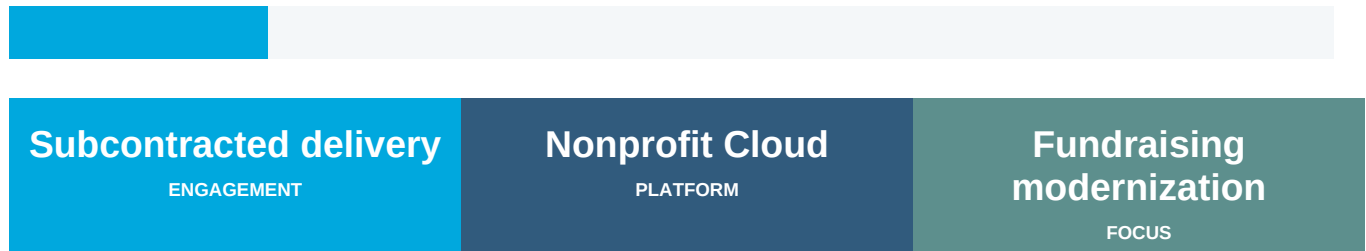




REPRESENTATIVE EXPERIENCE

Regional Nonprofit Healthcare and Hospice Organization

Salesforce Nonprofit Cloud modernization and fundraising operations



Business challenge

A regional nonprofit healthcare and hospice organization needed to modernize and consolidate Salesforce operations across affiliated entities while strengthening fundraising, donor management, reporting, data readiness, and user adoption.

Prudence B2B approach

Prudence B2B leadership supported discovery, solution evaluation, fundraising-process design, data migration planning, testing, training, reporting, and adoption readiness. The work also included architecture for a Salesforce-native batch gift-entry process designed for high-volume operations.

Capabilities delivered

- CRM consolidation planning across multiple affiliated organizations
- Donor, household, gift, recurring gift, tribute, pledge, campaign, and credit-process design
- Acknowledgement, tax receipt, compliance reporting, and donor analytics considerations
- Data migration planning, testing, training, reporting, and adoption readiness
- Batch templates, defaults, validation, duplicate detection, transaction creation, status tracking, and audit history

Business value

- Created a more coherent vision for fundraising operations across the consolidated environment
- Strengthened data, testing, reporting, and adoption readiness
- Designed a scalable approach for high-volume batch gift processing
- Improved auditability and operational visibility

Technology and delivery context

Nonprofit Cloud | Fundraising modernization | Data migration | Custom batch gift entry