

CASE STUDY: ORGANIZATIONAL PROCESSES IMPROVE WITH SALESFORCE CUSTOMIZATION



BEADFORLIFE, COLORADO—Launched in September 2004, BeadforLife is a Colorado 501(c)(3) nonprofit organization that is part of an international grassroots movement to overcome extreme poverty by creating bridges of understanding between impoverished Africans and concerned world citizens.

BeadforLife's members are hard-working and intelligent women from Uganda and other countries, who make beautiful beads from colorful recycled paper and turn them into necklaces, bracelets and earrings. They also gather shea nuts and press them into shea butter for soaps and cosmetics.

These products are sold through BeadforLife's online store and Bead Parties hosted by people in the community who are committed to making a positive difference in the lives of others. The sales help support BeadforLife's programs providing education and opportunity for its members.

THE BUSINESS CHALLENGE

At the time BeadforLife began searching for a new CRM, around 70% of the funds that BeadforLife generated for its programs came from Bead Parties at which the colorful beaded jewelry is sold.

BeadforLife was looking for a new CRM system as the one it was currently using did not integrate well, but the organization also wanted a system that would provide the capacity to do more Bead Parties.

"We were handling 1500 to 1800 Bead Parties each year and the staff was complaining about how much work it was and saying that we needed more technological support," explained Heather Ditillo, BeadforLife program director for North America and Europe.

"The CRM system we were using was a basic, antiquated system that only tracked customers and did not allow us to manage activity or gather important information for reporting."

In 2009, BeadforLife started using Salesforce.com and through the Salesforce.com Foundation, learned of AccuFund CRM, a consultant specializing in helping nonprofits and charities manage their fundraising activities on Salesforce.

"AccuFund CRM was highly recommended by the Salesforce.com Foundation," said Ditillo. "Salesforce.com is committed to giving 1% of its revenue to helping nonprofits by offering each organization 10 free licenses."



THE ACCUFUND CRM SOLUTION

With AccuFund CRM, BeadforLife was able to customize Salesforce.com to automate processes for the Bead Party registrations, including confirmation emails to attendees and thank you emails to hosts.

AccuFund CRM also enables BeadforLife to track donors and activities involved with Bead Parties and other internal programs, create online forms for Bead Party registrations, join mailing lists and download curriculum.

AccuFund CRM also aids the integration of QuickBooks with Salesforce.com for tracking and managing Bead Party and other program revenue. Email marketing program, Vertical Response, is integrated with AccuFund CRM for conducting email campaigns.

Since launching AccuFund CRM with Salesforce.com in 2009, BeadforLife has been able to seamlessly support over 3000 parties in any given year, doubling the amount of

THE ACCUFUND CRM SOLUTION

revenue it generates. Reporting is also much easier, as reports can be pulled up with just the click of a mouse.

"AccuFund CRM has truly revolutionized the way we do business by streamlining processes and making us more efficient," said Ditillo. "We can now get more parties out the door and support more customers. We can manage all our activity in one place and document the work we're doing. At any time, I can quickly pull reports to get information on where we are with Bead Party numbers, curriculum downloads and many other critical business functions."



A STRING OF PRAISE FOR ACCUFUND CRM

"AccuFund is a great company to work with and they have a support staff that always wants to help us improve how we do things," said Ditillo.

"We have forms that are difficult to create, but AccuFund has been really fabulous about working on them with us. They always keep their word as far as wanting to help us overcome any obstacles."



"We're not the typical nonprofit customer and we always present AccuFund CRM with challenges," concluded Ditillo. "AccuFund CRM has helped us build our business and become technologically savvy and we really appreciate them for that."



LEARN MORE ABOUT ACCUFUND

Visit our Website at www.accufund.com, call your local reseller, or contact our Sales Department at 877-872-2228. We would be pleased to discuss this case study, explain the benefits of AccuFund for your fiscal department, and put you in touch with a local reseller certified to install and support the AccuFund Accounting Suite.

AccuFund CRM optimizes and customizes Salesforce into a donor database that meets the unique needs of an organization; improving development, management and fundraising activities.

For information about customizing your Salesforce solution, contact Sarah Finley at sarahf@accufund.com.