



## **Nonprofit Saves Significant Time by Using Click & Pledge and Salesforce**

Transition from military life to civilian life can be rough—particularly when trying to do it alone. Recognizing this struggle, the staff and volunteers of GallantFew, a nonprofit organization focused on veterans, make every effort to ensure newly transitioned veterans get the help they need. Their mission: to help veterans peacefully and successfully transition from military service to a civilian life filled with hope and purpose.

Through a variety of programs and events, the staff and volunteers of GallantFew work hard to surround newly transitioned veterans with those who can help—creating communities devoted to specific branches of the military, geographical regions, and even career aspirations. By using this strategic approach, GallantFew can establish mentors (“Guides”) who are positioned in the best way to help new veterans (“Future Guides”) cope with the challenges of civilian life. Thousands of Guides and Future Guides, spread across the United States and Europe, maintain meaningful relationships through these communities that contribute to their ability to take positive steps in their lives.

“We work really hard to help veterans find jobs, keep jobs, and build relationships,” says Karl Monger, Executive Director of GallantFew. “The quicker we can engage them after active duty, and the closer we can make a match between a Future Guide and a Guide, the easier their transition will be.”

For veterans, early and constant intervention is of the utmost importance. “A lot of veterans won’t ask for help because they feel like they should be able to ‘suck it up’ and just keep going,” explains Monger. “And the longer they do that, the worse things get.”

### **The Challenge: Incompatible Systems Insufficient for a Growing Nonprofit**

With so much on the line, it is imperative that the staff of GallantFew has the most efficient systems in place so they can keep these veterans fully supported and their programs and events running smoothly. In the earlier years of their establishment, this was a challenge.

Like many new nonprofits, the staff of GallantFew started off using PayPal and Microsoft Excel to manage their donations, volunteer information, and donor data. This wasn’t the most efficient setup, as they often had to enter data multiple times for the same record; because PayPal and Excel don’t work together, GallantFew staff would have to download reports from PayPal and import them into Excel. As they continued to grow, this solution became increasingly less tenable.

Fortunately, in the second year of GallantFew's operations Monger learned about the Salesforce Foundation's program to make Salesforce available for free (or a deep discount) to nonprofits. This seemed like a wonderful solution, and it helped greatly—except for the fact that PayPal didn't quite integrate well with Salesforce. Over time, Monger's struggle to fully integrate Salesforce become a source of frustration—particularly since their database, which is now up to 9,000 names, continued to grow.

### **The Solution: Full Integration of Click & Pledge with Salesforce**

Fortunately, a mutual friend introduced Monger to Dan Woodward, CEO of nonprofit consulting firm Urgensee, for help with getting Salesforce set up and running efficiently. It was Dan who recommended Click & Pledge.

"What they needed was the ability to handle or provide essentially the same feature functionality of six different fundraising platforms all in one," explains Woodward. "Click & Pledge offered a single platform that integrates well with Salesforce. It's both cost-effective and highly efficient."

Woodward was able to not only help GallantFew get Salesforce fully up and running, but he was also able to help them integrate Click & Pledge in order to maximize efficiency for their office processes. His previous experience with Salesforce and Click & Pledge allowed him to find solutions GallantFew didn't even know it needed.

"Dan was really forward-thinking for us," recalls Candyss Bryant, Development Director for GallantFew. "He knew how well Click & Pledge integrated with Salesforce, and how beneficial this integration would be for us in the future. This really helped us maximize our time."

### **The Result: Enormous Time Savings**

For both Bryant and Monger, the time savings with Click & Pledge is one of the most significant benefits of working with the platform. For Monger, the time he saves is particularly evident when it comes to donor acknowledgement. "In the past, I would have to keep all of our donor information in an excel sheet and then spend hours writing thank you letters," he explains. "Now, we get thousands and thousands of donations every year. If we had to go back and do all of these acknowledgements by hand, we'd never have a chance to do anything else."

Bryant agrees. "For each donation that is \$250 and above, we follow up with a personal note," she explains. "If we didn't have the varying steps through Click & Pledge, those personal notes wouldn't be as relevant or strategic for us from a fundraising standpoint."

For Bryant, the time savings is made even more significant by the customizability and automation of Click & Pledge. "Click & Pledge gives us the ability to instantaneously respond to each donation or sale with proper tax documentation as well as our messaging," she explains. "We have been able to strategize and customize it so it is constantly working for us. It is a fundraising platform but it is speaking with our voice."

Thanks to Click & Pledge, Bryant and Monger are able to maintain their data, pull reports, and acknowledge donors in a timely and personal manner—all processes that are crucial for daily operations.

“And the entire process is literally happening while we sleep,” says Bryant. “I can’t even put a value on that—it’s priceless.”