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The trusted Salesforce developer and consultant
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Salesforce Nonprofit Cloud

**Helping a fast-growing nonprofit become
more efficient so it can focus on its mission**

Nana Grants is a fast-growing nonprofit based in Atlanta that pays for childcare so low-income single mothers can finish a degree or professional certification, get good-paying jobs, and become financially independent to build a better future for their families.
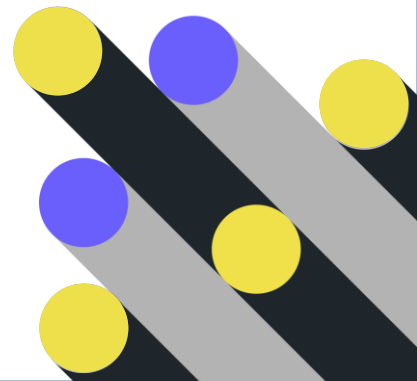
Nana Grants has numerous repetitive and manual business processes and tasks that siphon valuable time that could otherwise be spent on advancing the organization's mission of helping moms and families break the cycle of poverty for good.

The manual tasks include: collecting and reviewing grant applications, gathering attendance records and report cards, remitting payments to daycare providers, logging case management updates, reporting to donors, preparing grant applications, bookkeeping, reconciling accounting data with subledgers, and tracking in-kind donations.

Nana Grants Founder & Executive Director Erica Stephens was spending far too much time on these manual tasks, and using a patchwork of other systems such as Hubspot, Submittable and Excel sheets to collect, organize and share data. She discovered that Salesforce offers 10 complimentary subscriptions to Salesforce Nonprofit Cloud for qualified nonprofits as part of its philanthropic initiatives, but learning how to set up and use the platform seemed overwhelming.

"We had hit a wall with our existing IT platforms and it was holding us back," said Erica. "Salesforce seemed too complicated to learn and configure, and we needed someone with expertise to do the heavy lifting for us. I knew it was the right solution that would let Nana Grants scale and become more efficient so we could spend more time raising funds and serving single mothers."

Nana Grants needed a team of dedicated experts that could properly configure Salesforce Nonprofit Cloud for its exact needs, erase pain points and position the organization for growth.

THE CHALLENGE:
STREAMLINE & AUTOMATE OPERATIONS USING SALESFORCE NONPROFIT CLOUD

Experience Matters: Nana Grants initially engaged an IT development firm to implement Salesforce Nonprofit Cloud for Nana Grants, and it soon became apparent they didn't have the necessary expertise on the Salesforce platform. The project was months behind schedule, and lacked basic functionality. Stephens was introduced to Inovi Solutions, which conducted a diagnostic and discovery session to understand how Nana Grants operated, prioritized its most pressing business needs, and began development.

Inovi's team held weekly meetings with Nana Grants to get the project back on track. Developers also suggested ways to use Salesforce's built-in functionality to optimize key functions, such as replacing free-form text boxes with auto-populated pull-down menus to minimize errors on applications and attendance reports. Within weeks Nana Grants saw improved business operations and fewer mistakes related to payments to daycare providers, reconciliation and reporting.

We automated repetitive and time-consuming tasks and created custom reports that effectively give Erica a couple extra days of productivity each month so she can spend more time on Nana Grants' mission.

Salesforce Nonprofit Cloud also allows Erica to have more meaningful conversations with donors and answer questions related to student demographics, success rates, per-student costs, and other program statistics.

She can use data mining and reporting to quickly compile information for grant applications, and give donors more detailed information about how their money was spent and the impact it's having on families.

Inovi migrated essential Nana Grants business operations onto Salesforce Nonprofit Cloud in just two weeks.

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The digital transformation to Salesforce Nonprofit Cloud has been one of the most impactful changes in the history of Nana Grants.

Tasks that used to consume hours of Erica's time each week can now be done in just minutes. Nana Grants can now gather attendance records and report cards, process applications, manage cases, send letters for tax deductible donations, and monitor its finances more easily.

Migrating to Salesforce Nonprofit Cloud allows Erica to spend more time on fundraising, donor relations, grant applications and partnerships to advance the organization's mission.

More importantly, it positions Nana Grants to scale effectively and efficiently so it can help more single mothers finish their education, get good-paying jobs and gain financial independence.

"Salesforce helped us streamlined our processes, become more efficient and make our dollars stretch further. And we can grow into it as our needs change in the future.

It allows us to scale and show donors that our house is in order and we're responsible stewards of the money they entrust to us."

—Erica Stephens, Executive Director of Nana Grants

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