

CASE STUDY: NON-PROFIT ROADMAP TO MEMBER ENGAGEMENT

COMPANY OVERVIEW

This organization is a National Professional Fraternal Organization based in Indianapolis, IN. They provide professional training and connections to help collegiate student members to be prepared for working in a professional global market.

COMPANY PROFILE

Location	Indianapolis, IN
Employees	24
Industry	Non-Profit Professional Fraternity
Competitor	N/A
Solutions	Sales Cloud, NPSP, Community Cloud, chatter, Venue, ChapterSpot
Go Live Date	7/1/2018 and on-going



CHALLENGE

The client had implemented Salesforce as a Platform as the system of truth for their students, volunteers and alumni. The initial standup was messy and there was dirty data imported from legacy systems. The client was feeling frustrated with low user engagement and users switching back and forth between Classic and Lightning Experience due to poor customization.

SOLUTION

De-duplicated data that was imported into the system to ensure a one to one match for contacts

Worked with ChapterSpot to implement their managed package for member tracking and reporting while removing old custom code using webservice callouts to sync data

Implemented Community Cloud for approximately 200,000 individuals ranging from current students to alumni including the following features:

- Automation of community user creation based on salesforce data
- An e-commerce platform
- Reporting on current and past members related to their chapter
- An LMS that grants learning to members based on Salesforce Data on the individual
- A donation page that shows current and past donation levels
- Event Registration Page

“ All internal members are using Lightning and do not feel a need to switch to Classic to do their day to day tasks. ”

THE RESULTS

75%

Of members are logging into the community and increasing daily.

8000

Learning plans have been completed and growing.

300+

Orders have been placed through the store compared to 171 in the old system