



CASE STUDY

CHALLENGE

Commonwealth Charitable Management wanted to provide donors access to timely, updated, and relevant information about their funds. The organization required a solution that can store donor information, track donations and grants, and regularly update financial information related to fund performance. CCM wanted to have consistent information about donors and be able to easily and efficiently respond to donor requests.

SOLUTION

Agile Cloud Consulting created a process that enables CCM to regularly upload their financial data to Salesforce. This provides a more complete snapshot of a charitable fund in Salesforce. Access to this detailed information allows CCM staff to provide a better customer experience to their donors. ACC configured a form for grant recipients to report on how grant funds are being used. By appending this information to the grant record, the organization is able to present a comprehensive fund portfolio that includes grants and their usage.

RESULTS

Donors can now view details about their fund's performance including information about scholarships and grants that have been awarded from their funds. Donors also have insight to reports that detail how grant funds are being used by the grant recipients. ACC also developed a quarterly Fund Statement which is generated via Conga Composer and then shared with the donor in the Community.



COMMON WEALTH CHARITABLE MANAGEMENT

"Agile understood that we needed to have a better way to communicate with donors. This was done under budget, and Agile was able to offer additional services including the ability to import financial data from external sources and collect grantee reports. I can't express enough how helpful and smooth this process was!"

-Cristine Clayton, Executive Director

ABOUT THE CLIENT

Commonwealth Charitable Management (CCM) is a nonprofit organization that administers charitable funds to benefit a wide range of causes. Donors provide scholarships for students in preK-12th grades, and they also fund grants that address community needs ranging from education to animal welfare.

CCM enables current and generational charitable giving for individuals, families, and businesses in the Endless Mountains region of Northeastern Pennsylvania. CCM helps donors make a difference as they invest in the causes that matter to them.

ABOUT AGILE CLOUD CONSULTING

Agile Cloud Consulting provides end to end salesforce.com implementation services. Our expertise extends beyond technology and into business process and strategic planning for the future. We specialize in for-profit, non-profit, higher education, and healthcare utilizing years of experience and hundreds of successful implementations to help you achieve your organizational goals.