



AUGUST 7, 2025

# How to Love Your CRM Again



# PRESENTERS



**Paige Deegan**

Account Executive  
Heller Consulting

- Loves helping organizations tackle challenges to let their people shine.
- Former fundraising professional with over 16 years of experience in nonprofit development and communications.



**Emily Finton**

Assistant VP of Philanthropy Ops  
Kennedy Krieger Institute

- Oversees donor services, annual giving, stewardship, and data administration.
- Has spent more than two decades in fundraising.
- Credentialled in CFRE and Blackbaud.



**Jenn Abel**

Director of Donor Services  
Kennedy Krieger Institute

- 10 years experience in donor services & nonprofit healthcare.
- Oversees gift processing, reporting, and fundraising tech.
- Certified in both Raiser's Edge and Salesforce.



## About Kennedy Krieger Institute

- Established in 1937 in Baltimore, Maryland.
- Provides inpatient and outpatient medical care, community services, and school programs for children and young adults with physical and learning disabilities.
- Treats nearly 30,000 patients a year.
- Supported by over 6,000 donors annually. CRM contains approximately 200,000 records with data going back to the 1980s.



## About Heller Consulting

- 29 years of experience, comprising 3,000+ major technology projects for 1,500+ nonprofits.
- Focused on technology strategy, implementation, and change leadership.
- We're a B Corporation dedicated to the nonprofit, healthcare, and education sectors.

# OVERVIEW

LOVE YOUR CRM

- CRM Goals
- Heller's Assessment Methodology
- A Path Forward
- Improvements in Action
- Q&A

Describe the role your  
CRM was playing within  
Philanthropy?



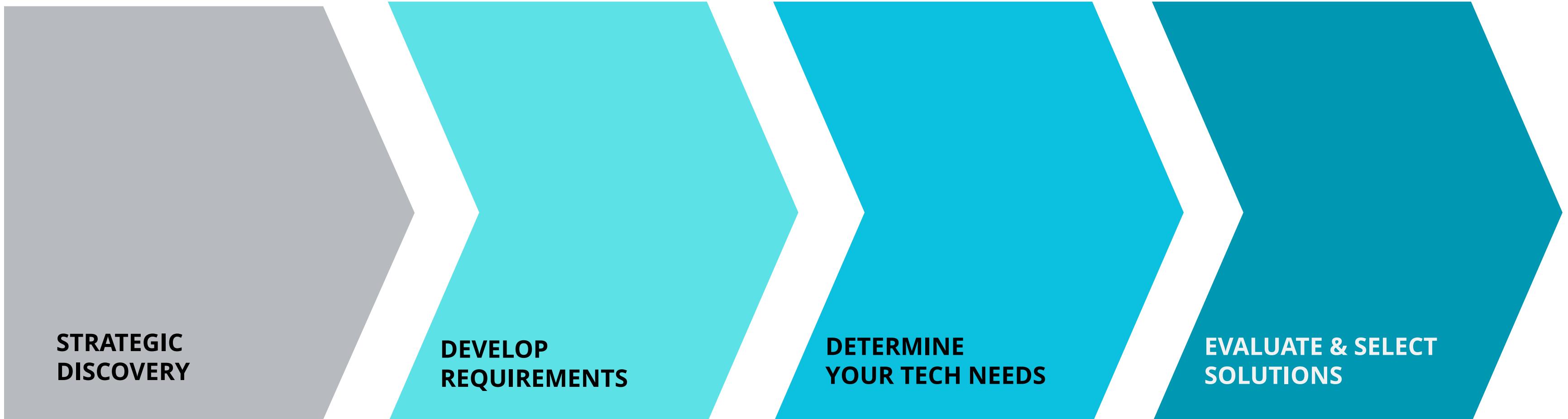
# Why did you decide to take a look at CRM options?



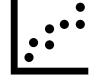
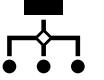
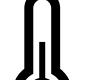
# Let's look at Heller's methodology



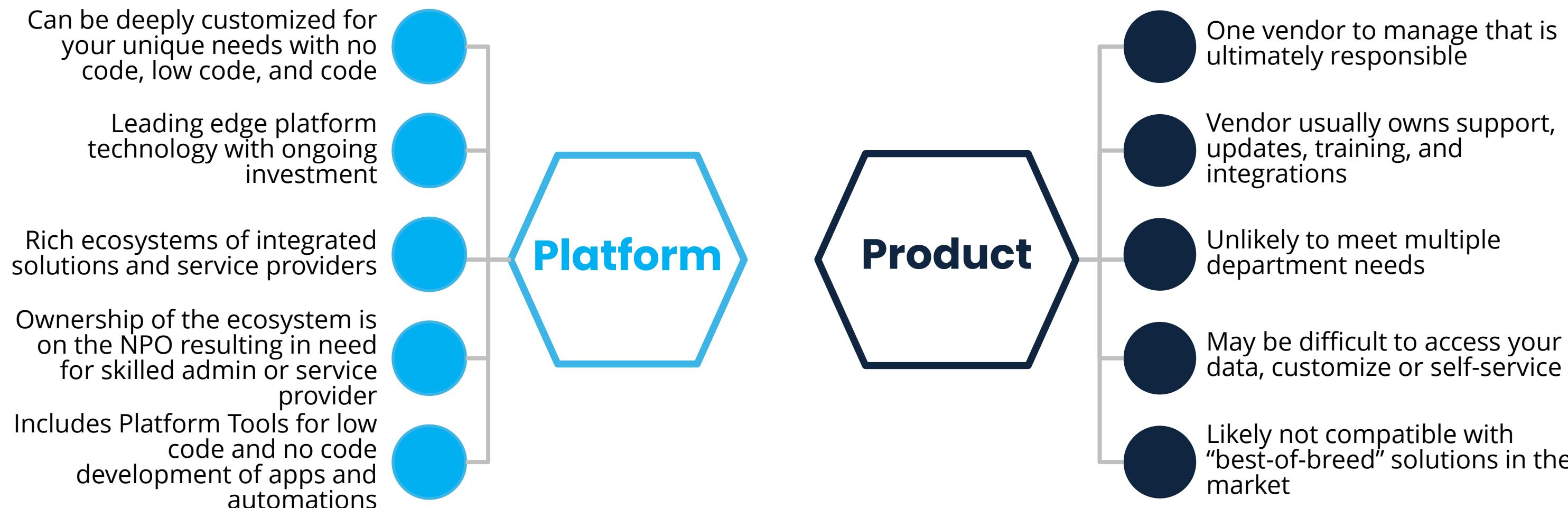
# ASSESSMENT METHODOLOGY



# GOALS: FUTURE-FACING CRM

-  Dashboards and reporting
-  Modern user experience
-  Integration with online fundraising platforms and email marketing tools
-  Growing monthly donors
-  Donor engagement insights
-  Donor retention and segmentation
-  Real-time goal tracking
-  Detailed retention analysis

# CRM APPROACHES





### MOVE TO SALESFORCE NONPROFIT CLOUD

- Enterprise-ready platform that can be customized for org needs. However, this would be a lateral move.
- Marketing team using Salesforce Marketing Cloud and NPSP.
- Tough timing—large team increase in readiness for new strategic plan.



### STAY IN RAISER'S EDGE NXT

- Serving gift officer needs but difficult to pull data from for reporting and insight.
- Data in siloes.

### AND EXTEND REPORTING WITH POWER APPS

- Leverage Microsoft's Power Apps to build reports and dashboards that allow self-service for gift officers and leadership.

# What approach did the Institute decide to take?



## Extending Raiser's Edge with the Microsoft Power Platform

Heller identified several ways Kennedy Krieger could extend the use of Raiser's Edge with Microsoft tools. So far, Heller has supported the organization in the following ways:

- Power Platform Connector Setup
- Data Visualization and Dynamics Reporting
- Omatic Integration for Segmentation
- Training & Support

# IMPROVEMENTS IN ACTION

Raiser's Edge NXT

Search

Kennedy Krieger Institute

Reset

Filters

**Kennedy Krieger**

## Total Fundraising for Gift Officers (Gifts and Opportunities)

Gift Officer: All

Opportunity Asked: \$

Opportunity Funded: \$

Total Gifts: \$

Goal: 20.56%

Opportunity Goal: 2040

**Total Gifts by Campaign**

**Opportunities Asked vs Funded**

**Total Fundraising by Fundraiser**

**Fundraised vs Goal**

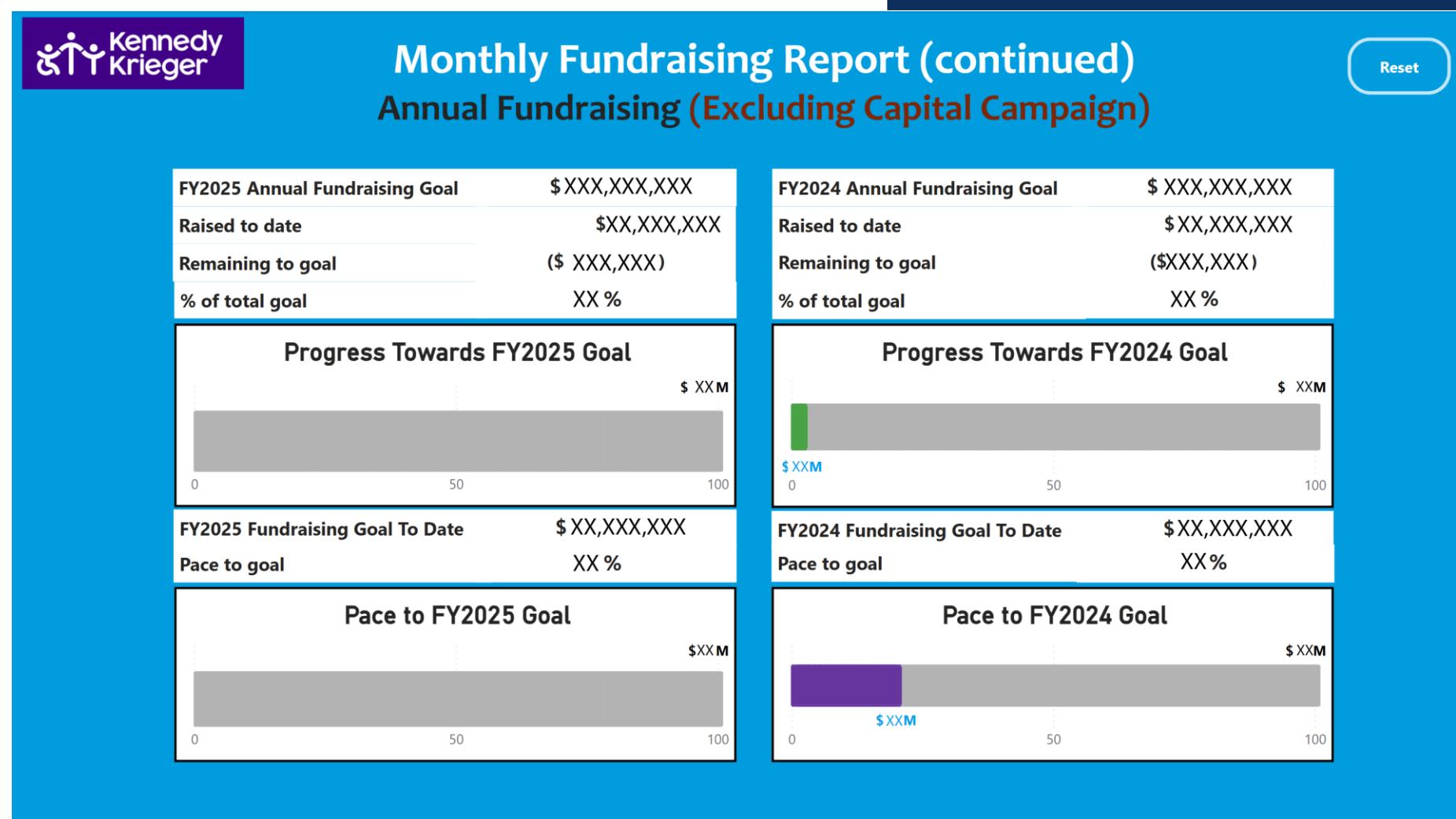
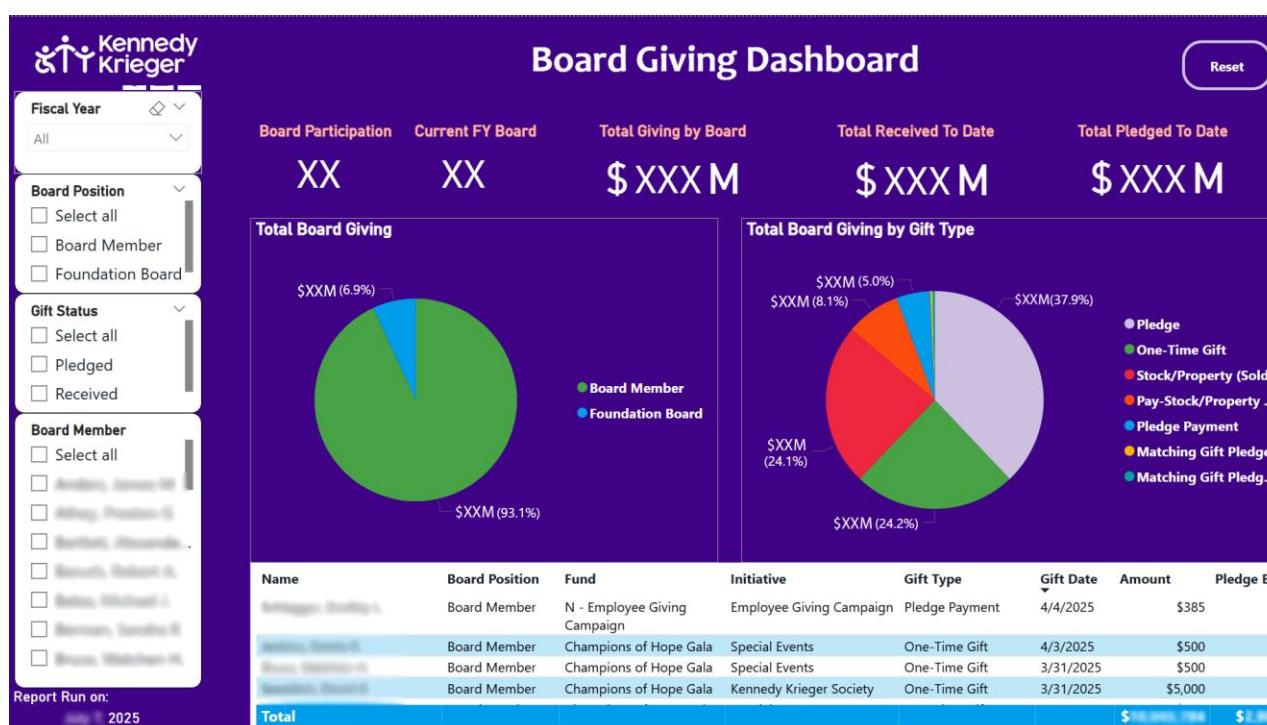
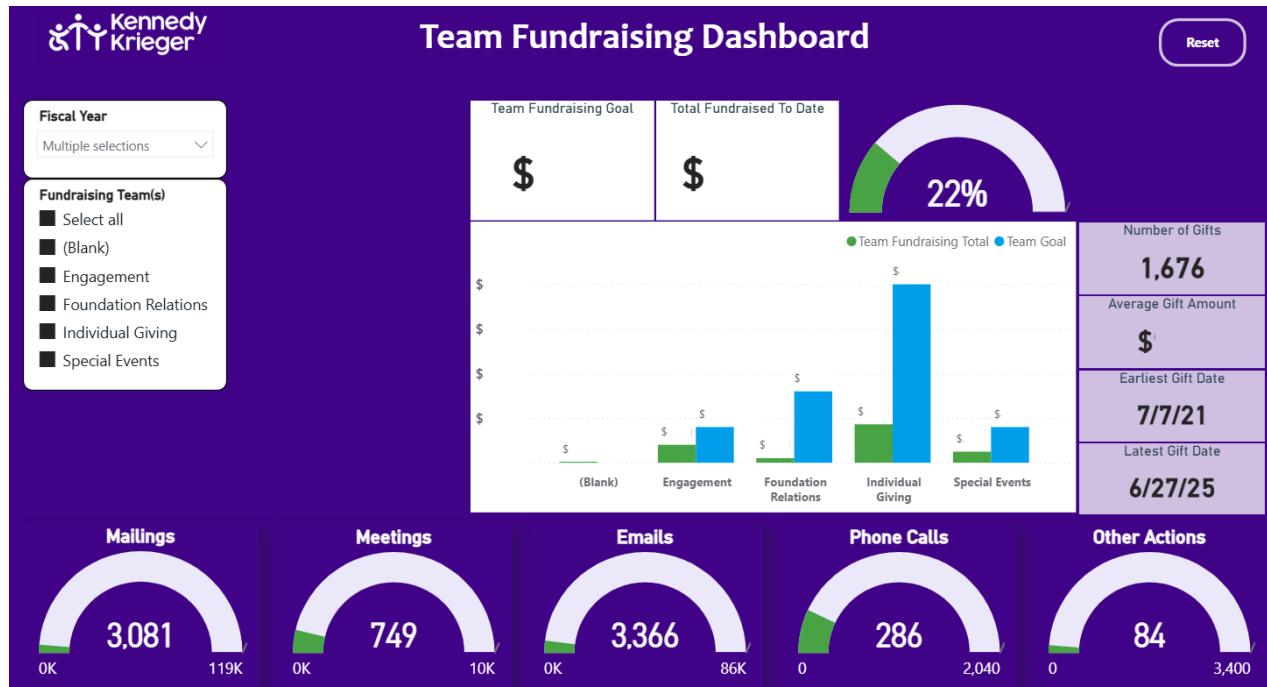
Gift Officer Recent Gifts

Actions Completed by Gift Officers

Opportunities Submitted vs Completed

LOVE YOUR CRM

# IMPROVEMENTS IN ACTION



# IMPROVEMENTS IN ACTION

**Data Queue**

All Formulas   Production Formulas   Sandbox Formulas

**RE Constituents to Salesforce Sandbox - MAIN**

0 Ready records	291 Needs Attention
<a href="#">Review</a>	

**Status**

RE Incoming data Scheduled 7/25 @ 3:00 AM	SF Processing Waiting 0	SF Sending data Finished 29
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[View formula history](#)

**RE Solicit Code & Fundraiser to Salesforce Sandbox**

0 Ready records	178 Needs Attention
<a href="#">Review</a>	

**Status**

RE Incoming data Scheduled 7/24 @ 6:00 PM	SF Processing Waiting 0	SF Sending data Finished 181
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[View formula history](#)

**Production Salesforce to RE - Constituent Updates**

0 Ready records	45 Needs Attention
<a href="#">Review</a>	

**Status**

SF Incoming data Scheduled 7/25 @ 12:29 AM	SF Processing Waiting 0	RE Sending data Finished 1
--------------------------------------------------	-------------------------------	----------------------------------

[View formula history](#)

**RE Event Registrations to SF Sandbox Campaigns**

0 Ready records	0 Needs Attention
<a href="#">Review</a>	

**Status**

RE Incoming data Scheduled 7/25 @ 6:30 AM	SF Processing Waiting 0	SF Sending data Finished 100
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[View formula history](#)

# WHY INVEST IN YOUR CURRENT CRM?

Some orgs see leaving their current CRM as the only option for improving their systems. **This is a false choice** as investment in the current solution can bring many benefits:

- Quicker time to realize improvements
- Lower investment and staff impact
- Can leverage modern technology for targeted use cases
- Continuous Improvement
- Easier adoption
- Option for future change

What advice do you have  
for others you are facing  
challenges with their  
current CRM?



## LOOKING FORWARD

What does the Institute hope to improve as it continues on this journey with their current CRM setup?

Power Platform possibilities:

- Automation of data capture
- Low-code apps embedded in RE NXT
- Improved data accessibility
- Connection to Microsoft Teams

# Q&A



# Thanks! Connect with us.



**Emily Finton**

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