



## Improving Engagement with Military Community

### Challenge

- Existing systems neither provided required level of reporting nor 360° view of contacts and organizations.
- All departments used same CRM system and faced issues due to limited functionality and data inconsistency.
- Need to move from existing CRM system and excel sheets to Salesforce.
- Need to track and manage stock of event-supporting material sent to end users and volunteers.

### Our Solution

- Implemented Salesforce and NPSP V3 to provide 360° view of donors, survivors and other contacts.
- Implemented Donation Management, Household Model, Fundraising Management.
- Integrated Salesforce with their website.
- Installed AppExchange products such as Event Brite and Campaign Monitor.
- Customized Salesforce to manage their control and track product stocks.
- Assisted in preparing data in Salesforce format and pushing it in Salesforce.

### Business benefits

- Decreased level of duplicate information.
- Improved communication and information sharing across departments/teams.

### Client Description

- Volunteer driven charity committed to organizing events to remember the veterans and military families.
- Team of volunteers supports the charity in arranging and managing events across the country.
- CRM Filemaker and Excel sheets being used to store Organizations, Contacts, Volunteers, Fundraising, Donations, etc.

- Ease of entering new contacts and monitoring interactions with them.
- Ease of managing and growing fundraising.
- Improved reporting capabilities.
- Ease of capturing, tracking and maintaining accurate product stock level.
- Reduced administration by integrating with the website.

## About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.

 CloudChillies



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