

# **Simplifying Resource Management & PAS Reporting**

**BY OPPTY**



## About Oppty

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We believe that there are motivated employees within every company that are open to change, willing to learn, and eager to grow. Oppty utilizes technology to automate tedious tasks within your business that then allows valued employees to be freed up to do more meaningful work for your company.

We have a CLIENT FOR LIFE MENTALITY which means we won't quit on you when the going gets tough. We strive to continually offer value & sustain your long-term growth.

By partnering with Oppty, we believe WE CAN HELP YOUR COMPANY BE SUCCESSFUL by educating, enabling and growing your people leading to a more productive, profitable, and enjoyable place to work.

# Experience Nonprofit with Oppty

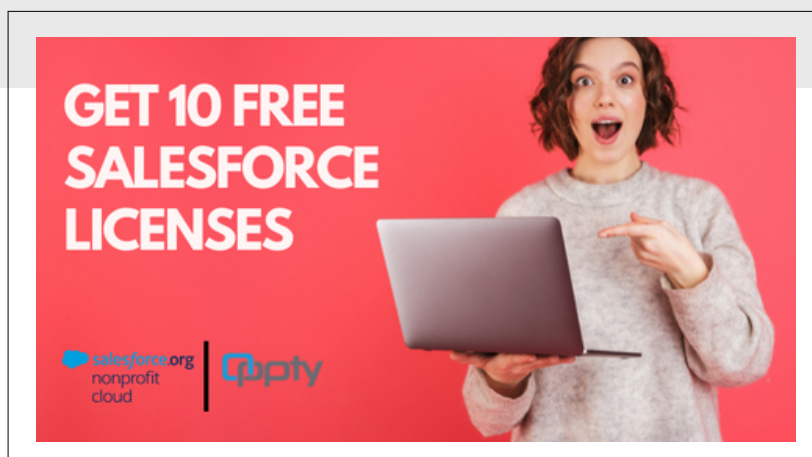
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Although Salesforce has built a phenomenal solution with its Nonprofit product, there are still gaps that your organization may be experiencing with it. Additionally, your organization may have unique processes that are specific to how you conduct your business. In fact, the internal processes that you have developed may be what differentiates you from the competition.

In order to effectively leverage technology, your organization needs to experience what is happening today and apply the knowledge that is available within your organization to intentionally create your organization's future.

## Identifying Problems

Your organization is a nonprofit for a reason - there is a mission you are looking to fulfill and real people that you are looking to serve. In order to do so effectively, you must truly understand the problems that you are facing. In our experience in partnering with other non profits, here are a few examples of the problems we have experienced and the outcomes that we have created, specific to the processes associated with that organization.



# Let's Get Started

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Your organization allocates resources to various clients, who may or may not be SNAP Eligible.

You need to be able to track these resources for accounting purposes, manage the distribution of them to your clients, and ensure that you retain the proper reporting to submit the distribution of these resources for reimbursement.

## The Problem

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Your organization spends a significant amount of time and resources entering (or re-entering) client information, and tracking down the information needed for month end reporting. You need a clearly defined process, focused on resolving the following inefficiencies:

- redundancy in creating, managing, and re-enrolling clients across various programs
- time lost re-entering client information and/or tracking down resources that have been allocated
- significant time lost at month end, reconciling information that should already exist, in order to generate reports needed for reimbursement

# The Solution

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Your Organization partners with Oppty to design a solution specific to your organization and assist in redefining your success by properly leveraging technology. As you become fully aware of the problem that needs to be solved, you realize that if you can assist users in becoming more intentional around how their time is spent, you can directly impact the results that they receive.

In order to do this, you have identified the following steps:

1. Define the Process - to qualify, close, and nurture donors and the service level expectations associated with each step within the process
2. Define Data to Match the Process - The status of all donors (Organizations and Individuals) need to reflect the appropriate status.
3. Define Performance Metrics - determine which metrics will measure user adoption, identify priorities and performance, and track progress on expected results.
4. Design User Experience - identify and determine what components will assist users in measuring donor performance, this should be done at the individual, department, and organizational level.
5. Continuous Improvement - collaborate with users to define an initial release, reset expectations for their role, and work together to increase the amount you receive from your donors.

# The Results

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Your organization receives the ultimate experience, the Oppty Experience. Working with Oppty, you define the problem within your organization, become intentional about solving it, pre-determine the metrics that will measure your success, implement a solution that facilitates the change needed in order to deliver the results you expect you can obtain.

As a result of this automation, you realize that you are likely saving hundreds of hours across your organization. More importantly, you free up organizational resources to do more productive work that accelerates your organization to fulfilling its purpose. As opposed to spending hours a day reconciling data from the resources allocated last month, your people can focus their attention on the following:

- viewing priorities within the organization,
  - identifying clients that may be able to utilize additional resources
  - identifying resources and partnerships that may be able to provide more value to your clients
  - identifying programs and donors that may be able to contribute additional resources to serve your clients
- viewing past performance and results,
  - in order to more effectively communicate the value your organization is creating in the community
  - in order to identify additional ways to leverage technology to improve the user and client experience



**We  
Can  
Help.**

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