

Salesforce Implementation for Non-Profit Organization

Client Profile

The client is a non-profit organization dedicated to improving the lives of disadvantaged individuals and families through educational and vocational programs, job readiness and job training, case-managed client services and employment opportunities.

The client's mission is to replace hopelessness with opportunity that opens doors to new lives in order to stabilize families and grow stronger communities.

Business Challenge

The client was using time-consuming manual processes to track donors, grants and foundation donations. In addition, the client was using QuickBooks to document funding coming into the organization. The client was also challenged with incomplete data on funding sources and potential future donors. Directed giving was difficult to verify and track, leading to donor apprehension.

Business Solution

The client was using time-consuming manual processes to track donors, grants and foundation donations. In addition, the client was using QuickBooks to document funding coming into the organization. The non-profit client can now manage opportunities, view funding pipelines and track fundraising activities.



Radix Bay also developed several customizations tailored to the unique needs and vernacular of the non-profit organization. This gives the client the ability to track associations with grants to ensure they comply with the requirements of the donor.

Benefits Delivered

- Unified view and searchable list of donors, grants and donations
- Ability to manage donation cycle from pledge to payment
- Enabled kickoff of first major fundraising campaign
- Initiate proactive outreach with outbound marketing
- Streamline and automate manual processes
- Transparent accountability of directed giving