

CASE STUDY

Revolutionizing Healthcare Operations: A Success Story of Salesforce Implementation



31% Surge in Funds, 3X Increase in Customer Satisfaction

A US-based healthcare organization wanted to improve their operations, donation management and fundraising effectiveness while leveraging their investment in Salesforce. Partnering with InfoVison, the nonprofit was able to streamline their donation process, manage donor relationships, and create successful fundraising campaigns while tracking performance through reporting and analytics. The outcome of this partnership was a remarkable 31% surge in fundraising and a three-fold increase in tracking and customer satisfaction rates.



About the Customer

A global non-profit organization in the United States dedicated to patient support, advocacy, and funding research into breast cancer causes and treatments.



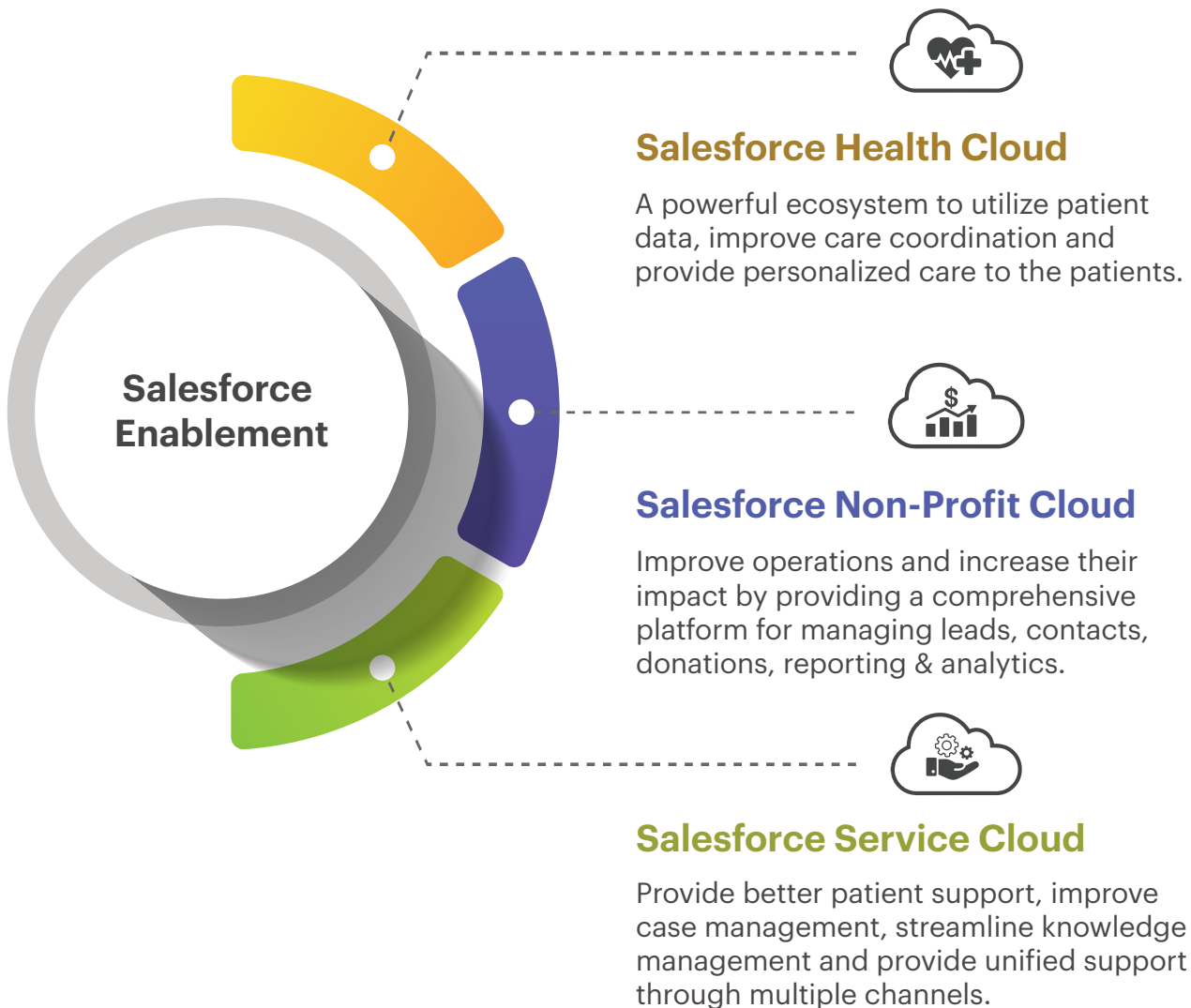
Business Challenge

Despite investing in a robust platform like Salesforce, the Healthcare major struggled with:

- Operational inefficiencies:** A large part of lead management, patient support, volunteer management, fund raising and knowledge management processes were time-consuming, error-prone and inconsistent.
- Lack of visibility:** Due to lack of report and analyzing capabilities, the impact of work could not be assessed.
- Ineffective Communication:** The organization struggled with communication between staff, volunteers, donors and patients resulting in miscommunication, delays in service delivery, and impact on stakeholder experience.
- Missed Opportunities:** Without utilizing Salesforce's capabilities to engage patients, volunteers, and donors, the organization missed out on opportunities to build relationships, raise funds, and improve patient outcomes.

InfoVision's Approach

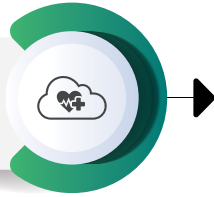
InfoVision employed a three-fold approach to develop a dynamic Salesforce enablement solution. The primary goal was to establish a secure and scalable infrastructure that could provide comprehensive, real-time insights across multiple SF environments. This would enable employees, volunteers, patients, affiliates, and partners to have a unified and seamless experience within a secure environment.





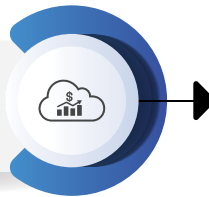
Solution Benefits

SF Health Cloud



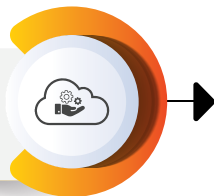
- Patient data management
- Care program management
- Application management
- Automated approvals

Salesforce Non-Profit Cloud



- Donor management
- Campaign management
- Grant management
- Fund raising campaigns

SF Service Cloud



- Agent management
- Patient experience
- Unified support through multiple channels
- Self-service portal for donors, patients & partners

Overall the Salesforce enablement led to improved productivity and automation, while ensuring the secure handling of PII (personally identifiable information) & PHI (protected health information). By utilizing the potential features, the customer improved fundraising effectiveness and maximized their impact.



31%

Growth in Fundraising



3X

Easy to apply and track benefits



16x5

Dedicated Support

If you are keen to optimize and customize your Salesforce platform, write to us at digital@infovision.com | www.infovision.com