



## Objective

A large US Enterprise wanted to streamline their in-kind gift management process. They required expert consultation and implementation services for a unified platform, so they approached Exavalu.

## Challenges

Our client faced several challenges. They lacked a mobile-responsive UI for non-financial donation forms, which resulted in a poor user experience and increased customer bounce rates. To manage both revenue and expenses, their finance team relied heavily on manual processes for financial codes data entry. The absence of a proper channel for volunteers to create an in-kind offer record in their existing system further deepened their challenge.

They did not have a well-defined workflow to track and vet the status of in-kind offers. There was much extraneous non-essential information that hindered interaction with different internal forms.

## How Exavalu Created Value

Exavalu adopted a deeply collaborative and phased approach. We engaged in several discovery workshops with business stakeholders to find inefficiencies within our client's current state process and identified opportunities to automate financial code management using Salesforce CRM. We designed a future state data model that would fit within their existing Salesforce Fundraising Organization by circumventing business and technical constraints.

Our team created prototypes of the future state system within Salesforce to gather early feedback from business stakeholders. We leveraged Salesforce to create customer-facing, in-kind offer forms and built a community portal for volunteer offer submission and management to track volunteers as external users. Using Salesforce list views and customized forms, we also streamlined the offer status tracking and vetting process through Salesforce.

## Benefits

- Streamlined workflow design for offers, form layouts, and essential information capture.
- Reduced the time spent on the offer vetting process.
- Eliminated the non-essential information from forms available on public-facing websites.
- Provided a better user experience for the customers.
- Automated the financial code components' entry.
- Enhanced the user experience for volunteers, in-kind team members, and other business stakeholders.

## Key Highlights

**80%**

**Reduction in manual effort for revenue code entry.**

**35%**

**Decrease in the customer bounce rate for customer-facing forms.**

**20%**

**Decrease in licensing cost compared to the existing solution.**