

Salesforce's Robustness Improves Communication Practices for Harbor House of Appleton, WI

THE SITUATION

Before Harbor House Domestic Abuse Programs of Appleton, Wisconsin, decided to move to Salesforce for Nonprofits, they were using Raiser's Edge, a cloud-based fundraising and relationship management solution designed for nonprofits, and QuickBooks, an accounting software program designed

for medium to small-sized businesses, to manage their information.

These systems, however, were not as robust as Harbor House of Appleton, WI needed them to be.

Morgan Kirchenwitz, Marketing and Events Manager at Harbor House of Appleton, WI, says, "With Raiser's Edge, it wasn't as easy to pull information as we would've liked it to have been. The platform looked like it was from the '90s and though they were in the process of moving it to the cloud at the time we still had it, it still lacked the key functionality we wanted."

Every three to four months, Kirchenwitz says, they got a new contact at Raiser's Edge, which put stress on their team. Each time their key point of contact changed, Kirchenwitz and her team would have to jump on an hour-long call to re-explain what their objectives were with Raiser's Edge, how they used it, and who they were.

This was both time-consuming and tedious work they felt unnecessary for a thriving business and technology relationship. Because of these issues and their goals to improve donor management processes, gain access to educational resources for success, and adopt a more user-friendly system, they sought out Salesforce and Ledgeview Partners after being recommended to both solutions by their local peers in the nonprofit sector.

Community networking played a key part in their final decision.



THE SOLUTION

Kirchenwitz, and Kabao Vang, Office Manager at Harbor House of Appleton, WI, shopped around before selecting Salesforce as a team. Neon CRM and Bloomerang were the other top solutions they considered, but Salesforce for Nonprofits pulled ahead for its campaign management abilities, product notability, local reviews, product potential and robustness.

Harbor House of Appleton, WI, carefully considered their options due to the financial review process most nonprofits have to undergo, which, for them, included presenting their budget to a board for approval.

"As we look to grow as an organization, and expand and make processes easier, we want to keep moving things off of paper, and go completely online," Kirchenwitz says. "While we've yet to explore it in full, we see a lot of potential with in-kind giving and volunteer management with Salesforce, for example, which excites us. This product has been tailored for the needs of nonprofits."

Vang says grant availability was also a huge selling point for them in selecting Salesforce for Nonprofits.

Salesforce's Nonprofit Success Pack (NPSP) offers users an out-of-the-box solution for managing relationships, fundraising, programs, reporting, and more. It is fully customizable, and enables organizations to keep track of everything that matters to them in one place.

While Kirchenwitz and Vang admit they wish they had more time to invest in their Salesforce education with resources like Trailhead, they have already begun to train some of their volunteers as Salesforce users and look forward to the future growth of their technological journey with the system.

THE
BENEFITS

Vang and Kirchenwitz agree their consultant experience at Ledgeview to get the job done was “great”.

They say the weekly status updates and task reminders they received were very helpful for them in getting to know the system and ensuring a successful implementation.

“Once we got matched with our consultant, the process was really smooth,” Kirchenwitz says. “Our consultant really helped to decipher things, break things down into small steps to prevent us from being overwhelmed, and did a great job at being flexible, understanding, and patient.”

“If we didn’t understand something, our consultant fully explained it,” Vang says. “They were a great listener!”

“It was a great experience for everyone,” Kirchenwitz says. “Everyone got a lot out of our consultation experiences.”

Ledgeview’s insight and guidance into Salesforce for Nonprofits helped their team feel confident throughout the implementation and customization phases of their project.

“Ledgeview was able to change things on the fly as we worked, which was great,” Vang says.

The admin training that they received from Ledgeview help empower Harbor House as they progressed throughout the project.

Kirchenwitz and Vang speak highly to the intuitiveness, user-friendliness and ease of functionality Salesforce offers their organization.

Vang says Salesforce helps them log donor calls and communicate with each other better. Kirchenwitz echoes the communication aspect has been a quick benefit. As they look to get to know their donors better, they are encouraged that their practices will become easier with Salesforce as they go and make every “thank you” and connection more personalized and richer with each contact for the better of their organization’s mission.

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HARBOR HOUSE

About Harbor House Domestic Abuse Programs of Appleton, WI

In their own words ...

“Harbor House is the singular agency in Outagamie and Calumet Counties committed to the awareness and prevention of domestic abuse. As passionate advocates, we constantly seek to start, drive, and shape the conversation around domestic abuse and the services needed to break the cycle. We do everything in our power to keep individuals and families safe through knowledge and connection.”

Mission | to empower communities to be free from domestic abuse through safety, knowledge, and engagement.

Vision | a community without domestic violence

Learn more about Harbor House Domestic Abuse Programs of Appleton, Wisconsin, at <https://www.harborhousewi.org/>.