

Marketing Automation & Salesforce NPSP: A Nonprofit Case Study

A Salesforce For Nonprofits Case Study

Each year, Keep America Beautiful (KAB) engages and excites millions of volunteers to clean, green, and beautify their communities. KAB does this through a network of over 700 affiliated organizations as well as corporate partners. Hundreds of Thousands of miles of roadways and acres of public spaces benefit. Community gardens flourish. The banks of streams and rivers are cleaned.

KAB faced the enviable challenge of fielding website inquiries from thousands of people. Requests were coming from people seeking to volunteer and civic leaders seeking to set up a new KAB affiliate. Potential funders and donors seeking information about how they could help were submitting inquiries. Many site visitors also were entering names and emails to download reports, tool kits, and educational materials.

THE CHALLENGE:

A much better process was needed to respond to the inquiring leads. The new process needed to deliver the right responses quickly. The leads needed to be segmented, qualified and, when needed, routed to the right staff member. The system also needed to support the longer-term branding communications that moved people to become volunteers, donors, sponsors, and affiliates.

KAB has been using Salesforce NPSP since 2016. Noah Ullman, a new Chief Marketing Officer at KAB, sought to clean-up and improve leads management. iMission was retained to help KAB meet this challenge.

THE SOLUTION:

A three-phase approach was adopted.

The first phase focused on improving the use of Salesforce's native lead management process. This includes improving the use of the opportunity and campaign objects. Data was cleansed. Processes were defined. Automations, triggers and tasking were created.

The second phase was to extend KAB capabilities by adding marketing automation solutions. The Salesforce Marketing Cloud Account Engagement (MCAE a.k.a. Pardot) solution was selected and implemented. This replaced Mailchimp.



"iMission is our essential partner in the design and implementation of our digital marketing campaigns. From strategic use of market automations solutions to the day-to-day management of search engines, social media and websites, they deliver holistic solutions that drive results."



Noah Ullman
Chief Marketing Officer,
Keep America Beautiful

Implementation extended beyond the use of the synchronized email marketing features. Web tracking was instituted. This new tracking allows KAB to better understand the interests of specific individuals on their site. Prospect scoring was turned on and customized, and lead scoring was activated.

The third phase of the project focused on the development of the campaigns, activations, and calls to action that would deliver measurable benefits. This included development of a strategic stakeholder segmentation framework, website lead form creation through both MCAE and FormAssembly, and lead tagging. Drip email series were quickly developed and implemented via MCAE for key segments. Social media channels were connected to MCAE and tested. GA4, Google's updated analytics tool, was also integrated.

THE RESULTS:

A streamlined process for leads management is in active use. All leads are automatically moved into the digital communications streams, allowing for ongoing, segmented engagement. Based on the segmentation framework, particular leads are automatically routed to different KAB teams. This allows staff members to focus on the leads that require immediate attention. Through MCAE (Pardot), the engagement of each individual is tracked and scored over time. Highly engaged individuals can now be moved to qualified lead status (MQL and SQL)) when the scope changes. These can be routed to the right staff member for personalized follow-up.

A set of monthly Key Performance Indicators (KPIs) also was developed. This provides KAB team members clear insights into what campaigns are working and how their outreach and engagement are driving trends over time.

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!



info@imissioninstitute.org
203-747-8042