



Prudence B2B

Transforming Industries, Empowering Communities



800 Park Offices Dr, Suite 3317
Research Triangle Park, NC 27709, USA



info@prudenceb2b.com



www.prudenceb2b.com

NONPROFIT HEALTHCARE & FUNDRAISING

Regional Nonprofit Healthcare and Hospice Organization

A regional nonprofit healthcare and hospice organization needed to modernize and consolidate Salesforce operations across affiliated entities while strengthening fundraising, donor management, gift processing, reporting, testing, training, and adoption readiness.

ENGAGEMENT

**Subcontracted Salesforce
Delivery**

SECTOR

**Nonprofit Healthcare &
Fundraising**

DELIVERY

**Prudence B2B Salesforce
Services**

THE CHALLENGE

A regional nonprofit healthcare and hospice organization needed to modernize and consolidate Salesforce operations across affiliated entities while strengthening fundraising, donor management, gift processing, reporting, testing, training, and adoption readiness.

OUR APPROACH

Prudence B2B provided senior Salesforce Nonprofit Cloud architecture and delivery leadership, translating complex fundraising operations into scalable processes, migration plans, configuration decisions, testing scenarios, training needs, and adoption priorities.

SALESFORCE CAPABILITIES DELIVERED

- CRM consolidation planning across multiple affiliated organizations.
- Donor, household, account, donation, recurring gift, pledge, tribute, campaign, and credit-process design.
- Acknowledgement, tax receipt, compliance reporting, donor analytics, and dashboard requirements.
- Salesforce-native batch gift entry architecture with templates, defaults, validations, duplicate detection, audit history, and status tracking.
- Data migration planning, testing, training, reporting, and adoption readiness.

BUSINESS VALUE

- Created a more unified vision for fundraising operations across organizational entities.
- Established scalable, Salesforce-native workflows for high-volume gift processing.
- Improved traceability through validation, status tracking, audit history, and reporting design.
- Reduced reliance on fragmented processes by defining consistent donor and transaction-management practices.

TECHNOLOGY & CAPABILITIES

Salesforce Nonprofit Cloud | Fundraising Operations | Data Migration | Batch Gift Entry | Testing & Training | Reporting & Analytics

Need focused Salesforce help? Prudence B2B offers assessments, improvement sprints, implementation support, and monthly managed services.



Prudence B2B, LLC
NC SOSID: 2395132
UEI: Q35NE2L3YPH7
CAGE: 9EV82



+1 (984) 400-5724



www.prudenceb2b.com



Salesforce
Consulting
Partner



ISO 27001
Certified



ISO 9001
Certified



Salesforce
AppExchange
Partner