

**Bridge It** aims to break the cycle of homelessness and increase connection and belonging. It's flagship program The Cocoon Residential Service provides a home for young people who identify as female and who are exiting out-of-home care.

**Project length** 6 weeks

**Completion date** December 2023

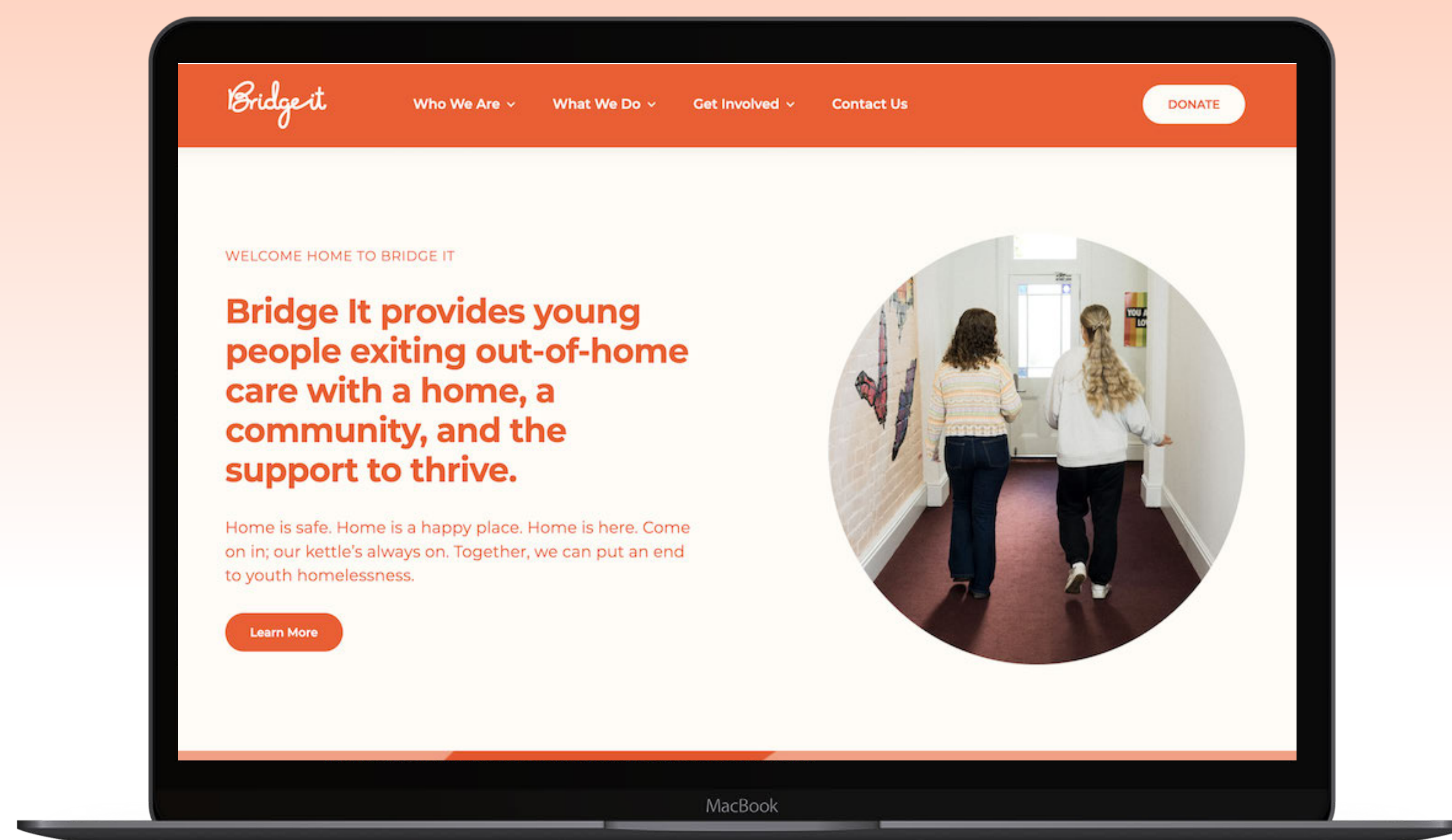
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Kirsten and Jessie at Blaze Your Trail have been instrumental in propelling our Salesforce efforts forward. Their dedication, expertise, and support have paved the way for us to enhance our donor communications and streamline our processes. We are immensely grateful for their partnership and unwavering commitment to helping Bridge It achieve its goals.

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## Challenge

Without a CRM in place, the Bridge It team had to manage fundraising data in three separate and disconnected applications (Outlook, Excel and Xero).

As a result it was very challenging to communicate properly with donors, as there were too many manual processes.

It was also difficult to generate reports without standardised data.

## Solution

Blaze Your Trail assisted Bridge It to become first-time Salesforce users, setting up the necessary branding and themes in addition to the privileges and permissions needed to manage a CRM securely and confidently.

Einstein Activity Capture was established, with team accounts connected and data brought into Contacts and Events retrospectively from Outlook.

Blaze Your Trail setup a Mailchimp for Salesforce integration and provided advice and support to map lists and set up Member Queries.

Reports were built to support donations tracking, with a Dashboard built and displayed on the home page of the custom Bridge It App.

## Benefits

### Operational efficiency

One of the main goals was to reduce the amount of manual work, not only to save time and effort, but to avoid erroneous data. Now there is one source of truth for all contact information for donors and key supporters, and the organisations they work for.

### Reporting and analytics

Bridge It team can generate reports and analyse data with speed and ease. Faster and more insightful reporting leads to better decision-making.

### Integration with other systems

Integrating Mailchimp and Salesforce resulted in streamlined workflows and data synchronisation. Bridge It can build targeted communications that are personalised to the donor, taking their their giving history - both soft and hard credits into account.