

# REFERENCE



## JOE ANDRUZZI FOUNDATION



### THE ORGANIZATION

The Joe Andruzzi Foundation ('JAF') is committed to helping families battling cancer by providing grants to alleviate the financial and emotional stress so that grant recipients can focus on their fight against cancer, not the financial distress that comes with it.

### THE CHALLENGE

When JAF chose Salesforce NPSP as its new fundraising CRM, they realized that the standard Salesforce import process involved too many steps, which would lead to significant time spent on administrative tasks. In addition, new gift and contact data would need to be imported into Salesforce in multiple steps, which would be even more time-consuming.

This was time that the team did not have; the idea of putting extra hours and extra steps to an already complicated process added stress and worry about not getting other important work done - like expediting grants to families fighting cancer.

Furthermore, JAF had concerns about ongoing data hygiene and not having key automated data clean-up and error-prevention features that they wanted, such as zip code matching, proper-casing, and searching for duplicates.

The other option, manual entry, would also take time that JAF simply did not have, would also be prone to errors, and could unknowingly create duplicates as well.

Errors, inaccurate data, and duplicates erode the donor experience, and JAF would be seen as sloppy and, by extension, as not good stewards of donated funds. Donor retention would be considerably impacted.

### THE SOLUTION

The Joe Andruzzi Foundation turned to Omatic for a full-scale solution for integrating routine data from external sources into Salesforce NPSP. Omatic deployed its integration and nonprofit dataflow management toolset for Salesforce – and took care of data mapping, helped build automated workflows, and configured the toolset to meet JAF's comprehensive data integration needs: expedient processing time, duplicate matching, proper-casing, and other data hygiene requirements.

### THE RESULTS TO DATE

Omatic's automated workflows have reduced the number of steps and the overall time and effort that it takes to integrate data from external sources to Salesforce. New contact and gift data can be integrated at the same time, along with gifts and payments from existing donors. And, Omatic's experience and expertise ensures that the solution properly matches records, standardizes fields, and prevents duplicates along the way. No sloppy donor data.

The Joe Andruzzi Foundation has found that Omatic's new Salesforce Integration toolset provides needed functionality and data clean-up benefits including streamlining contacts and gifts into a single integration process. And, as a bonus, the integration automatically identifies and creates contacts that are properly linked within households. These automations save time in data review and clean up, in addition to the seamless integration that has otherwise eliminated manual entry and resulting errors.

The JAF team reported that their Salesforce Integration has been an easier, more configurable solution, than they expected, and, so far, has been a big hit across the organization.

This new integration system has helped JAF to rethink their strategies and fundraising targets - now knowing that expedient processing coupled with current, clean, and complete data will support better new-donor acquisition as well as above-average retention.

JAF also has a new perspective on how they integrate data, and how Omatic might be able to help with some other integration needs. Collectively, Omatic and JAF have begun to identify future operational efficiencies and how Omatic's Integration for Salesforce can be leveraged to improve JAF's data integrity long-term.

### ABOUT OMATIC

Powered by Microsoft Azure cloud technology, Omatic's integration and nonprofit dataflow management for Salesforce is the only integration platform built exclusively for nonprofit organizations. It integrates data from any file or system, prevents duplicates using Omatic's advanced matching algorithms, and ensures that all data about your Supporters are centralized and always up to date.