



Starting Off Right: New Nonprofit Launches Successfully with Click & Pledge and Salesforce

Launching a nonprofit organization is a titanic challenge. In addition to finding the necessary resources to support the work of the organization, there are many systems to establish, including payment processing and donor management. Often, the challenges of completing legal paperwork, finding office space, and securing the resources to get started overshadow the work of finding good payment processing and donor management systems.

Yet getting these systems in place early is crucial. If they don't pursue a good system from the beginning, many nonprofit leaders end up with an inefficient setup that gets the basic job done but requires too much employee time to manage. This wastes precious staff and volunteer time that would be better spent doing the hard work that supports their mission.

Joi L. Morris, General Counsel and Senior VP of Alliances of HeritX, wanted to avoid the headaches and inefficiencies of starting off with one system and having to switch further down the road. In the early days of their development, it was critical for HeritX to immediately begin capturing not only payment and donor information but also the important data necessary to cultivate relationships with both its constituents and the scientific community. Click & Pledge and Salesforce helped HeritX prepare for their launch with great success.

Getting It Right from The Beginning

HeritX is the only nonprofit organization solely focused on preventing inherited cancers. Their first project is to prevent cancers caused by the BRCA genes, which cause a significantly increased risk of developing breast, prostate, ovarian, pancreatic, or skin cancer. Focusing research on how mutations in these genes cause cancer and detecting the earliest changes provides the opportunity for interventions that could prevent the development of these cancers. Moreover, preventing BRCA cancers will open the door to the prevention of other inherited cancers and potentially to preventing cancer at large. "We believe that BRCA cancer offers a unique opportunity for cancer prevention," explains Morris. "We are looking for preventative options that leave people healthy and whole."

Of course, doing such important research and advocacy work requires both financial support and building relationships with donors, constituents, and the research community. Tracking these relationships and donations requires software and staff time. Like most nonprofits, they started off tracking things simply using Excel but quickly realized that they

needed a technology solution. Thanks to Morris's law background, the HeritX team was incredibly thorough in their research. "We really took our time," says Morris.

After months of research, the HeritX staff decided it wanted to begin with Salesforce. After interviewing three different Salesforce implementation partners, they decided that Idealist Consulting was in the best position to start HeritX off with success. It was through Idealist that they were introduced to Click & Pledge.

Click & Pledge Donation Forms Help HeritX Launch Successfully

After being hired to help HeritX implement Salesforce, Jo Ann Lewis, Senior Salesforce Consultant with Idealist, suggested Click & Pledge as their solution for payment processing. "HeritX was headed to an historic conference that would be attended by researchers, industry professionals, and potential donors," recalls Lewis. "So they wanted to have a platform ready to collect donations as well as any information relevant to valuable contacts." Lewis recommended Click & Pledge because of the low transaction fees, customizability of the platform, and ease of integration with Salesforce.

"There is a predefined interface between Salesforce and Click & Pledge," Lewis explains. "Because HeritX was able to choose two tools that were already designed to work together, they were able to go to the conference and have the tools in place to capture donations and data."

This kind of early setup was critical to HeritX's initial growth and success. Not only were they able to collect donations and data at the conference, but HeritX was also able to launch a fully functional website by their predetermined deadline.

"It made a huge difference for us as a new nonprofit to have an online presence from the beginning," says Morris. Because they work with a staff of just three people, the ease of Click & Pledge was a tremendous benefit. The standard donation page provided by Click & Pledge allowed HeritX to launch their website and collect donations while they worked on a page that would integrate more aesthetically with their website and collect information unique to their organization. In addition, Click & Pledge's custom question fields allowed HeritX and Idealist to create questions to capture important data. Because they are targeting cancer, HeritX receives a lot of donations that are in memory or honor of someone; the customizability of Click & Pledge allowed them to capture that important information.

The customization and customer service provided by Click & Pledge have garnered enduring loyalty from HeritX. "We have been able to develop and integrate a fully customized and integrated donation page on our website that is simple and elegant," says Morris. "We have also begun to incorporate Click & Pledge's peer-to-peer platform both on our own website and Facebook." When they encountered any issues customizing and integrating these new products, Click & Pledge's daily live support quickly and easily resolved any issues.

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Morris is happy with the effective and efficient integration of Click & Pledge and Salesforce. “It’s incredibly easy how everything just flows from Click & Pledge automatically into Salesforce,” says Morris. “Click & Pledge gives us the ability to not only accept a wide variety of donations online securely, but it also makes the recordkeeping that goes with it completely seamless.”

In addition, Morris feels that having these solutions in place from the beginning has been a tremendous benefit. “We chose Salesforce and Click & Pledge in part because we needed to be efficient. But more important is our ability to build relationships with our donors and track them over time. Salesforce and Click & Pledge offered that to us in a way that no other solution could,” says Morris.

“I think starting with Salesforce and Click & Pledge has saved us a lot of the growing pains my colleagues in other nonprofits have experienced.”