

Advancing their efforts with Salesforce



GORDON COLLEGE

“We needed the ability to customize a solution to our own unique challenges, and Heller was able to meet the challenge with excellent results.”

Rick Houston

Gordon College
Director, Development Information Systems

Located 25 miles north of Boston, Massachusetts, Gordon College is one of the top Christian liberal arts colleges in the United States. They currently host over 1,600 undergraduate students and strive to “stretch the mind, deepen the faith and elevate the contribution that Gordon students and graduates make” to our world.

As a private college it is essential to foster and maintain long-term relationships with students after they graduate and transition into alumni and supporters. This is where the college felt they were struggling, and the development team started considering strategies that would help nurture and grow those relationships while increasing their fundraising capability. It quickly became apparent that more advanced strategies would require additional investment in system capability.

Through their research, they discovered the Salesforce platform and Heller’s many white papers on CRM. It was clear from the beginning that their focus was to implement a solution that would expand their fundraising and major gifts management capability.

Drawing on twenty years’ experience working with Higher Education Advancement departments, the Heller team developed and executed a plan to implement a new advancement tool that would provide Gordon’s Advancement Officers the ability to launch strategies not previously possible, primarily focused around major donors. In addition, Heller’s technical team devised means to share information with both the Student Information System, as well as sophisticated online tools to complete this foundational phase. While expansion is envisioned, the primary goals are in place and the team is already enjoying benefits from this effort.

Maintaining proven processes

Originally founded in 1889, Gordon College has a long history of serving their students, and has embraced technology to help track their progress. Recruitment information, admissions data, and academic progress are all accessible as students move through the institution’s many offerings. They wanted to extend that detailed

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view beyond graduation, and take advantage of the established advancement operations to maintain consistency of processes. Any new component would need to mesh and exchange data with their existing systems.

Developing the solution

By working together through detailed discovery and process mapping sessions, Heller and Gordon's joint project team was able to develop an effective solution to achieve the college's goals.

One of the first benefits was that Salesforce.com enabled the college's gift officers and solicitors to store much more constituent data in the system, eliminating the need for extensive external notes and spreadsheets. Many elements of manual data entry were also eliminated, saving hours of effort by college staff. All this data is now available on desktops and any mobile device, enabling office and on-the-go accessibility required for more effective in person interactions.

The flexibility of the Salesforce platform allowed the Heller team to integrate effectively with the established business processes and systems that the college depended on. To monitor scholarships programs, Heller added in custom objects to track

each scholarship from both the recipient and contributor perspective, as well as the progress of groups of recipients. Customized in-depth profiles for each constituent were also developed with advanced summary giving histories displaying specific aspects of their most current information along with additional relationships and connections across the system.

Through the customization, the project team took the opportunity to streamline the operations that had become out-of-date, taking advantage of new system possibilities without losing the goals and outcomes of the established procedures. Heller will continue to work with Gordon College to develop several data sharing methods that will enable seamless transfer of giving data between Salesforce.com and Gordon College's finance and online giving systems.

Today's results and next steps forward

With a customized system built on the flexibility of an integrated CRM platform, Gordon College is now able to get deep insights on their alumni and supporters. They are able to continue interacting with alumni long after they leave the institution and create effective communication and fundraising programs tailored to each graduate's interests and history.

Through the discovery, implementation, and customization process, Heller was able to help Gordon College staff understand the deep foundations of Salesforce.com, and teach them how to manage and maintain their system.

They are now able to control the quality of their data, evaluate additional extensions of their system, and understand both the integration impact as well as the time and effort any system additions would entail. The Gordon College team is currently working with their new capabilities and considering which of the many tools and features available in the AppExchange could apply to their future needs.

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For more information

For this project Heller was able to combine their extensive Higher Education Advancement experience and technical skill to create a sophisticated and effective solution. For more information on this project or others that we have completed, please contact us.

From strategic planning to system optimization and implementation, we can help your institution provide the best experience for your students and alumni, and help you establish and nurture long-term rewarding relationships. Give us a call to discuss your needs.

Contact us today.

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

We specialize in strategies and technology that are designed to integrate with your processes and goals, and we work across full system life cycle:

- CRM (Constituent Relationship Management) Roadmaps and Strategic Planning
- Advanced CRM Technology Implementations
- Software Evaluation and Selection
- Business Process Streamlining and Documentation
- Data Migration and Consolidation
- Product Training and End-user Education
- Marketing and Engagement System Strategic Roadmaps and Planning
- Marketing Automation System Implementation

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 institution 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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