

Case Study: National Children's Bureau

Fundraising, Contact and Membership Management solution based on Salesforce.com

Technology

- Migration to Salesforce.com Non-Profit Success Pack
- Replacement of custom coded bespoke legacy Membership management system
- Real-time integration with website and web shop using Integromat.com
- Batch integration with Mailchimp and Eventbrite

Background

National Children's Bureau (NCB) is a leading charity that for 50 years has been improving the lives of children and young people, especially the most vulnerable.

NCB wanted to replace the current malfunctioning bespoke membership management system, used by four siloed, specialist membership groups, whilst making sure the contact database and management functionality was extended across the entire organisation, consisting of eleven teams.

JADe was the third salesforce implementation partner and managed to bring the project to a successful go-live; whereas the previous two suppliers had failed.

The contact information across the eleven departments were stored in siloed MS Excel sheets on dedicated team shared folders, which did not enable the efficient sharing of contact information among the teams.

Solution

JADe worked closely with the NCB senior management steering group to develop and agree on a plan to replace and improve the current business application setup and on-board the JADe Salesforce Team as the single point of contact for business process support ongoing.

The project was broken down into five core phases:-

1. Analysing NCB business processes and planned improvements
2. Design solution for all NCB teams
3. System development and data migration
4. User Acceptance testing and stabilisation
5. Go-live, user support and training



The legacy membership management system was thoroughly analysed to determine the data necessary for migration to avoid migrating 'dead' contacts while looking for improvement options on the functionality.

The result of the analysis led JADe to design and implement integration of Salesforce with the NCB website and web shop for free and paid-for membership signups, as well as to the integration with Mailchimp for distributing membership benefits to members.

The developed system included a solution for fundraising and evidence reporting.

The project had a strong emphasis on data migration and merging contact information from all sources to form a coherent database for the entire organisation, thereby significantly reducing the effort of maintaining contact information. This was a joint effort of NCB teams and JADe's Salesforce team.

Key benefits

Since launch, every team can now utilise the power of a shared contact database unlike before when the different teams had their own siloed databases. Say a contact attended a training session on child disabilities in a region then this information can be utilised by other teams to send targeted communication on similar publications, memberships or training courses.

NCB internal staff have been freed up from time consuming updating of spreadsheets, allowing them to focus on the core business. Furthermore, costs have been reduced by optimising licence costs and replacing MarketingCloud with the far more cost efficient Mailchimp.com.

Testimonial

NCB had commissioned a version of Salesforce to meet the demanding, highly diverse and complex business that we operate within. NCB is a multi-brand organisation with a wide range of quite distinct stakeholders and customers.

To deliver a system that would meet the breadth of organisational needs, Steve and his colleagues devoted considerable time to understanding the specific needs of our teams and worked with me to devise solutions that would further their objectives. From a project management point of view JADe are very good at framing clearly the implementation tasks that are necessary in order to deliver specific organisational objectives. JADe gained a really strong insight into the National Children's Bureau and were able to respond to the dynamic environment within which the charity operates.



I was very appreciative that JADe presented me with a range of alternative technical solutions to deliver specific business requirements, whether it be to create a direct debit facility for our e-commerce site or to undertake deduplication of data. I was very happy with the quality of the new Webshop that was developed and believe that the automation of so many functions will save time and resources in the charity.

JADe also delivered a high-quality training programme prior to the Go Live of the system, one that generated 85% satisfaction levels from the staff who attended the sessions. This was of fundamental importance given the need to make colleagues feel confident before the Go Live date.

JADe worked to a high standard and ensured that we hit our Go Live date and the system was delivered.

Matthew Sowemimo, NCB

