redpath

Finding your Path to Success

Our Path to Success solutions can help you achieve your vision by leveraging Salesforce technology

Our Path to Success solution has three options to choose from with optional add-on features to fit your business needs:

FEATURE	BASIC	ADVANCED	PREMIUM
Kick-off meeting	✓	✓	✓
Vision & Success metrics session	✓	✓	✓
Discovery Sessions	1-4	5-8	9-12
Future Phase Timeline	✓	✓	✓
Future phase estimate	✓	✓	✓
Solution vision document	✓	✓	✓
Client alignment meetings	✓	✓	✓
Recommendation presentation deck and meeting	✓	✓	✓

PATH TO SUCCESS SOLUTION ADD-ONS

Pick and choose from our add ons to further extend and customize your Path to Success solution

- Business process mapping
- User stories
- Detailed integration design

© Redpath 2023 | www.redpathcg.com

Whether your organization is considering implementing Salesforce, or would like to improve the way you currently think about and use Salesforce, the Path to Success process may be for you.

By taking a people-and-process-first approach, Redpath will work with your organization to:

- *Gain an understanding of your current business processes and technology landscape through discovery sessions and system audits, hearing from team members at all levels*
- *Undergo a gap analysis to create a plan for reaching your future state goals based on your current state realities*
- *Deliver a findings and recommendations presentation, along with a plan for implementation, that allows you to plan for implementation, confidently.*

MEET READING ACROSS AMERICA

Reading Across America (RAA) is a fictional nonprofit organization based off of past Redpath clients and experiences. RAA is located in Denver, CO, and their goal is to address disparities in reading skills among elementary school children growing up in low-income areas
by partnering with schools, families, and other community organizations. They raise money via individual donations, as well as through subscriptions to an online reading tool they created.

Their small but mighty team is not only focused on fundraising, but also creating business and school partnerships, implementing their reading software, and supporting existing users with technical and account questions.

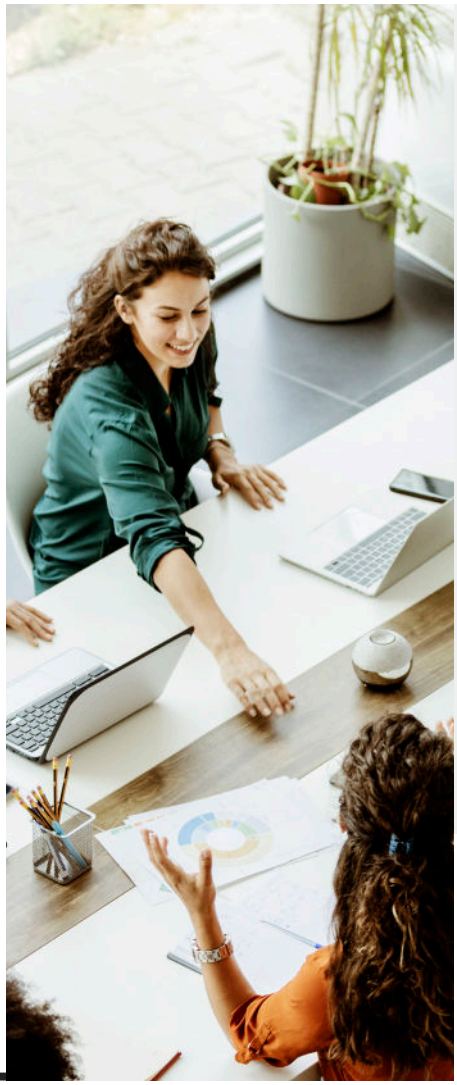
© Redpath 2023 | www.redpathcg.com

Managing complex work with multiple systems

RAA had been using a custom-built, homegrown CRM tool to track all of their constituent information, from donors to tool subscribers to potential partners. They also used over 10 other technology tools in their day-to-day work, including a customer service platform, accounting software, email marketing tool, and more.

Most of these tools were not integrated with the CRM or connected to one another in any way, which led to a number of pain points, including:

- An incomplete understanding of their organization's operations and impact
- A lack of transparency about constituent touchpoints and engagement
- Overspending on duplicative software
- Missed opportunities for growing partnerships
- And more



Finding the path forward

After listening to the needs of the Building Youth team, Redpath and RAA aligned on a plan to utilize Redpath's Scarlet Path to Success offering. In addition, some of the a la carte customizations addressed needs they were looking for, such as a detailed integration design so that their team had a plan for getting all of the information they needed in one cloud based, mobile friendly, and intuitive system: Salesforce.

EXAMPLE ROADMAP RECOMMENDATION

1. Salesforce Migration

- Migrate all contacts, accounts and opportunities from homegrown CRM onto Salesforce
- Fully move customer support process in Salesforce (and retire Zendesk)
- Manual Quickbooks connection (export/import)

2. Quickbooks Integration

- Integrate Quickbooks and Salesforce to allow for automatic data sharing

3. Marketing Automation Tool Implementation

- Replace Mailchimp and Syncapps with Marketing Cloud Account Engagement (Salesforce marketing automation tool) for use across the organization

© Redpath 2023 | www.redpathcg.com

Increased efficiency and reduced cost

RAA completed Phase 1 of the Path to Success roadmap: migrating to Salesforce from their custom-built CRM. Partnering with Redpath, RAA migrated all relevant data into Salesforce, built new automated processes (including a significant overhaul of their customer support process), created new reports and dashboards, and trained staff on how to utilize the new system.

Six months later, RAA has been able to significantly reduce cost through streamlining their technology tools. In particular, RAA was able to completely eliminate the use of their previous customer support tool and instead utilize standard Salesforce functionality to meet their customer support needs in a more cost-effective, efficient way.

RAA has also reduced their customer support ticket resolution time by 15%, and is able to take advantage of more sophisticated revenue forecasting through Salesforce's reports and dashboards.

Switching to Salesforce has allowed RAA to streamline its data management, enhance communication with donors, clients and prospective partners, increase fundraising effectiveness, streamline support operations, and scale its impact on youth across the country.

© Redpath 2023 | www.redpathcg.com

"Redpath was absolutely integral to our project moving out of crisis and into effective change management. We would not have been able to move forward successfully as a team without their assistance. This included a little tough love that we sorely needed to come to terms with our current state...Every Redpath person I engaged with was professional, approachable, and extremely knowledgeable. A++ team and deliverables!!"

PATH TO SUCCESS PROCESS

Your Path to Success

Our team will guide you through voice of the customer interviews, discovery sessions, and system audits to deliver:

CRM vision

We will work with your team to identify your organization's vision and goals for your CRM, and align our recommendations and roadmap to help achieve that vision.

Critical success metrics

Keeping your vision in mind, we will create metrics to help drive the success of the project. These metrics will be referred back to throughout the process to ensure we are keeping the project and CRM aligned to the goal.

Current state summary

Working with all members of the project, we will take historical processes and experiences into consideration as we identify current pain points and areas to keep or enhance. We know every situation is unique and take that into consideration as we work together to find a path forward.

Define your future state

While identifying your current state, we will determine what improvements are necessary and what ideas and priorities you have to help attain your goals. And using our industry expertise, we will provide recommendations on how to move forward.

Recommendations and findings report

Once a future state is defined, we show how you can put it all into action and how we can be a partner to you to make that a reality. A summary of the whole process will be provided at the completion of Path to Success.

At the end of a 6-week Path to Success, your team will receive:

- A recommended Salesforce implementation and/or enhancement roadmap
- An evaluation and recommendation for products or apps to implement (if applicable)
- An estimate and timeline for implementing the recommended roadmap

Need help choosing the right solution for you?

Contact the Redpath team today for more information about our Path to Success solutions to fit your organization's size, needs, and budget.

© Redpath 2023 | www.redpathcg.com