

United Way of Greater Lima Implements Effective Remote Campaigns During Pandemic, Increasing Companies by 10%



OVERVIEW

The United Way of Greater Lima in Ohio fights for the health, education, and financial stability of the people in their community. Founded over 100 years ago, the non-profit works with partner agencies and programs focused on the improvement of lives in Allen County. President and CEO, Derek Stemen, recently joined the non-profit and was looking forward to serving the community while improving operations and efficiency for the United Way.

CHALLENGES

During United Way campaign season, their current Fundraising software was not working due to ransomware attacks. This created a backlog of donations, pledges, and workplace campaign management. Stemen, was looking for a more reliable and comprehensive fund-raising, donation management and CRM system to improve reliability and take the organization to the next level in operations.

“What separates Upic from others is that they really are partners. They work collaboratively to help the entire United Way network.”

Derek Stemen
President/CEO
United Way of Greater Lima

SOLUTION

Stemen talked to Toledo and Central Ohio United Ways and Upic Solutions was recommended as a vendor. After reviewing the operations of United Way of Greater Lima, Upic's Connect CRM's donor relationship management system was recommended.

“Upic knows what they are doing and are on the leading front of data security, which was important to us based on our previous experience with downtime due to ransomware attacks. They understand United Ways and were built with United Way input. That was really assuring as a new President,” noted Stemen.

“The Upic Connect CRM solution, provided us dashboards with easy access and real-time information into campaigns and all the details needed to fundraise successfully.”

“Having had experience with Salesforce, and understanding its benefits, Upic Connect CRM provided us with a full solution including integration with Salesforce.org Non-Profit Success Pack® and with Microsoft Outlook”, explained Stemen.



RESULTS

Upic's Connect CRM solution was installed prior to the pandemic in 2020. It helped improve United Way's donor relationship management, campaign insights, pledge and payment reporting and added the marketing tools needed to thrive. The solution enabled team members to access the tools they needed remotely to run a successful campaign.

"We knew it was going to be a rough year with the pandemic and remote campaigns. Upic's virtual pledge processing enabled us to safely continue with campaigns. Upic helped us improve our donors' experience. We would have been sunk without virtual pledge processing."

"Many United Ways were projecting fundraising to be down about 20%. **Upic allowed us to grow, increasing our number of companies by 10% which helped us offset much of the decreases that most United Ways saw due to the pandemic. Many returning donors increased giving by 8% using the virtual pledge software.** Upic is phenomenal and we are thankful to have them as a partner. We also saved approximately 10% of staff time during the campaigns and pledge processing. There is no need for an IT staff."

CHECK OUT UPIC'S SOLUTIONS AND SERVICES

CRM Solutions Cloud-based access to powerful engagement tools	IT Support Your own expert support and helpdesk team	Virtual Office Remote access and hosting for Andar, Office 365
Online Giving Easy donor giving from anywhere	Pledge Processing Simplify operations with outsourcing	Human Resources Knowledgeable HR services tailored for your needs

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YOUR UNITED WAY**

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