

# CASE STUDY

Salesforce Implementation & Integration as well as Business Process Improvement for **AMC**.



# 1 THE PERFECT MATCH

## WHO IS THE APPALACHIAN MOUNTAIN CLUB?

The Appalachian Mountain Club (AMC) is a Boston-based non-profit organization that promotes the protection, enjoyment, and understanding of the mountains, forests, waters, and trails of America's Northeast and Mid-Atlantic regions.

AMC identified the need to replace its current member management and other critical systems to support the organization in its quest to meet their five strategic initiatives outlined in their 2020 Vision. Those initiatives include:

- › Expanding the Size, Breadth, and Strength of the AMC Community
- › Getting Kids Outdoors
- › Leading Regional Conservation Action
- › Realizing the Larger Opportunity in Maine's 100-Mile Wilderness through AMC's Maine Woods Initiative
- › Advancing Excellence in Outdoor Recreation and Leadership Training

AMC approached SilverTech to implement Salesforce.com and integrate the CRM within their current digital ecosystem, but, more importantly, to establish a long-term partnership that could help the organization achieve its 2020 Vision.

## THE CHALLENGE

SilverTech embraced the opportunity to partner with an organization revered for their history and commitment to conservation. And, AMC's desire to use technology to achieve their 2020 Vision made the partnership a perfect fit. The challenge lay in the limitations of AMC's existing donor management and communication and the inefficiencies revealed in their disparate and complicated digital ecosystem. Many business processes remained manual and it was difficult for AMC to truly understand their database of donors, members, and guests. Given the need to get a full 360-degree view of their database and establish a single source of truth, Salesforce.com and the Salesforce Marketing Cloud were identified as viable replacements for their current systems.

## WORK HIGHLIGHTS & DETAILS

Work quickly began to establish Salesforce.com as the hub of AMC's digital ecosystem. The nonprofit Success Pack (NPSP) offered the foundation and open, flexible data architecture needed to integrate with other systems. SilverTech collaborated with multiple development companies to facilitate successful integrations with Marketing Cloud, Maestro Property Management Systems (a custom integration that allows multiple ways to update contacts and display reservation details), Gravity Forms, and WordPress. Several 3rd party apps were identified, developed, and integrated to accelerate time to value, including:

- › Click & Pledge Donor Management
- › CQ Roll Call
- › Declarative Lookup Rollup Summaries
- › Marketing Cloud Connector

More than two million gifts, six hundred thousand contacts, and twenty-five hundred organization accounts were migrated with great care taken to ensure that the data was clean and accurately transferred. But, it was the work on a custom recognition level process that may well be the most impressive feat of the initial build.

In order to achieve their 2020 Vision, namely expanding the size, breadth, and strength of the AMC Community, a full 360-degree view of the journey from website visitor to guest to member to donor is necessary. The custom recognition level process marks an important step in the move to a full view. It facilitates the ability to easily identify donor levels and view, on a year-over-year basis, the trajectory or tiered-history of AMC's members. In service of the 2020 Vision, SilverTech's additional development work to grant a 360-degree view included:

- › Custom rollups to contacts and accounts based on business needs
- › Salesforce campaigns to track all direct mail, email, event, online actions
- › Custom campaign generation process to create monthly direct mail campaigns with over 20 separate segments
- › Report and dashboard creation to track gift efforts
- › Custom membership renewal automation
- › Custom match key identification process to automatically identify contacts when mass uploading gifts
- › Detailed merge documentation for accurate cleanup

# 2 SERVICES

- › Salesforce Implementation
- › Salesforce Integration
- › Business Process Improvement

Since the project's launch in late-2017, SilverTech has continued to partner with AMC to train their internal teams, continue further development and customization of their instance of Salesforce.com, and consult on business process optimization. Already, previously manual processes have been automated and the 360-degree view of constituents that AMC needs to increase sales, memberships, and donations is coming into sharper focus. Though the work continues, this partnership will ensure that AMC achieves its 2020 Vision which in turn will protect the natural beauty of the mountains, forests, waters, and trails of America's Northeast and Mid-Atlantic regions for generations to come.

# 3 RESULTS



# Change the game

