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GallantFew Saves Time and Continues to Expand Using Salesforce

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- Leverage the power of Salesforce beyond data entry and storage
- Automate sign-up forms for veterans and mentors
- Track services offered and provided to individual veterans and mentors
- Enhance fundraising efforts with online donations and an online store

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- Salesforce Nonprofit Start Pack sets the groundwork for systems integration
- Click & Pledge Payment System maintains and grows a healthy fundraising pipeline
- Volunteers for Salesforce enables secure sign-up forms with automatic notifications

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- Improve fundraising to pay staff to carry out mission
- Dramatically increase number of available volunteers, expanding reach and scope
- Save time with automated responses and communication, allowing staff to focus on value-add activities
- Share data with other groups supporting the veteran population to further their missions

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- Karl Monger, Founder and Director of GallantFew

Leveraging the Power of Salesforce

Karl Monger, Founder and Director of GallantFew, implemented the Salesforce Nonprofit Starter Pack in 2012 after learning about it through Techsoup. At that point, he says they entered some data into it and were basically using it like a “big Excel spreadsheet.” Karl knew that there was much more capability within Salesforce, but he had to figure out how to make it fit his organization’s needs.

GallantFew’s core program is based on a strong one-to-one mentoring model and they wanted to use the power of Salesforce to match veterans in need of services with mentors willing to help.

In the summer of 2013, Karl was introduced to Dan Woodward with Urgensee, Inc. Immediately recognizing the possibilities of how GallantFew could leverage the Salesforce.com platform to deal with the challenges of serving their clients, Urgensee accepted GallantFew as their grantee for pro-bono services. Over the course of the following three years, Urgensee provided the GallantFew team with a pro-bono grant equivalent to 10% of the company’s total billed hours.

“Dan at Urgensee is phenomenal. He is responsive when we need assistance on things. Without Urgensee’s involvement and coaching through this process, we would be at ground zero. We would effectively have a great big spreadsheet. We can’t afford a full-time Salesforce administrator but now we have someone with expertise, passion and who is personable and likeable,” said Monger

Customizing Salesforce for Success

Integrate Veteran & Mentor Applications into Salesforce

By leveraging the power of the Volunteers for Salesforce app, we were able to create a sign-up form that both veterans in need of services and veterans looking to mentor can complete. Once they submit their form, their information is populated in Salesforce, and GallantFew staff receive notifications to follow up.

Build a Veteran Case Management System in Salesforce

Once veterans and mentors are in the system, the GallantFew staff needed to see what kind of services are available and which services have been provided to that veteran. To give them a case management tool, we built a few custom objects in Salesforce that allows them to track each service that a veteran has received and any mentoring that veterans have provided to those in need.

GallantFew is also able to categorize services into the five core areas that they work with: spiritual wellness, emotional wellness, physical wellness, professional wellness and social wellness. We also built custom dashboards that lets them easily see the number of veterans they have assisted and better understand the demographics of their population.



Thank you for your interest in contacting the GallantFew Veteran Team. After submitting this form, one of our team members will be in touch with you. Be brave, be bold, be gallant!

Integrate Online Donations System & Online Store

To completely integrate GallantFew's systems, we installed Click & Pledge to process online donations, manage events, and run an online store. The integration allows them to better connect with their donors and to build brand awareness by providing GallantFew products through their online store.

You are making a difference for our veterans.

Patriots like you are the reason GallantFew has been fortunate to provide more than 10,000 services to veterans since our establishment. Thank you.



ONE TIME MONTHLY

Choose a one-time amount

\$500 \$100 \$50 \$25 USD \$ Other

Save Time to Expand Capacity

GallantFew has been able to grow from one volunteer staff member to seven in just a few years. Karl says **“Salesforce has allowed us to continue expanding. It helps with fundraising so we can pay our staff to carry out our mission but now we also have well over 7,000 volunteers in the system. The volunteers sign-up form is secure and has all the features that allow us to automate some responses and communication. It’s a huge time saver which allows us to expand our capacity that much more. We’ve also been able to pull out data to share with other groups that are working with the veteran population and it’s started some great conversations.”**



<https://gallantfew.org/>

GallantFew's mission is to prevent veteran isolation by connecting new veterans with hometown veteran mentors, thereby facilitating a peaceful, successful transition from military service to a civilian life filled with hope and purpose.