Decryptic Services & Rockwood Community Development Corporation

Splitting Donation & Grant Opportunity Types - Partnership Success

June, 2022

Decryptic Services, LLC

Highlights

- Designed, created, and implemented custom fields and page layouts per record type to maximize employee efficiency and data integrity while tracking information for grants and donations.

- Built custom flows to make the grant and donation processes automated when possible to keep information up to date in multiple places, not just within the opportunity.

- Helped Rockwood clean up a messy and confusing opportunity process to improve transparency and save time within the organization.

Overview

About Rockwood CDC

Rockwood works in Oregon's poorest community to help provide pathways for Rockwood residents to move from poverty to prosperity. They help by helping to build access to and supply of affordable housing and healthcare and by stimulating economic development within the community. As a historically neglected and under-invested community, Rockwood's 40,000 residents have a life expectancy that is 10-years shorter than other parts of the Portland Metro area. They facilitate collaborative solutions with neighbors and local leaders that provide pathways for Rockwood residents to thrive educationally, economically, and relationally.

Challenge: Customizing View Options by Object Record Type

Rockwood was battling an inefficient and disorganized system within their Salesforce instance where their team was tracking Grant and Donation information using the same processes and record types, making it hard and confusing for employees to navigate, leaving room for potential errors.

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Where They Were

When Rockwood employees went to move donations and grants through phases of the opportunity, they were overloaded with stage options that were not relevant to both record types, leaving employees to guess on which stages to move their opportunity through and where to enter pertinent information.

Where They Wanted To Be

Rockwood needed a more streamlined way for their employees to track and organize their donations and grant information within an opportunity in their Salesforce instance.

The Solution
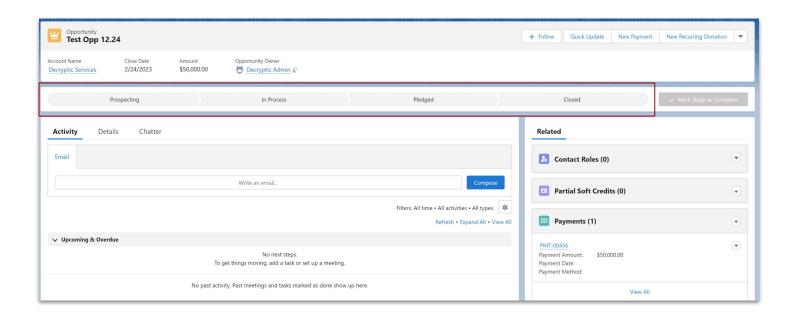
Create a Unique Sales Process for Each Record Type

Decryptic created and implemented a sales process within opportunities for each donation and grant record type that fits their unique workflow and needs.

In order to set up these processes, Decryptic also had to create some of those unique stages for each sales process in the opportunity object and make sure everything was tied to forecasting.
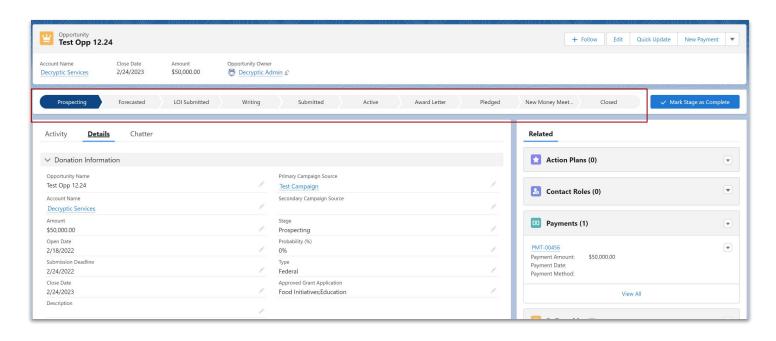
The Solution

For donations, the process flowed from: prospecting > in process > pledge > posted.
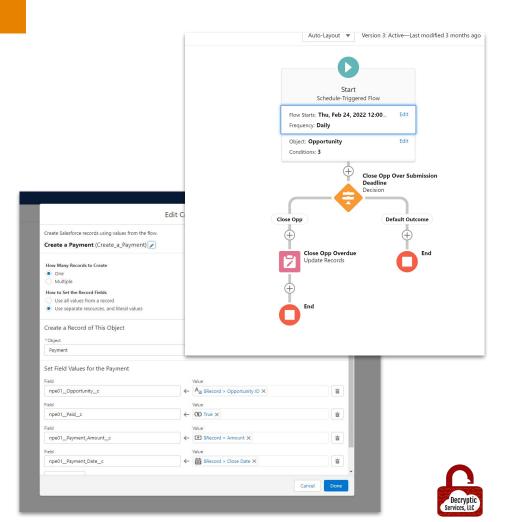
The Solution

For grants, the process flowed from prospecting > forecasted > writing > submitting > active > award letter > pledged > new money meeting > closed won.

The Solution

Build Automation Into the Process

While the new process alone is saving employees time, Decryptic was able to build elements of automation into the process through custom flows, like forecasting and automatically adding grant and donation amounts to the posted payments objects that would simultaneously update financial reports and the organization's budget.

"As a nonprofit, we have very specific ways we use salesforce, but I knew it could go beyond that. Decryptics' discovery processes lead me into broadening our use of salesforce."

— Lynn Ketch, Executive Director

Rockwood Community Development Corporation

The Results

Less Confusion & Fewer Errors

By narrowing down the stage options based on the specific record type (donations vs grants), it became much easier for Rockwood CDC employees to navigate through their Salesforce instance, update record information, and track their grants and donations funding, leading to more consistency, fewer errors, and overall better data integrity.

Improved Transparency

With the implementation of automated flows for payments and financial forecasting, Rockwood is able to more accurately allocate its available funding to programs and events in real-time, allowing them to have financial transparency and grow their reach and support within the Rockwood community.

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About Decryptic Services

With 10 plus years of Salesforce administration experience in the corporate and nonprofit spaces, Decryptic Services is here to help you and your organization identify and overcome persistent roadblocks by leveraging Salesforce solutions and resources.

We specialize in tailoring Salesforce's out-of-the-box solutions to fit the needs of organizations, especially nonprofits. By understanding the unique Grant and Donation processes, Decryptic supports nonprofits in building custom objects, campaigns, automation, and integrations into their instances that help improve operational efficiency. Allowing organizations to focus their efforts on the things that matter, their work in their communities.

Salesforce is a powerful system that can be overwhelming at times, but you're not alone! Let Decryptic Services help you work smarter, not harder in achieving your goals.

Decryptic Services, LLC

Partner with Decryptic

Decryptic Services, LLC

Request a proposal for your next project!

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