



## Success Story: Enterprise System Integration

### Summary:

TerpSys integrated two discrete constituent relationship management (“CRM”) systems, allowing the client to manage consolidated (online and offline) donor data through a single interface.

### Client: The Justice Project (“TJP”)

The Justice Project is a nonpartisan not-for-profit organization dedicated to combating injustice and creating a more humane world through programs such as the Campaign for Criminal Justice Reform and Veterans for America.

### Objectives:

- Provide continuous, automated integration of data between multiple CRM systems
- Create a single interface 360-degree view of donor information
- Add the ability to capture and manage auxiliary information such as blog entries, events, and media references – through the single, uniform interface
- Provide direct, multiple-user, access to this consolidated data both onsite and remotely

### Challenge

TJP’s donor data was maintained on two different systems by two different vendors, one handling online donors (GetActive), and the other handling all other donors (DDI). The systems didn’t communicate with one another, causing many problems, such as:

- Redundant data between - and even within - the systems
- Out-of-date data in one system or the other
- Difficulty in compiling data from both systems to create a “composite view” of a donor

Astonishingly, TJP was unable to directly manage over 80% of its data. Simple requests to retrieve or update donor data had to go through the system vendor, often taking days to execute.

Finally, the ad hoc tools and processes used to manage special events, blog data, media references, and donor e-mails severely limited TJP’s ability to use stored data effectively.

### Solution

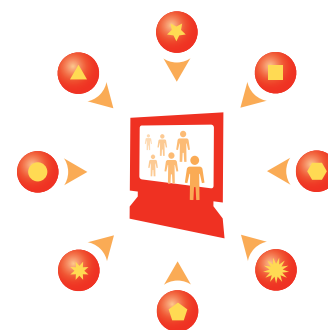
TJP dropped the clumsy “two vendor/ two system” arrangement, and chose Salesforce.com to act as its consolidated source of information.

TerpSys focused on three goals:

- Customizing Salesforce.com’s objects and interface to meet The Justice Project’s operational needs
- Moving critical donor information from the DDI and GetActive databases into Salesforce.com
- Establishing a reliable ongoing process of synchronizing data between GetActive and Salesforce.com

The TerpSys team worked hand-in-hand with TJP to customize the data types managed by Salesforce.com, and modified its user interface to make the data more manageable. We also used Jitterbit, a third-party integration tool, to consolidate data from DDI and GetActive.

TerpSys also leveraged Jitterbit to a first-of-its-type continuous integration between Salesforce.com, GetActive, and The Justice Project’s Direct Mail Processor (DMP).



### Results

- Delivered advanced reporting capabilities with an integrated querying tool
- Improved access to and analysis of donor data
- Ensured real-time synchronization of data in Salesforce.com from GetActive and DMP
- Achieved first integration between Salesforce.com and GetActive
- Migrated and reconciled data for 100,000 contact records, 65,000 donations totaling \$10 Million
- A delighted customer:

*“I knew that TerpSys had a reputation for excellent customer service, but their support and reliability exceeded my high expectations... They understood what we needed and helped [us] reach our goals with unending patience, understanding, and a sense of humor.”*

– JoAnna Moskal,  
Marketing and Development  
Coordinator, The Justice Project