

LIFT USA Drives Nonprofit Growth with Salesforce

LIFT USA, a nonprofit dedicated to helping youth from extremely impoverished families in India, looks to Ledgeview Partners to help them leverage Salesforce to consolidate years of donor data and contact information to start building deeper, stronger relationships with their supporters.

SITUATION

LIFT USA is an independent nonprofit organization based in Chicago, IL. They've partnered with a holistic educational and leadership development program in Tamil Nadu, India that provides highly motivated, underprivileged youth with a supportive home environment, tuition to high-achieving schools, leadership training, and service opportunities. LIFT USA is all about funding opportunities for kids with amazing potential who otherwise wouldn't get the chance to fulfill that potential.

It's a noble mission, and it takes tremendous financial resources to provide support for the 70 students, on average, that LIFT USA sponsors through its partner organization each year. Securing the funding needed to cover the education, leadership development and living costs of these students is the primary responsibility of Katie Heaps, LIFT USA's Director of Development and Stewardship.



Heaps has been with LIFT for about a year. When she first started working there, she was excited to hear that LIFT USA was using Salesforce for CRM. She had worked with CRM systems before, and she knew how valuable CRM can be for building stronger relationships with donors, and for analyzing data quickly and easily through reporting.

Unfortunately, that wasn't the case with LIFT USA's system. Heaps explains, "Our previous implementation of Salesforce was basically a contact list. There was no financial data in the system. That was logged in ten years worth of Excel spreadsheets."

Not an ideal situation. LIFT USA's a small organization, so not being able to access accurate and complete data quickly can really hurt their ability to meet fundraising goals and organizational objectives. Unfortunately, being a small organization, LIFT USA hadn't had the bandwidth to put more time and effort into configuring Salesforce and importing more data. Heaps knew they needed to do something about that, and fast.

SOLUTION

Heaps found the solution to her Salesforce problem when she connected with Ledgeview Partners. See, it just so happens that Ledgeview Partners is staffed by a plethora of CRM experts, and because of that, they were perfectly equipped to help LIFT USA leverage a more complete Salesforce implementation.

Ledgeview Partners worked with LIFT to address a few mission-critical things:

- **Make sure LIFT was using the optimal version of Salesforce** - LIFT USA had Salesforce for several years, but hadn't had the time and resources necessary to configure it for maximum effectiveness. As a result, they weren't taking advantage of improvements and new features. Ledgeview Partners not only optimized the configuration of their system but also identified a version that was specifically designed for nonprofits. Ledgeview Partners implemented the new nonprofit version for LIFT, delivering a streamlined implementation that met all of LIFT's operational needs.
- **Train LIFT how to manage Salesforce** - Ledgeview Partners, as part of updating Salesforce, gave LIFT individualized training on how to manage the system,

and the fundamentals of using the system to manage the foundation's relationships with donors.

- **Equip LIFT to grow its relationships with key donors** - Because of the optimization Ledgeview Partners performed and the training provided, Heaps was able to clear out her old Salesforce database and re-import a clean set of data INCLUDING all of the financial data that had been spread out among years of Excel spreadsheets.

Again, a relatively short list of things. But for a small organization, they were huge steps forward. When the engagement with Ledgeview Partners was complete, LIFT USA finally had a real donor relationship management tool in place, ready to help them learn more about the people who believe in their cause.



BENEFITS

Since working with Ledgeview Partners, LIFT USA's been able to use Salesforce to drive more targeted and data-supported fundraising efforts. For example, the foundation was able to do its first-ever direct mail fundraising campaign recently. Heaps was able to use LIFT USA's new Salesforce database to reach out to one thousand supporters quickly and easily. Prior to the work Ledgeview Partners performed on Salesforce, LIFT USA wouldn't have even attempted to do something like this.

The campaign raised an additional \$7,500. Significantly, the money came from around twenty or thirty donors who hadn't been attending traditional fundraising events. LIFT USA's new Salesforce CRM started contributing to revenue growth right out of the gate. Not too shabby.

Heaps has been taking advantage of the additional reporting that's now at her fingertips too. She's been able to provide LIFT USA's board with more detailed giving reports. She's been focusing on building donor profiles in Salesforce as well, which

helps LIFT USA understand its relationships with key donors to a degree that just wasn't possible before. All of this information is now available instantly, meaning LIFT USA can focus on analyzing its data instead of spending hours pulling it all together from various spreadsheets. Heaps says, **"I feel like I've done something for the organization. Now we have an actual donor management tool. It helps take us to the next level professionally, and that just makes me feel good."**

LIFT USA has an ongoing support arrangement with Ledgeview Partners to make sure they continue to leverage Salesforce to meet their fundraising goals. When it comes to working with Ledgeview Partners, Heaps comments, **"Everyone was very responsive, and they were friendly and easy to work with. We got everything we wanted, and the process went smoothly. I'd recommend them."**

The feeling's mutual! If you'd like to learn more about LIFT USA, or to donate, visit their website today.



lift-foundation.org/donate



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