

THE SALVATION ARMY INCREASES DONOR CONVERSION WITH TARGETED FUNDRAISING EFFORTS



Dean Feener
Southern Territory Director
of CRM Systems

EXECUTIVE SUMMARY:

The Salvation Army is an international charitable organization with a worldwide membership of over 1.5 million people. Among their many programs, The Salvation Army focuses on meeting the physical and spiritual needs of the poor, destitute, and hungry by providing disaster relief, thrift stores and charity shops, family tracing services, health services, and youth groups.

Dean Feener, Southern Territory Director of CRM Systems, manages the underlying systems that are used to track and manage people who support The Salvation Army, from donors to foundations. He was tasked to find a way to streamline their internal reporting processes and impact the bottom line of their business with effective dashboards. Dean now says there's no problem within the organization that can't be solved by digging into the data with Sisense.



THE CHALLENGE: TRANSPARENT DATA FOR INCREASED GIVING

Established in 1865, to say The Salvation Army has seen trends in donors and fundraising change is an understatement. Dean says that where people would once send money and trust that the organization was doing what they said they would do with it, today's donors want to actually see that their money is going to good use. He needed to provide internal users the information behind their fundraising, which was nearly impossible.

On top of needing to provide transparent data behind where money was being used, Dean also needed to provide local units in the organization dashboards on how effective their fundraising year to year and across channels was. He was doing this with the limited reports their CRM provided and by pulling data into Excel and manipulating it. However, having to make sure that the data was always up to date and correct proved too difficult and time-consuming.

THE SEARCH IS ON

After automating other processes within the organization, Dean's boss challenged him to find a way to solve the reporting problem. His main requirements were:

- ▶ **Quick and simple** - a vendor that allowed him to easily connect data, create reports, and share with people who needed to see them.
- ▶ **Secure** - a vendor that had high security requirements allowing him to keep donor information private and only share specific information.
- ▶ **Fast time to insight** - a vendor that would show value from their data fast so they wouldn't have another fundraising season without the data to steer them in the right direction.

Originally, Dean was going to sign for more reporting capabilities with their CRM provider but when they told him it would take at least six months before seeing a usable dashboard he chose to do a little more digging to see what else was out there. That's when he found Sisense. After downloading the free trial, he was on the phone with a Sisense contact and within two hours had his first dashboard up and running on The Salvation Army's data.

EASY ADOPTION AND UNLIMITED POSSIBILITIES

After the initial trial, Dean was able to produce a full suite of dashboards within a month and distribute them to all of their local areas in time for fundraising season. The dashboards were a huge hit and after starting with 20 Sisense licenses they quickly scaled to 50, 100, and now have an unlimited license contract.

Adoption across the organization was a breeze and Dean says that now end users will call him requesting new dashboards and tweaks. Usually, he says, by the end of their conversation he is able to send the new reports straight to their inbox. Being able to fine tune dashboards for his end users has made Sisense an indispensable tool, allowing people to see exactly what they need with a few clicks of the mouse.

Sisense has also become an operational tool at The Salvation Army. They send and receive a lot of physical mail from their post boxes and Dean was able to connect Sisense to the management database that tells them when they have received packages. He then created a dashboard for each location to be able to see when they have received activity, need to check, or are late on an expected package or mail donation.

HERO MOMENT

In order to focus their fundraising efforts, The Salvation Army and many other nonprofits create wealth overlays where they combine internal donor data with publicly available information. Dean would previously painstakingly create these in Excel but found that the data quickly went stale.

This year, however, he created a dashboard with filter widgets that allow the fundraising team to go in and drill down into data based on location, potential to give, previous giving history, and other wealth data points. Dean no longer has to worry about the reports going stale because he is able to connect to live data sources that allow users to see the most up to date information. After implementing this dashboard, The Salvation Army's donor conversion rate has increased dramatically due to the ability to focus efforts on people who connect with the organization and have the highest potential to give.

Dean says now whenever a problem arises in the organization there is a running joke that "there will be a dashboard for that soon." And, he adds, there usually is "because A, there will be [a dashboard to fix the challenge]; B, it's easy to do; and C, people will like it when I do."

“ SISENSE IS SO MUCH MORE THAN JUST ANALYTICS AND DASHBOARDS FOR US. IT HAS BECOME AN INDISPENSABLE OPERATIONAL MANAGEMENT TOOL. ”

“ EVERY SINGLE PROBLEM THAT WE GET THESE DAYS, I THINK THERE'S A WAY TO FIND A SISENSE SOLUTION FOR IT. NOT BECAUSE WE'RE UNABLE TO THINK OF OTHER WAYS TO SOLVE IT BUT THERE'S NO OTHER WAY THAT'S AS SIMPLISTIC AND YET COMPLETELY POWERFUL. ”