



NONPROFIT DEEPENS DONOR RELATIONSHIPS WITH CUSTOM SALESFORCE INTEGRATION

Big Brothers Big Sisters of Central Arizona Partners with Mastek, Improves Community Outreach

| BACKGROUND

Big Brothers Big Sisters of Central Arizona is a nonprofit organization dedicated to changing children's lives and helping them build confidence to reach their full potential. The Arizona chapter, which is a part of Big Brothers Big Sisters of America, has served Maricopa, Pinal, and Gila counties for the past 65 years.

Big Brothers Big Sisters of Central Arizona offers a variety of programs and one-on-one mentoring relationships that ignite the power and promise of youth by matching adult volunteers, known as "Bigs," with "Littles," children of ages 5 through adulthood.

| CHALLENGE

Big Brothers Big Sisters of Central Arizona (BBBSAZ) is one of the largest chapters of Big Brothers Big Sisters of America (BBBS), which has chapters in every state. One of the goals of each chapter is to build deep and long-lasting relationships with their adult volunteers. They know that if their Bigs are deeply engaged, participation will increase and the volunteers can be matched with Littles longer, resulting in healthy and rewarding matches.

In 2018, BBBS received a technology grant which provided an opportunity for the entire organization to move to what is internally known as Matchforce, a Salesforce application designed to coordinate and match Bigs and Littles. Each chapter, which operates individually and reports up to the main agency,

utilizes Matchforce in conjunction with its preferred donation system to keep track of donors, donations, and constituents.

The Arizona chapter, which uses Salesforce for its donor management platform, was experiencing critical information gaps as data from Matchforce was not automatically reflected in their local donor Salesforce application. This created a situation where BBBSAZ had limited visibility into what the Bigs in Matchforce were doing and how that corresponded to local initiatives.

BBBSAZ began searching for a solution that would connect and sync Matchforce and its donor database to provide a real-time, 360-degree view of the agency and its volunteer relationships.

"Mastek has been extremely helpful—they just knew everything. It was a great experience, and we appreciate everything they've done to help us achieve our goals."

Andrea Petrof,
Associate Director of Quality Assurance

I SOLUTION/RESULTS

In June of 2020, BBBSAZ partnered with Mastek, a leading Salesforce implementation and automation provider headquartered in Chandler, Arizona.

"We interviewed several companies that specialized in Salesforce, and Mastek was the best choice. They were experienced with implementation and integrations and had worked with large nonprofit organizations like ours in the past," said Thomas (TJ) Shull, Development Manager for BBBSAZ.

I 360-DEGREE VIEW OF DATA PROVIDES VITAL INSIGHTS

BBBSAZ offers a variety of programs such as community-based mentoring where Bigs meet with Littles and explore common interests, such as hiking, cooking, or sporting events. There is also site-based mentoring, where Bigs can meet with Littles during their lunch break or after school and play games, work on homework, or hang out on the playground.

Behind the scenes, there are a multitude of moving parts and data accuracy is essential for keeping up with volunteers, donors, gifts, events, and special campaigns. Real-time data is also critical for BBBSAZ staff to know if a volunteer was "closed out" for a child-safety concern or if there were any red flags.

"We tried creating a manual workaround to connect Matchforce and donor Salesforce, but it was subject to human error, time-consuming, and didn't provide real-time information," said Shull, who manages the donor database. "Each month, I received a report that would contain the latest information about our Bigs and whether they were new or closed. I would then go into the database and manually add or update information."

According to Andrea Petrof, Associate Director of Quality Assurance, it was not only challenging to maintain data quality and accuracy with the manual process, but the lack of data transparency impacted their ability to deepen relationships with volunteers. "If I was speaking with someone on the phone who had just donated, I wouldn't know to thank them because the data hadn't been updated, and this would be a missed opportunity."

Mastek brought everything together by creating an integrated connection between the Matchforce Salesforce instance and the local donor Salesforce instance. "Because data is synced in real-time, we now have clean, reliable information that our entire team can trust," said Shull. "This helps us process gifts, acknowledge donors, run reports, send mailings, and more effectively service events."

"Prior to working with Mastek, these insights were nonexistent," said Petrof. "By having a 360-degree view, we can more easily meet quality standards for our volunteers, children, parents, guardians, donors, and stakeholders throughout the agency."

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Thomas Shull
Development Manager

I AN INSPIRING MODEL FOR OTHER AGENCIES

The Arizona chapter has always been on the forefront of progress, and BBBS, the national organization, sees the new connector as a positive move. "There are many other agencies interested in syncing up Matchforce with their donor database because they're experiencing the same challenges we were," said Shull. "I hope other chapters can model what we've been able to do with Mastek as it will make it easier for them in the future."

Shull and Petrof are excited about the possibilities and were impressed with Mastek's ability to guide them through the process and create a seamless experience. "They made everything easier for us as a whole," explained Shull. "We didn't have the technical expertise or the lingo to communicate our needs to the IT team at our national office, and Mastek provided everything we needed."

“The new automated process also saves valuable time and resources, which means we can dedicate our efforts to higher leverage activities,” concluded Petrof. “Mastek has been extremely helpful— they just knew everything. It was a great experience, and we appreciate everything they’ve done to help us achieve our goals.”



| CHALLENGES

- Manual data entry process
- Information gaps in database
- No real-time knowledge
- Lack of visibility throughout volunteer relationship

| VALUE CREATED

- Real-time documentation
- Clean, reliable data
- Vital insights into volunteer relationship
- 360-degree view of chapter initiatives

| SOLUTIONS

- Real-time Integration
- Data Synchronization

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Thomas Shull
Development Manager

| ABOUT

Mastek is a turnkey & trusted Digital Engineering & Cloud Transformation partner that delivers Innovative Solutions and Business Outcomes for clients in Healthcare & Life Sciences, Retail, Manufacturing, Financial Services, Government/ Public Sector, etc. We enable customer success and business change programs by partnering with enterprises to unlock the power of data, modernize applications to the cloud, and accelerate digital advantage for all stakeholders. Customers Trust Mastek to deliver Business Value with Velocity and we operate in 40+ countries including the UK, Americas, Europe, Middle East, APAC with ~5000 employees. We are in the business of de-complexing Digital and making our clients future-ready with an industry-first approach. For more details, please visit our website www.mastek.com.



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