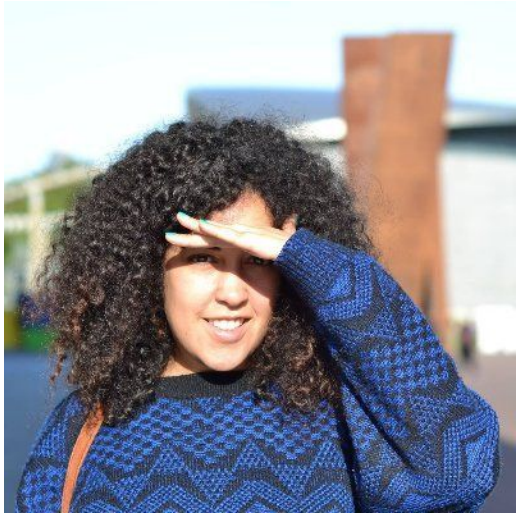
Heather & Tom - War on Want

Improving data processes and optimising digital fundraising with the Engaging Networks Salesforce connector



Improving data processes & optimising digital fundraising with the Salesforce connector

ENCC

Thursday 26th May

Speakers

Tom Barns
Director of Income and Engagement

Heather Getty
Fundraising Officer - Individuals

Introducing War on Want

War on Want is a membership organisation working in the UK, and with partners around the world, **to fight poverty and defend human rights** as part of the movement for global justice.

We amplify our partners' demands

We expose repression and injustice

We mobilise and campaign for change

Our digital mobilisation work

- Digital movement building through paid social and supporter-powered sharing.
- Rapid response campaigns and urgent action opportunities.
- Supporter journeys to grow our base of members and donors.

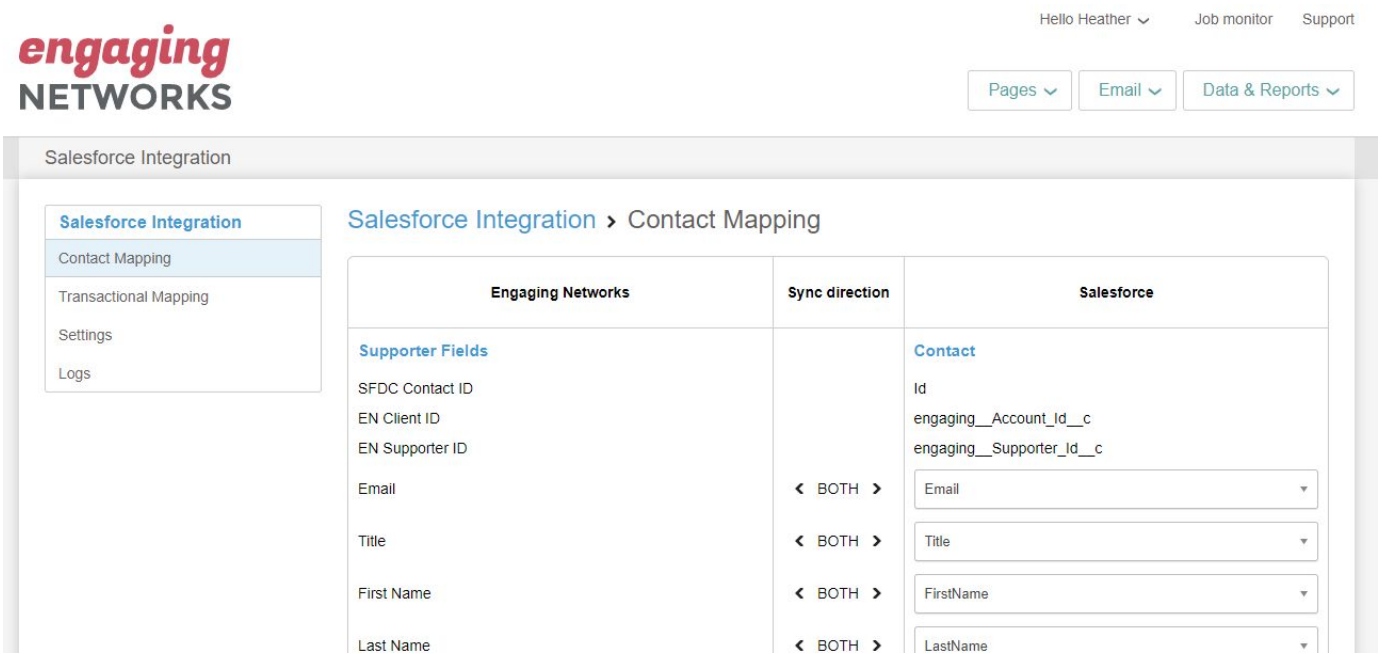
The context...

- Our Raisers Edge 7 database was outdated and completely separate to Engaging Networks.
- We faced the challenge of managing data when running a mix of activities across channels at the same time.
- The team spent lots of time on developing complex processes for manual import-export jobs and reconciliation between systems.

The Solution: EN⇆NPSP

- We made the decision to switch from Raisers Edge 7 to a customised version of Salesforce NPSP.
- The ability to integrate with Engaging Networks was a significant factor in our rationale.
- Our full CRM implementation and data migration was completed between March and July 2021.

Mapping Contacts



Mapping Contacts

1. **Supporter Data Consistency**

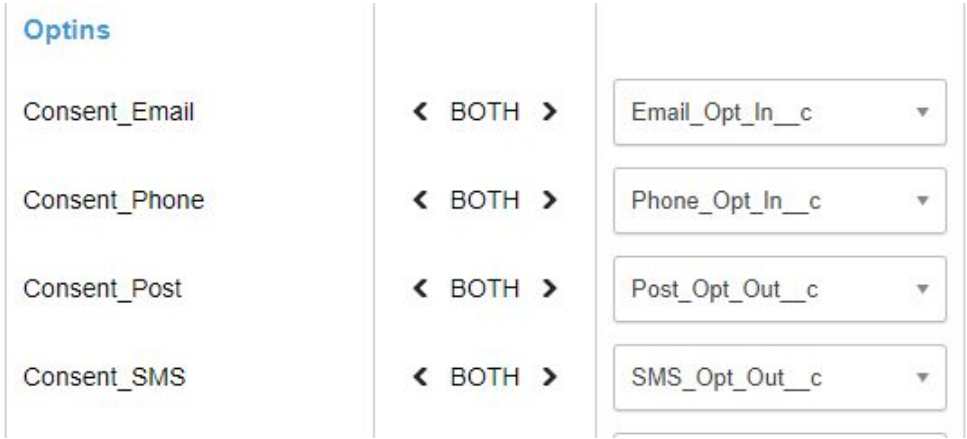
Salesforce Integration › Contact Mapping

Engaging Networks	Sync direction	Salesforce
Supporter Fields		**Contact**
SFDC Contact ID		Id
EN Client ID		engaging__Account_Id__c
EN Supporter ID		engaging__Supporter_Id__c
Email	‹ BOTH ›	Email
Title	‹ BOTH ›	Title
First Name	‹ BOTH ›	FirstName
Last Name	‹ BOTH ›	LastName
Address 1	‹ BOTH ›	engaging__EN_Addres...
City	‹ BOTH ›	MailingCity
County	‹ BOTH ›	MailingState

Mapping Contacts

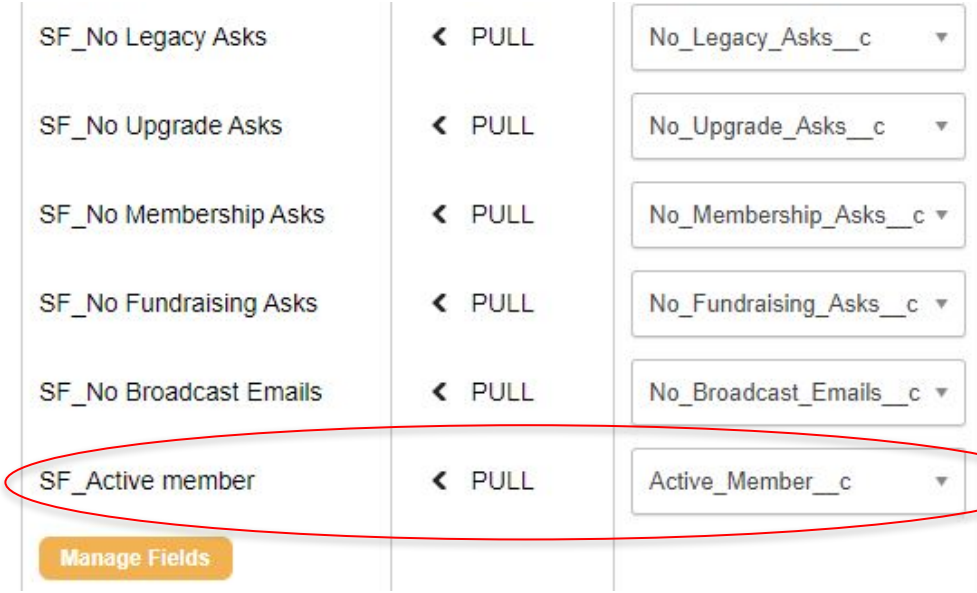
1. Supporter Data Consistency

2. **Consents Mapped in Real Time**

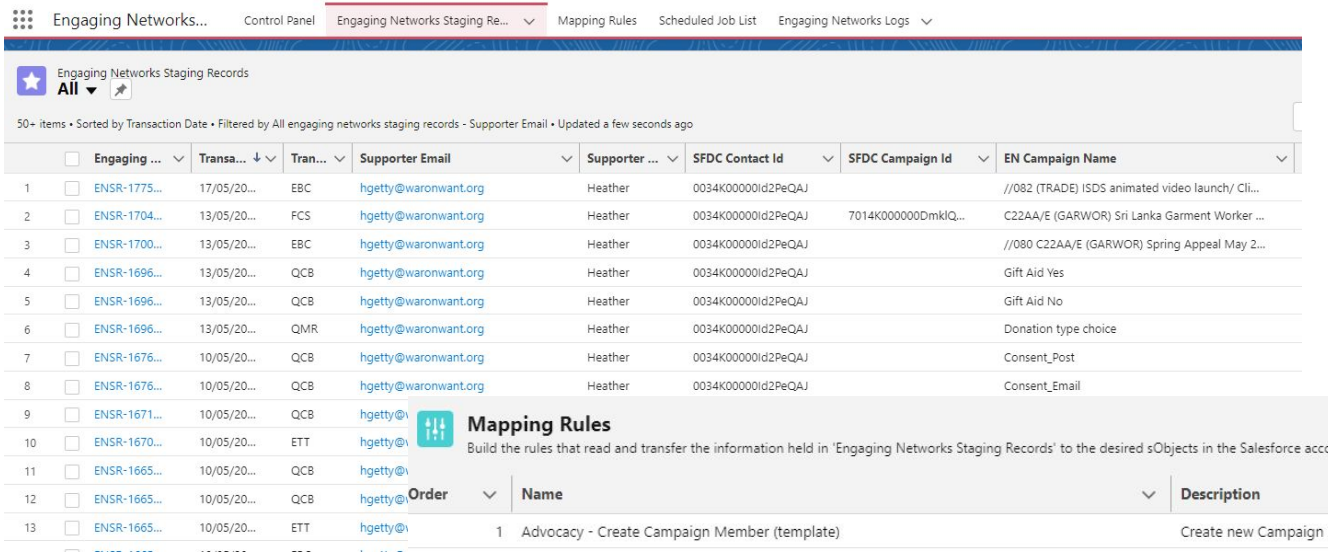


Mapping Contacts

1. Supporter Data Consistency
2. Consents Mapped in Real Time
3. **Increased use of profiles and segmentation**



Transaction Mapping



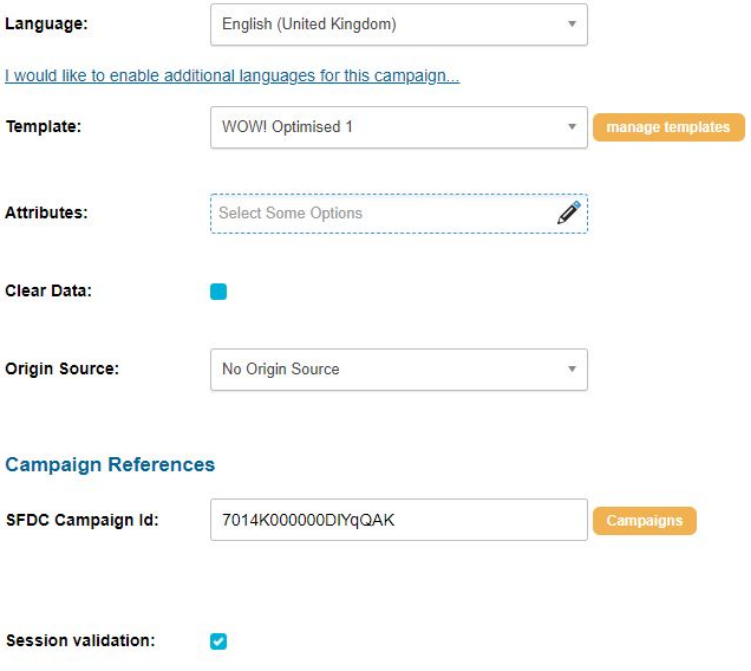
	Engaging ...	Transa...	Tran...	Supporter Email	Supporter ...	SFDC Contact Id	SFDC Campaign Id	EN Campaign Name
1	ENSR-1775...	17/05/20...	EBC	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		//082 (TRADE) ISDS animated video launch/ Cli...
2	ENSR-1704...	13/05/20...	FCS	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ	7014K000000DmkIQ...	C22AA/E (GARWOR) Sri Lanka Garment Worker ...
3	ENSR-1700...	13/05/20...	EBC	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		//080 C22AA/E (GARWOR) Spring Appeal May 2...
4	ENSR-1696...	13/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		Gift Aid Yes
5	ENSR-1696...	13/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		Gift Aid No
6	ENSR-1696...	13/05/20...	QMR	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		Donation type choice
7	ENSR-1676...	10/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		Consent_Post
8	ENSR-1676...	10/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000Id2PeQAJ		Consent_Email
9	ENSR-1671...	10/05/20...	QCB	hgetty@...				
10	ENSR-1670...	10/05/20...	ETT	hgetty@...				
11	ENSR-1665...	10/05/20...	QCB	hgetty@...				
12	ENSR-1665...	10/05/20...	QCB	hgetty@...				
13	ENSR-1665...	10/05/20...	ETT	hgetty@...				

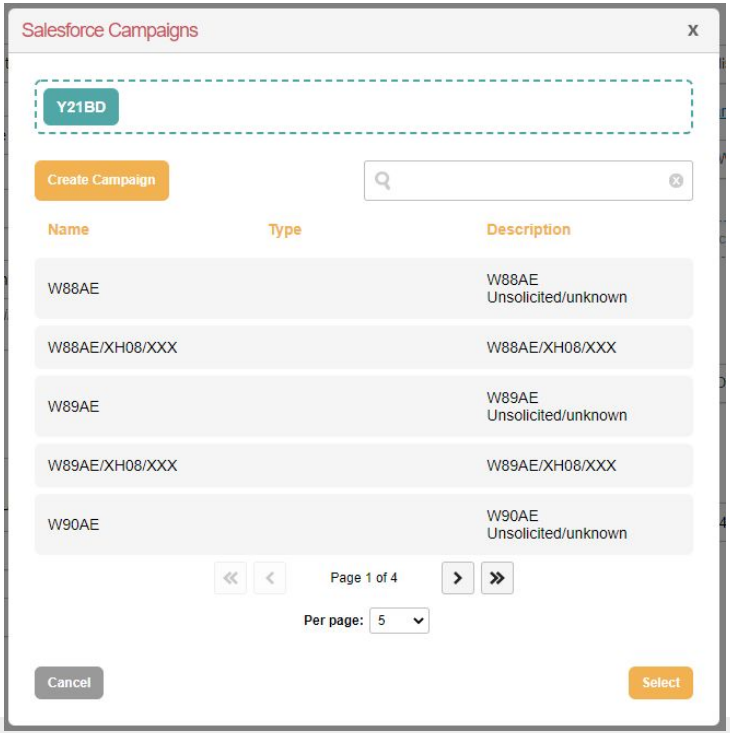
Mapping Rules

Build the rules that read and transfer the information held in 'Engaging Networks Staging Records' to the desired sObjects in the Salesforce account

Order	Name	Description	Active
1	Advocacy - Create Campaign Member (template)	Create new Campaign Member after participating in an advocacy page	✓
2	Gift Aid Declaration Yes	Creates Gift Aid Declaration records and links them to the contact	✓
3	Gift Aid Declaration No	Creates Gift Aid Declaration records and links them to the contact	✓
4	Fundraising Single - Opportunity (template)	Create Opportunity for a single fundraising transaction - FCS/FBS	✓
5	Advocacy - Update Existing Campaign Member (template)	Update a preexisting Campaign Member after participating in an advocacy page	✓
6	Fundraising Single - Payment (template)	Create Payment for a single fundraising transaction - FCS/FBS	✓
7	Fundraising Recurring - New RD (template)	Create Recurring Donation for a new commitment - FCR/FBR	✓

Transaction Mapping

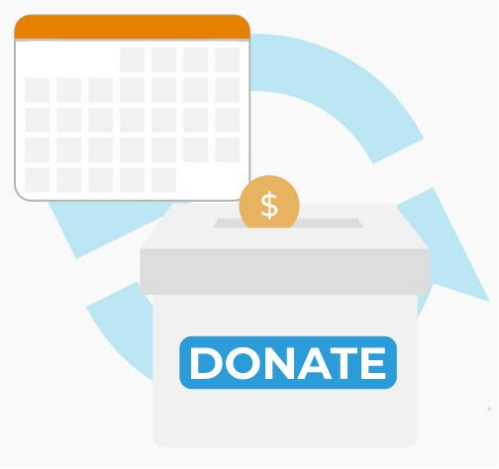




Plans for Future Development

- **The next step - Increased tailoring and personalisation:**
  - Mapping a greater range of fields and data points
  - Building out new profiles and segmentation rules
  - Tailored content and gift prompts to increase income

- **Additional possibilities:**
  - Expanding supporter marketing preferences
  - Mapping supporter behaviour and journeys across offline and online platforms
  - Consolidating reporting by increasing data in Salesforce,such as, UTM tracking
  - Importing clicks/opens data to build out Engagement Scoring and reactivation activity



The benefits

1. We are **saving staff time** that can be put into our campaigns (and deeper data analysis).

2. We are able to **maintain the product without a developer** or dedicated tech support.

3. The real time nature of the integration has enabled us to be **more responsive, targeted and agile in our digital mobilisation** and fundraising.

Thank You.

Any questions?

Heather Getty - Fundraising Officer, Individuals
Tom Barns - Director of Income and Engagement

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waronwant.org