

# Transforming Wish Fulfillment: How Make-A-Wish New Jersey Optimized Their Fundraising and Data with Salesforce

## iMission CASE STUDY

Each year, Make-A-Wish Foundation of America (MAW) grants thousands of wishes to critically ill children across the country, enriching their lives and giving them hope and strength in the face of unthinkable challenges. MAW does this amazing work through a network of chapters located across the country and the world. Together with corporate partners and hundreds of thousands of dedicated volunteers, wishes are granted and families are forever changed.

To keep their operations running smoothly and effectively, MAW chapters use a national Salesforce instance to track data on donations, direct mail campaigns, volunteers, and wish granting. The [New Jersey Chapter of MAW](#) was challenged by a need to financially reconcile their incoming donations, combining local chapter efforts with national support and campaigns to get a clear picture of their fundraising and marketing results. Providing reporting to senior leadership about partner contributions, revenue stream performance, and the status of development goals was a complex process that seemed to have no clear path forward.

### THE CHALLENGE:

A more streamlined data process and easy-to-use reporting dashboard were needed to provide transparency and visibility into the Chapter's Development and Operations finances. The new process needed to deliver clean and reliable data, allow access to the data in the federated Salesforce instance, and reconcile the two effectively and correctly. Incoming revenue from direct mail campaigns needed to be segmented and assigned to campaigns, and, when needed, routed to the correct accounts. The system also needed to support a longer-term data cleanliness project that allowed the chapter to move people to become volunteers, donors, sponsors, and wish-grantors.

MAW had been using Salesforce Nonprofit Success Pack (NPSP) for two years. Melissa Salvadore, a new manager of Data & Analytics at MAW New Jersey, sought to clean up their data and improve the team's financial reporting and management. iMission was retained to help MAW New Jersey meet this challenge.



*"Make-A-Wish moved its national and 58 chapters' donor management from Raiser's Edge to Salesforce. Our chapter engaged iMission for direct support, training, reporting, and dashboarding. The folks at iMission accelerated team learning and adoption. Invaluable support!!"*



Rosemarie Farr  
Vice President of  
Development  
Make-A-Wish New Jersey

## **THE SOLUTION:**

The first steps of this solution focused on understanding the complexity of the connections between the New Jersey chapter and the federated national model of MAW's Salesforce's NPSP configuration. Working within the Chapter's accessible administrative functionality, troubleshooting and testing were conducted to understand the most efficient and effective ways for the chapter to track its data through the organization.

This included improving the means and methods of entering data for use across Opportunity and Campaign objects, while eliminating duplicate entries and time-consuming manual staff work. Revenue streams were segmented. Data was cleansed. Processes were defined. Reports were created. Team training needs and task assignments were defined.

The next phase of the project focused on the development of the reporting dashboards, allowing strategic stakeholders to easily view and understand the various incoming financial streams, reconciling revenue to the penny.

## **THE RESULTS:**

A streamlined process for data management is now in active use. Based on the segmentation framework, revenue streams are cleanly tracked and routed to different accounts. This new data flow allows staff members and stakeholders clear visibility into their overall business status and allows the team to focus on the goals that require the most attention.

Team members have been trained on the new processes, and the time saved from hand-processing data is now spent on program-supporting work, allowing the chapter to grant more wishes over time.

A set of monthly Key Performance Indicators (KPIs) was developed and put into place in a custom reporting dashboard. This new dashboard and efficient process provide MAW team members with deeper insights into what campaigns are working and how their outreach and engagement are driving trends over time. Insights also allow the team to pivot when needed.

Overall, the new Salesforce process and reporting have granted the Make-A-Wish team a closer relationship with their national counterpart, improved financial reporting, and a better understanding of their operation's effectiveness.

## **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.

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



**[info@imissioninstitute.org](mailto:info@imissioninstitute.org)**  
**203-747-8042**