



Nonprofit Simplifies Pledge Management and Increases Efficiency by Using Click & Pledge and Salesforce

Every nonprofit leader knows that recurring donations (or monthly pledges) create the foundation for a strong fundraising program. Unfortunately for some, processing those donations can be a time-consuming task. With Click & Pledge, Cleaning for a Reason found a way to simplify the monthly pledge process, streamline their payment processing system, and integrate all of their data with Salesforce.

Cleaning for a Reason

In 2006, Debbie Sardone, owner of Buckets and Bows cleaning company, took a call from a woman inquiring about the cost for a house cleaning. After Sardone provided a quote, the woman paused, said she couldn't afford it because she was in treatment for cancer, and hung up. Sardone was moved to offer cleaning services for free; unfortunately, she was unable to contact the woman who had called. This interaction led to Sardone offering regular services for cancer patients and planted the seed that would eventually take root as Cleaning for a Reason.

In 2016, Cleaning for a Reason celebrated 10 years of providing free house cleaning services to women undergoing treatment for cancer. Through their network of 1,200 cleaning services partners, Cleaning for a Reason has been instrumental in securing more than \$5.7 million in donated services for over 20,000 women—and they look forward to providing many, many more.

The Power of Partnership

Cleaning for a Reason's relationship with their cleaning services partners is unique. Currently, they work with 1,200 partners, each agreeing to take on 2 patients for free once a month for four months. In addition, these partners make a recurring pledge to support Cleaning for a Reason's efforts to evaluate the more than 1,600 patient applications they receive each month.

"Without our partners, we couldn't do what we do," says Lynn Frankenfield, Executive Director of Cleaning for a Reason. "Not only do they provide cleaning services, but they really do provide a bright spot in the day for the women we serve."

In Search of Efficiency

In addition to administering the monthly pledges from their partners, Cleaning for a Reason processes individual donations, solicits corporate sponsorships, sells products through their e-store, and continues to recruit companies to cover more areas and serve more women. With a staff of just six people, time is at a premium. Efficiency—particularly in terms of how they manage data—is paramount.

Up until a few years ago, efficiency remained somewhat elusive for the Cleaning for a Reason staff—at least in terms of payment processing and data management. “We were using several different databases to manage our information,” explains Frankenfield. Their payment processing system, accounting system, and CRM were not integrated, leading to multiple data entry efforts for the same transaction. This process was further complicated when a donor wanted to make a donation in honor or memory of someone. Each piece of data had to be recorded in a different place, making the payment processing, data management, and donor acknowledgement processes incredibly time-consuming.

Click & Pledge and Salesforce: A Streamlined Process

Cleaning for a Reason’s first step in solving this problem was to use Salesforce to help solve their CRM issues. To help them get started they turned to Dan Woodward, CEO of Urgensee, a nonprofit consulting firm and Salesforce partner. After helping Cleaning for a Reason set up Salesforce, Woodward recommended Click & Pledge to make the process completely streamlined.

“With Click & Pledge, the transactions are auto-created into Salesforce and then synced to QuickBooks automatically,” explains Woodward. “It is far easier to manage the recurring pledges—and declined charges—through Click & Pledge.” This integration is especially critical given the sheer volume of monthly recurring charges Cleaning for a Reason needs to process. With an integrated system, the staff time spent on processing 1,200 pledges monthly has been drastically reduced.

“The ability to have Click & Pledge integrated with Salesforce is critically important for us,” says Frankenfield. “It allows us to access one database to get all of our information. Now everything is very streamlined for us, and the reporting feature is absolutely incredible.”

One benefit of this streamlined process, Frankenfield notes, is the ease of contacting donors after a charge is declined. “We know immediately whether or not cards were declined, which allows us to act quickly,” Frankenfield explains. “This is incredibly helpful for us.” It is not uncommon for a donor to forget to update an expired or lost card, so these immediate notifications are crucial. Frankenfield and her staff are able to contact donors in a timely manner to update their information and maintain a good relationship.

Not only are the relationships maintained, but Cleaning for a Reason has saved time as a result of the Click & Pledge and Salesforce integration. Though she hasn’t tracked the exact savings, Frankenfield notes that with their newly freed up time, Cleaning for a Reason staff is now able to respond to the high volume of program inquiries from patients and the public while providing increased support to their maid service partners. This includes responding to general program questions, assisting with contacting patient(s), or determining how the maid services partners can promote their affiliation with Cleaning for a Reason within their community.

The time savings, Frankenfield insists, are huge. “Time is money for a nonprofit. With a small organization, this is so helpful,” she says. “It really creates a high level of efficiency for us.”

Looking to the Future

Not only has Click & Pledge saved Cleaning for a Reason time, but Frankenfield is pleased with the affordability and flexibility offered by Click & Pledge. With recurring pledges and other payments successfully taken care of, Frankenfield looks forward to working with the other services Click & Pledge offers. Currently, Woodward and Frankenfield are working on coordinating campaigns and soliciting individual donations via Click & Pledge's Connect platform.

"One of the most important features of Click & Pledge is that it has joined forces with Salesforce and will allow us to utilize Click & Pledge's Connect Platform to increase our individual donations," says Frankenfield.

"I look forward to seeing how Click & Pledge will help us grow."