

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



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



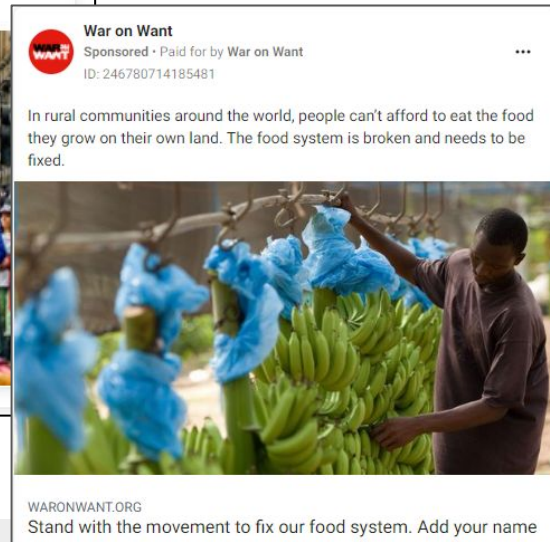
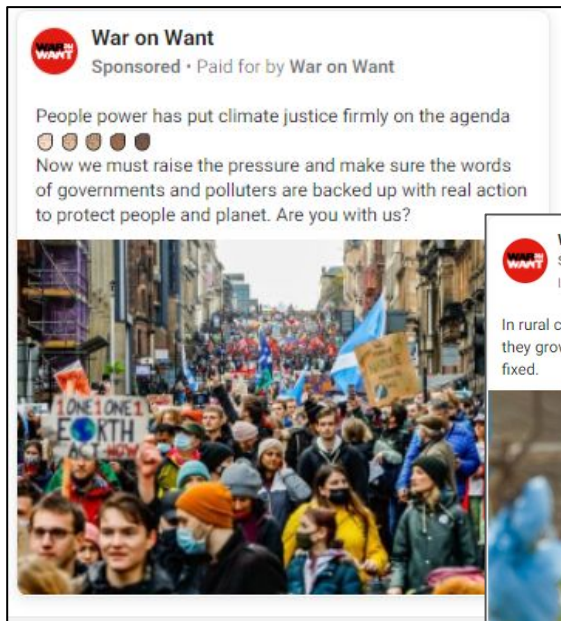
We mobilise and campaign for change



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- Our Raisers Edge 7 database was outdated and completely separate to Engaging Networks.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 \leftrightarrow 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



engaging
NETWORKS

Hello Heather ▾

Job monitor

Support

Pages ▾

Email ▾

Data & Reports ▾

Salesforce Integration

Salesforce Integration

Contact Mapping

Transactional Mapping

Settings

Logs

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 ▾

engaging NETWORKS

ENCC-UK 2022 — 25th & 26th May

#encckuk

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**

Optins		
Consent_Email	< BOTH >	Email_Opt_In__c ▼
Consent_Phone	< BOTH >	Phone_Opt_In__c ▼
Consent_Post	< BOTH >	Post_Opt_Out__c ▼
Consent_SMS	< BOTH >	SMS_Opt_Out__c ▼

Mapping Contacts



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

SF_No Legacy Asks	◀ PULL	No_Legacy_Ask__c ▼
SF_No Upgrade Asks	◀ PULL	No_Upgrade_Ask__c ▼
SF_No Membership Asks	◀ PULL	No_Membership_Ask__c ▼
SF_No Fundraising Asks	◀ PULL	No_Fundraising_Ask__c ▼
SF_No Broadcast Emails	◀ PULL	No_Broadcast_Emails__c ▼
SF_Active member	◀ PULL	Active_Member__c ▼

Manage Fields

Transaction Mapping



Engaging Networks... Control Panel Engaging Networks Staging Re... Mapping Rules Scheduled Job List Engaging Networks Logs

Engaging Networks Staging Records
All

50+ items • Sorted by Transaction Date • Filtered by All engaging networks staging records - Supporter Email • Updated a few seconds ago

	Engaging ...	Transa...	Tran...	Supporter Email	Supporter ...	SFDC Contact Id	SFDC Campaign Id	EN Campaign Name
1	<input type="checkbox"/> ENSR-1775...	17/05/20...	EBC	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		//082 (TRADE) ISDS animated video launch/ Cli...
2	<input type="checkbox"/> ENSR-1704...	13/05/20...	FCS	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ	7014K000000DmklQ...	C22AA/E (GARWOR) Sri Lanka Garment Worker ...
3	<input type="checkbox"/> ENSR-1700...	13/05/20...	EBC	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		//080 C22AA/E (GARWOR) Spring Appeal May 2...
4	<input type="checkbox"/> ENSR-1696...	13/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		Gift Aid Yes
5	<input type="checkbox"/> ENSR-1696...	13/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		Gift Aid No
6	<input type="checkbox"/> ENSR-1696...	13/05/20...	QMR	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		Donation type choice
7	<input type="checkbox"/> ENSR-1676...	10/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		Consent_Post
8	<input type="checkbox"/> ENSR-1676...	10/05/20...	QCB	hgetty@waronwant.org	Heather	0034K00000ld2PeQAJ		Consent_Email



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



Language: English (United Kingdom) ▼

[I would like to enable additional languages for this campaign...](#)

Template: WOW! Optimised 1 manage templates

Attributes: Select Some Options ✎

Clear Data: ☐

Origin Source: No Origin Source ▼

Campaign References

SFDC Campaign Id: 7014K000000DIYqQAK Campaigns

Session validation: ☒

Salesforce Campaigns X

Y21BD

Create Campaign

Name	Type	Description
W88AE		W88AE Unsolicited/unknown
W88AE/XH08/XXX		W88AE/XH08/XXX
W89AE		W89AE Unsolicited/unknown
W89AE/XH08/XXX		W89AE/XH08/XXX
W90AE		W90AE Unsolicited/unknown

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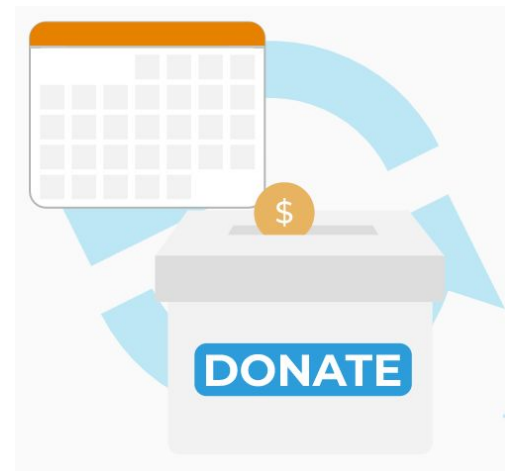
Per page: 5 ▼

Cancel Select

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

support@waronwant.org
waronwant.org

