

From 360 Different Views to One 360 Degree View



“Heller Consulting was instrumental in the success of our CRM deployment, particularly advising and asking the right questions of us when we ran into decisions we knew would impact us long-term.”

Lisa Fay Wellek
National Director CRM
JDRF

Challenges

With a national office and 110 chapters and branches, JDRF is the leading global organization funding type 1 diabetes research. The organization had dozens of disparate technology systems — including spreadsheets, databases, and online marketing tools — which created several challenges:

- No single system could demonstrate a complete view of each constituent’s involvement with the entire organization.
- Legacy technology built on various data models made integration nearly impossible.
- Staff members found it difficult to provide a unified experience for constituents while juggling multiple systems.

Solution

After multiple attempts to implement CRM were unsuccessful, JDRF turned to Heller Consulting to lead system design, configuration and the overall project. Here’s how the Heller team helped JDRF tackle their challenges:

- Created a CRM strategy and system design to get JDRF’s project back on track
- Helped JDRF extend their use of Salesforce.com beyond fundraising to program management, volunteer management, and more
- Created documentation and training materials and provides ongoing services when JDRF needs an extra hand with training, project management, and system administration

Results

- **Simplified technology** — JDRF has a unified system that’s easier to use and support for managing data and processes across the organization’s national office and chapters.
- **Consistent constituent experience** — Staff members can now view, manage and access constituent data in a coordinated way through a single system, allowing them to engage with constituents more consistently.
- **A system for growth** — With Salesforce.com as their single platform, JDRF can modify processes and integrate new technologies as the organization grows.

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