

Bassett Healthcare Network: Transitioning from Raiser's Edge Software to the Salesforce Platform

Friends of Bassett Foundation is the philanthropic arm of Bassett Healthcare Network (BHN). On a mission to foster healthy rural communities, BHN provides comprehensive health services in central New York state. BHN's services include five hospitals, urgent and primary care clinics, in-school health centers, and occupational outreach programs to the agricultural industry.

Under new leadership, BHN launched a digital transformation initiative designed to bring in best-in-class technologies for promoting BHN's mission. Goals included elevating the patient experience and improving access to health services in rural areas.

THE PROBLEM:

The Friends of Bassett Foundation had been using Raiser's Edge for nearly two decades. The Development Team was able to make Raiser's Edge work for their needs, but "work-arounds" were identified as a significant cost to fundraising effectiveness and team productivity. The Foundation also sought to identify a donor management technology that would better align with BHN's broader digital transformation initiative.

THE SOLUTION:

The Salesforce for Nonprofits platform was identified as the solution that could meet all of BHN's objectives.

MIGRATING FROM RAISER'S EDGE: A RAPID DEPLOYMENT CHALLENGE

In August 2022 with only four months until the December 15 expiration of their Raiser's Edge contract, the Friends of Bassett Foundation retained iMission to support the transition to a Salesforce platform.

Three overlapping transition projects were identified:

- Migrating decades of donor history from Raiser's Edge to Salesforce donor management CRM
- Extending the Salesforce CRM platform with applications to enhance communications, events management, and major gift officer productivity
- Aligning processes to meet the needs of not only the fundraising team, but the financial team as well

In addition to these objectives, fundraising season was beginning and their new Salesforce platform needed to be able to support year-end gift processing, confirmation letters, and management reports. And, since another major fundraising project was already in the planning stages, the new platform also needed to support the marketing of BHN's Valentine's Day gala. Each of these elements normally requires months of planning to implement alone, but we had just a handful of weeks.



"We undertook the transition from Raiser's Edge to Salesforce with the iMission team supporting us every step of the way. Today, we have cleaner data, better reporting, and integrations with best-in-class applications like Classy, iWave, and Apsona. All this was done in nine months."



Sheila LeMaster
Vice President, Philanthropy,
Bassett Healthcare Network

THE RESULTS:

Salesforce For Nonprofits Up & Running by Mid-November

The initial data migration of active donors was completed by mid-November, a month before the termination of the Raiser's Edge contract. BHN's Gift officers and the Development Options team were trained and supported throughout the transition period in weekly working sessions while the project team continued to build out the Salesforce platform simultaneously.

Industry leading donation apps Classy and Classy Live were integrated with BHN's new NPSP Salesforce instance to support the upcoming Valentine gala and online giving. New time-saving donor management protocols were put into place.

Salesforce Marketing Cloud was launched in support of more robust grateful patient and annual giving campaigns.

BHN's communications were also amplified by installing other applications to streamline the creation of donor thank-you letters and to further cleanse and deduplicate their donor data on an ongoing basis.

Lastly, on the reporting side, Fund Accounting was streamlined, facilitating BHN's regular year-end and month-end reporting, saving the team time and staff resources.

The Ongoing Journey to Digital Transformation

With the first phase of Salesforce implementation now complete, The Friends of Bassett Foundation continues to move forward in its evolution in the use of digital outreach and engagement tools.

- Enhancements to donor Moves Management are being made.
- New donor prospecting campaigns are being launched.
- Digital advocacy efforts promoting rural health equity in New York are on the radar.
- HIPAA compliant integrations with other data sets to better assure personalized donor engagement are underway.

ABOUT IMISSION INSTITUTE

iMission is a full-service New Haven-based marketing and stakeholder engagement agency working exclusively with mission-driven organizations. We are proud to be a leading nonprofit CRM consultant offering expertise in CRM architecture, workflow process solutions, and client training. Our team has deep experience in Salesforce's Nonprofit Success Pack (NPSP), Marketing Cloud, Experience Cloud, Service Cloud, Education Cloud, Marketing Cloud Account Engagement/Pardot, Einstein Artificial Intelligence (AI), data integrity, and dozens of application integrations. We support and grow our clients' capabilities in advocacy, case management, donor management, grants management, community portals, automated communications, and more. Our clients include nonprofit organizations, health systems, school districts, municipalities and social enterprises. Contact us to learn more about how we can assist your organization today!

**Want to learn more about how Salesforce for Nonprofits can benefit your organization?
Contact the iMission team today!**



"With iMission's ongoing support, we're now discovering new ways to use Salesforce to enhance our effectiveness."



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Vice President, Philanthropy,
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