



Enhancing Stakeholder Engagement with Salesforce Solutions

THE CHALLENGE

Catholic Charities of St. Paul and Minneapolis is dedicated to serving those most in need and advocates for justice in the community. Their programs and services impact more than 20,000 people annually. In order to continue serving their community, they needed a solution that helped them connect and share their impact with supporters. Their main issues were:

- The existing CRM no longer met their needs. It was difficult to use which forced them to create workarounds and manual processes
- Point solutions and additional tools were introduced to fill gaps where their CRM couldn't, resulting in several siloed solutions that did not work together
- They were reliant on contracted support to ensure systems operated efficiently
- The Development Operations team was spending copious amounts of time on administrative tasks and manual data entry.

THE SOLUTION

Redpath worked with Catholic Charities to create a comprehensive CRM for development, advocacy, engagement, and volunteer relations.

- Optimized processes for business functions from development through accounting
- Deployed new CRM capabilities to improve donor relations and donation management
- Created a constituent-centered solution for development (major giving, planned giving, operations), advocacy, engagement, and volunteer relations
- Migrated data from their existing CRM (Raiser's Edge) into Salesforce. This made reporting easier and more robust

THE RESULTS

With this new Salesforce-centric solution, Catholic Charities realized many operational benefits.

- Established and streamlined processes across the development team that allows staff to focus on building donor relationships
- Decreased operational and administrative task time
- Created a sustainable solution that allows for integration with other critical functions
- Staff are now able to manage the solution confidently
- Implemented a CRM that manages data intuitively and works well for everyone

YOUR PATH TO SUCCESS

Redpath has proven success methodologies to help your Nonprofit team evaluate digital strategies to transform Strategic Initiatives, Organization Development, Fund Raising, Program Delivery and Volunteer Management. Reach out to us and we can discuss your best path to success.

"Our experience with Redpath has been nothing short of fabulous! The expertise of the team, coupled with their approachable style made them a perfect partner for us."

- Hayley Mueller
VP of Development