

# Designing a phased plan to increase efficiency and expand capabilities.



“Heller valued our perspective, and combined it with their deep understanding of nonprofit needs and strong methodology to help us develop the right system for our organization.”

**Jennifer Braidwood**

Taking Control Of Your Diabetes  
Vice Executive Director

Founded in 1998, Taking Control of Your Diabetes (TCOYD) is an organization dedicated to empowering people with diabetes to take an active role in managing their disease. They provide education and motivation to help patients take charge of their health with programs focused on understanding and controlling their condition. TCOYD also provides innovative continuing education to medical professionals enabling them to provide the most effective strategies to help their diabetes patients reach their treatment goals.

TCOYD is a unique organization that has developed and expanded their services for patients and caregivers since their inception. They host a range of small and large events each year bringing together both patients and caregivers to learn the latest techniques and strategies in a collaborative environment. The events are successful at improving the relationships and communications skills between patients and providers, but they keep TCOYD's small team frequently away from the office. Over time, managing and organizing these events had become more difficult because most of the data input was done manually, taking up excessive amounts of time. Plus, without a central source of real-time information it was difficult to get a clear, detailed view of their events. They knew there had to be a better way and started to consider how they could leverage new technology options to help.

## Getting started right

The technology options for nonprofits have expanded dramatically in recent years. TCOYD faced a challenge of selecting the right system with the right features that would serve their current needs, and allow for future aspirations. Many organizations get to this decision point and start making lists of features to be able to compare the different options. Working together, Heller and TCOYD decided to take a different approach that we have found to be very successful over the years. The first step was to define the challenges and goals for the organization, clarifying the strategies they currently use and where they would like to grow. TCOYD was already aware of their

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existing struggles and what they wanted to fix. Heller was able to share our knowledge and guidance for best practices and strategies that would improve their existing processes, and provide new strategies that would strengthen their programs. After defining all their current needs and considering possibilities, they decided on specific requirements that they would need in any proposed solution.

First, they wanted to eliminate the many silos of information. Like many organizations, their current processes had evolved over many years and involved manual processes that relied on personal spreadsheets and stacks of paperwork. It was difficult to be sure who had the most recent and accurate information about a particular constituent, and how they were engaged with TCOYD. It was also a challenge to get a report across all phases to evaluate how the process was working. They needed to create one single source of truth that would provide accurate information at any time, and would allow for real-time analysis of constituents through each phase of their system.

The next requirement was they needed to minimize the excessive amount of manual data entry. Inputting and transferring data from person to person was a time consuming task they knew could be streamlined and automated with a central source of data that would be available to all team members.

They also wanted to be able to have a 360° view of their constituents. Their existing system only allowed

very focused views of a single participant at a single event. They needed to be able to easily create reports that would show the participation and engagement over time and across different events. This would provide new insights on how their constituents interacted with the organization that were currently very time consuming to produce.

Finally, since they spent so much time on the road, it was essential that they be able to have complete access from anywhere. They needed to have a solution that would allow them to do each of their tasks from a variety of devices and locations without a hassle.

### A roadmap to a CRM solution

Heller distilled and assembled their requests and requirements to create a detailed CRM roadmap for the organization. The roadmap started with proposing updates to their organization strategy and business processes for more effective interaction between departments. Heller coordinated with TCOYD and multiple vendors to evaluate the various technology options in an organized solution evaluation process. Heller then presented a clear set of CRM technology solutions outlining the benefits and drawbacks of each, and putting TCOYD's highest priorities at the forefront.

The proposed solution took advantage of the flexibility of the Salesforce platform and the Nonprofit Starter Pack (NPSP) package. NPSP would be the consolidated central storehouse of all the constituent data. The tedious and repetitive manual data entry would be replaced by a more effective customized web solution to bring their registrant data from the website directly into NPSP.

To address their email, communication, and marketing needs for the short and long-term, Heller recommended the Salesforce-native marketing automation tool Predictive Response.

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This tool matched well with the way they planned to communicate with both new and existing constituents, and would be able to scale into more advanced strategies in the future.

This combination of tools would allow TCOYD to address their immediate needs, and give them additional capability to expand their fundraising efforts in the future. It would also allow for future plans that include a redesign of their website, as well as building a community portal for all their constituents.

To wrap up the CRM roadmap, Heller provided a detailed implementation and phasing approach that would allow TCOYD to adopt a new system with a minimum of disruption to their schedules. They are currently progressing through the first of the implementation phases that address immediate needs and are looking forward to the expanded capabilities of the system when complete.

### 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 strategic planning to system optimization and implementation, 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.

## Contact us today.

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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 strategies and technology.

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 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 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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