

donorperfect online

CLIENT PROFILE

The Salvation Army Enhanced their Mission with One Integrated Database.

AT A GLANCE:

Organization:

The Salvation Army –
Texas Division

Business Challenge:

Separate non-integrated databases and paper records inhibited fundraising efforts, data security, reporting and analysis.

Solution:

DonorPerfect Online Enterprise solution from SofterWare.

Key Results:

- Multiple databases and paper records consolidated into a single integrated, central database
- Hosted solution is allowing the entire organization to have secure anywhere, anytime access to consistent and update-to-date constituent information
- Executives are able to make better-informed decisions with more accurate histories, improved financial data, and a truer understanding of their financial position
- Improved ability to speak with one voice has enhanced image with stakeholders – donors, executives, board, volunteers and recipients of care

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*Grace Pandithurai
Project Manager*

The Salvation Army is an international organization whose mission is “to Preach the Gospel of Jesus Christ, and to meet human need, in His name, without discrimination.” Grace Pandithurai, Project Manager, implements technology solutions to help meet the goals of their mission in Texas.

Business Challenge:

With over 300,000 donor records stored in several different programs and physically stuffed into filing cabinets, Grace knew they had a data management problem. “In addition to the hard copy records, we had multiple databases, one for direct mail, one for planned giving, major gifts and others. Many of these databases were home grown. This process was extremely inefficient, and we were not being good stewards of the donor’s information. They make a precious commitment

to donate, and we must respect their data, time and resources they commit to us. We were looking for an integrated fundraising tool.”

Solution:

The solution they were looking for had to meet several criteria. “It had to be user friendly, so it’s easy to train users.

If people think it’s hard to use, they’ll put it on the back shelf and stick to what they’re comfortable with. It also had to be easy to pull reports for analysis, and these reports had to extract the specific, sometimes unique, information we require. The solution had to be web-based, since

we have staff across the state of Texas that needs access to the most up-to-date data. Lastly, we needed something that was secure to allow for the best stewardship of financial data. This was a major concern.”



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Finding the ideal solution involved a long search with many vendors invited to submit Request for Proposals. “We narrowed it down to 5 vendors, but DonorPerfect Online stood out from the rest. We chose it for several reasons. First, it’s so user friendly – our staff members got up and running with it right away. Additionally, it used a centralized database that allowed us to track the necessary information we needed for each aspect of our fundraising efforts. And, since DonorPerfect Online is web-based, our need to have real time access to information from anywhere was met. We also liked the security measures, both at the network and user level, which ensures the safety of our donor data. The ability to customize so easily, such as adding fields, screens, reports and other data was also very important. Lastly, cost – of course – was a concern. We’re a nonprofit, so we’re watching our pennies, and DonorPerfect Online’s cost was very competitive.”

Results:

Since implementing DonorPerfect Online in April 2006, Grace has been very satisfied that their goals are being met. “For example, take donor John Smith, we now have one integrated donor profile, instead of a John Smith Planned Giving record, and a John Smith Major Gifts record, etc. Plus, working with all electronic records, as opposed to hard copies alone, is amazing. The whole staff can speak with one

voice now, and provide better service to all our stakeholders – donors, executives, the board, volunteers and recipients of care.

They have also come to greatly appreciate DonorPerfect Online’s contact management system and reporting. “The detailed notes, flags, and histories in the contact manager – that anyone with proper security clearance can view – are so helpful. This information can be easily sent to executives for briefings. We also generate better reports – more accurate histories, better financial data, and, as a result, we have a truer understanding of our financial position. Having accurate donor information has really helped us in our goal of being honest and trustworthy.”

As for support, Grace noted, “I really appreciate the level of service I receive from everyone. I’m treated like I’m the only customer. I’m able to call and bounce ideas off of Marc (a SofterWare project manager) about the best way to do things, creating a custom report, how a screen would work best, etc. This has really helped ensure our success. Even the data conversion, which we knew would be difficult due to some bugs in our data, went well. The professional staff did a great job of converting all our data. Overall, DonorPerfect Online has greatly enhanced our ministry, and that’s what this project is all about.”



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