

LUMIN Schools Improves Data Integrity, Creates a Strong Future with Salesforce and Ledgeview Partners



LUMIN Schools was on the hunt for a new CRM solution after they realized they were outgrowing their smaller nonprofit management tool.

Steve Dykema, VP of Mission Advancement at LUMIN Schools, says within the first two months of starting his job, they experienced repeated issues with data entry processing that pushed them to re-evaluate CRM solutions.

Their former CRM tool was not very functional for them, it was difficult to do appeals or acknowledgment letters, and the reporting capabilities weren't what they needed. During the CRM evaluation process, they considered solutions like Donor Perfect and Blackbaud, but Dykema's former experience with Salesforce steered LUMIN Schools otherwise.

Dykema and his team needed a solution that would help them:

- **Create and Manage Reports and Dashboards**
- **Send Letters and Correspondence Out of the System Directly**
- **Enter Notes on Individual Donor Records**
- **Attach Multimedia to Donor Records**
- **Amplify their Social Presence**

With strong recommendations from nonprofit peers, Dykema and his team ultimately landed on Salesforce and soon found Ledgeview to complement the solution's value.



LUMIN Schools

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Through the process of peer referrals, Salesforce and working with Ledgeview rose to the top. Dykema received a strong referral from Safe & Sound in Milwaukee, Wisconsin, on working with Ledgeview Partners to implement Salesforce..

"The referral that we got from Safe & Sound about Ledgeview really checked all of the boxes for us as far as an organization that would be able to do the training for us and provide documentation that would stay in the system and we'd be able to train future employees with," Dykema says.

They also learned through these referrals that partnering with a CRM firm would be in their favor over attempting to implement it themselves in terms of efficiency, turnaround, and expertise.

"The capacity to be able to grow as an organization and be able to stick with whatever CRM we were going to decide to go with, and the overall user-friendliness and functionality of the database led us to Salesforce and Ledgeview," Dykema said.

LUMIN Schools uses Salesforce to:

- **Enhance their email marketing processes**
- **Expand their social presence (beyond just Facebook to now include Twitter and Instagram)**
- **Efficiently send direct mail pieces and appeal letters**
- **Track information in the system**
- **Be used in coordination with Moves Management, a fundraising growth platform, and major gift possibilities**

Dykema says LUMIN Schools has seen a growth of **30% in the number of constituents** and an **uptick in fundraising revenues in the amount of 20%** since implementing Salesforce.

“We needed something that was going to take us into the future and grow alongside us. We have pretty advanced goals, and we thought Salesforce was the best solution to fit them.”

STEVE DYKEMA

THE BENEFITS

Dykema and his team plan to add apps to their Salesforce environment to be able to take credit card payments from donors while they're at events, be able to produce more than one standard version of their acknowledgement letter, and more. Their goal is to become even more sophisticated with their stewardship looking at the future of their Salesforce journey.

Dykema strongly advises other nonprofits who are considering implementing a CRM solution by themselves that it's a worthy investment to partner with a firm.

“The training, making sure the data migrates over as effectively as possible, and the supporting documentation are all things that you should cover with your CRM partner,” Dykema says. “This will help you troubleshoot and navigate the system effectively.”

Dykema affirms Ledgeview's value in implementing Salesforce.

“Ledgeview was easy to work with. The on-site training was exceptional, and Ledgeview set us up to be able to manage the system effectively.”

He praises Salesforce equally.

“Salesforce has a very, very high overall value. I know that I don't have to worry about the integrity of our data, whereas with our other solution, that was constantly on my mind on a daily basis.”

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ABOUT
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In their own words ...

LUMIN Schools is a 501c(3) nonprofit corporation and a Recognized Service Organization of the Lutheran Church – Missouri Synod. LUMIN operates seven campuses in Wisconsin—four in Milwaukee, two in Racine, one in Beloit— and one school in Gary, Ind. Nearly 100 percent of LUMIN's students come from low-income families who participate in the Parental Choice Programs. LUMIN Schools provides safe, Christian schools focused on educational success, leadership development and spiritual growth; and are setting the standard for effective, Christ-centered, results-oriented urban education. For more information, visit www.luminschools.org or find us on Facebook and Twitter.

