealist Consulting, Salesforce is specifically designed to help nonprofits manage and maintain these relationships. Hands to Hearts International recognized this and decided that Salesforce.com was the ideal solution.

“There are a number of CRM’s out there for nonprofits and choosing one can be more difficult than implementing one.” Said Laura Peterson (Director of HHI). “We needed something that was simple and affordable yet all-inclusive. It was not until we spoke with Idealist Consulting that we knew we no longer needed to look for other options.”

HHI chose Salesforce because it was a web based solution that could be easily accessed anywhere in the world. More importantly, it was the most affordable and flexible solution available. The Menu of services [a configuration developed by Idealist Consulting] uncovered these positive characteristic thereby making Salesforce the obvious choice for HHI as can be realized through Laura Peterson’s tribute...

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Implementation of Salesforce.com

"We chose Idealist Consulting to manage our salesforce.com implementation because they are very familiar with the nonprofit environment. They are also able to break down technology in terms that are digestible to staff and volunteers who are not comfortable around technology." said Laura.

The menu of services allowed us to purchase in “segments” permitting HHI to consider budget restraints, learning curves, future funding and growth. As a result the Salesforce was implemented at a pace HHI was comfortable with. Laura decided start with the Accounts and Contacts segment. She then moved onto the Donations and Grants segment--And then completed the configuration with the Events, Reports and Documents segments.

“We could not have asked for a better process—that’s largely because we chose what segments we needed at the time we were prepared to implement them,” said Laura. We did not need to deal with the slippery slope of hourly rates which made it much simpler for everyone.”

Training

Training HHI staff was a critical element of the overall implementation. From the beginning, "User Adoption" was a primary consideration. “We didn’t know enough about CRM databases or anything in that scary box (Computer) to start from scratch. Idealist Consulting really helped us to frame our needs. We could focus on adoption rather than design. That made all the difference,” said Laura.

Idealist Consulting worked closely with HHI to make sure that the new technology was embraced. This included a walkthrough of the configuration as well as a guidebook specifically designed for beginner users. “The guidebook that accompanied our Salesforce configuration really took out some of the mystery of all this technology. It is written in a step by step format which allowed us to be self-sufficient and reduce our reliance on outside help,” said Laura

Additional training sessions were delivered in person, which helped to solidify adoption of Salesforce.com. At the end of project both Laura and the HHI staff were pleased with the outcome... "The training, for us, finished a very rapid, successful project that we will reap the benefits from for years to come."