

# National cancer organization creates a 40% increase in their fundraising activity



“We largely attribute our successful transition to Salesforce to working with Heller Consulting. They took the time to understand our processes and worked collaboratively to find the best solution to our needs.”

Senior Database Manager

## Goals

This organization’s national events help raise money and support for all those affected by cancer. To operate these events more efficiently, the organization’s staff set forth the following goals:

- Improve the systems behind the events in order to significantly improve participation and increase fundraising.
- Allow for integration of staff, volunteers, and external vendor communications to enable more strategic fundraising communications.
- Ensure participants could quickly and accurately see their progress towards meeting fundraising goals.

## Solution

The Heller Consulting team contributed to the complete package of improvements in several ways:

- Moved the organization to the Salesforce platform to provide needed flexibility and enhanced integration potential.
- Built and developed clear dashboards to allow management to gain strategic insight into activity and goal progress.
- Created workflows that helped ensure resources were targeted to those places where they would have the greatest impact.
- Provided training and documentation to staff to ensure widespread adoption of the new system.

## Results

- **Improved Processes** — Effective training on efficient tools allow the organization’s staff to support participants faster and easier for maximum fundraising effectiveness.
- **An Integrated System** — With the integration between the Salesforce platform and Lockbox, participants, staff, and management can easily view the information they need.
- **Increased Fundraising Activity** — By making effective program improvements for staff and volunteers, the organization’s events saw a 40% increase in fundraising activity.

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