

# It pays to guide your constituents' journey with your organization.



Canadian Cancer Society  
Société canadienne du cancer

“Heller’s range of experience and ability to work with our internal team was essential to us completing this complex project under a tight deadline.”

Cathy Moore  
Senior Director, Strategic Engagement & Platform Development  
Canadian Cancer Society in Saskatchewan

## The Challenge

The Canadian Cancer Society in Saskatchewan (CCSSK) is a provincial division of a national community-based organization of volunteers whose mission is the eradication of cancer and the enhancement of quality of life of people living with cancer. At the end of 2013, they were faced with several challenges:

- Creating an engagement center that would serve both inbound and outbound calls.
- Fostering better engagement with their constituents around their “Relay For Life” peer-to-peer fundraising event.
- A challenging and short timeframe to achieve their goals.

CCSSK knew that this was a complex set of requirements and timeline, so they wanted to work with someone who had experience with other large nonprofits, as well as be able to work in partnership with their internal teams to take on tasks CCSSK could manage in-house. That’s when they contacted Heller Consulting.

## Understanding the Problem

Heller and CCSSK quickly determined that the hidden key to the problem was understanding how a constituent interacted with CCSSK throughout the year and as part of a “lifecycle” of their events. The solution to these challenges needed to be an integrated system that connected the various aspects of volunteer and constituent engagement into a streamlined and organized set of steps. Each step was part of a constituent’s long-term relationship with the organization and required a different type of message at various times throughout the year.

In order to create a system that could manage this long-term relationship as well as the volunteers and staff involved, it was important to clearly understand and define how a person could be introduced and welcomed into the system, and how their relationship would evolve and grow over time.

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## Creating a Solution

The first step in the process was to step away from “software features” and focus on the specifics of what they wanted to achieve. Heller Consulting first worked with CCSSK to develop a well-defined and strategic Engagement Journey that mapped out recommendations and tactics for better connecting with constituents throughout their experience with the organization.

Peer-to-peer fundraising was one of their first interaction points and a major channel of revenue, so Heller helped define the core audiences they would need to address, and developed an annual engagement pathway to follow for each of those audiences. This document laid the foundational recommendations for improving their marketing, communications and relationship-building efforts to significant audiences like team captains, volunteers and survivors.

Next, Heller helped CCSSK determine the most important aspects of those relationships that would impact a constituent’s engagement. From the constituent’s first introduction, Heller plotted each step of a their journey and defined a two-way experience that would build on the relationship at each stage. Everything from messaging frequency to depth of content was mapped out to make sure the appropriate level of communication was maintained throughout the year. This approach allowed CCSSK to maintain valuable interactive communication with their audience throughout the year instead of only asking for their immediate support for fundraising events.

Heller also demonstrated how all of these planned interaction points could translate directly into CCSSK’s Salesforce system, providing both engagement management and overall performance analysis quickly and easily.

## Putting It In Place

After working through the discovery, planning and documentation of CCSSK’s Engagement Journey, it was clear that creating a system that could combine all the data, communication, and operational processes was going to be complex task, especially under the tight deadline required. Fortunately these were all aspects that Heller has been working with for many years, and they were up to the task.

Heller’s technical and project management teams worked closely with CCSSK’s internal team, creating a specific task list and timeline to follow, clearly defining the checkpoints and milestones required to achieve the organizational goals. Heller also made sure all staff were solidly trained in the new system and processes, and that a full onboarding process was in place to bring new staff and volunteers up to speed quickly.

By leveraging both Heller and CCSSK’s experience and available resources, the project was completed on-time and on budget, allowing CCSSK to start working with the system and interacting with constituents on schedule. By working with Heller closely throughout the project, the CCSSK team has a much deeper understanding and sense of pride and ownership of the system, allowing for easier long-term maintenance and future integrations.

## Immediate Results

**Average Raised Per Participant Was 124% MORE**



**9% MORE Participants Above Fundraising Goal**



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Within a few short weeks, CCSSK had quickly leveraged the full use of their system and processes, and was successfully interacting with their constituents faster and with less manual effort than ever before. They have successfully absorbed the inbound overflow created by the closing of separate call center, and have been able to reach out to their existing constituents to update their information and introduce the new system.

Within two months of launching with Heller's strategic recommendations, and the implementation and training of CCSSK's team with an Early Bird Contest and the new engagement center, CCSSK has seen a 10% increase in participant registrations as well as a 20% increase in donations to the Relay For Life event over the same time last year.

### For More Information

For this project Heller was able to combine their extensive experience and technical skill as well as their deep understanding of the strategic needs of a nonprofit organization to create a sophisticated and effective solution. For more information on this project or others that we have completed, please contact us.

From streamlining and optimizations to full system and strategy implementations, we can help your organization become more efficient and effective at delivering on your mission. Give us a call to discuss your organization's needs, and find out how we can help your team be more effective and efficient at delivering your mission.

## Contact us today.

**510-841-4222 x153**

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Heller's experienced team of nonprofit experts has a clear method for helping help you determine your organization's needs, and then can work with to you to create the right solutions built on proven technology and strategies.

We specialize in software and strategies that are designed to work flexibly with your organization, and we work across full system life cycle:

- CRM (Constituent Relationship Management) Roadmaps and Strategy Planning
- Software Evaluation and Selection
- Business Process Streamlining and Documentation
- Data Migration and Consolidation
- Product Training and End-user Education
- Full and Phased CRM Implementations
- Online, digital and web-based creative
- Campaign and organization-wide strategic and implementation services

Our staff has worked on the front lines of nonprofits around the country, and we understand how communication, fundraising and mission management software is used on a daily basis.

Let us help your organization make the most of your technology investment. Find out more about our team and what we can do for you at:

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