

exponent
partners



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Case Study for Cultural Institutions

How the Salesforce platform improved team collaboration, donor engagement, and data compliance at The Exploratorium



Overview



Founded in 1969, the Exploratorium is a beloved San Francisco Bay Area institution and global leader of informal, interactive science education. The Exploratorium creates joyful learning experiences—both online and in-person. The facility offers hundreds of exhibits throughout six spacious indoor and outdoor galleries. More than a

museum, the Exploratorium trains educators and collaborates with partners worldwide on global-exhibit design. With a mission to transform learning worldwide and a vision towards increasing their impact, the Exploratorium embarked on a long-range effort to replace their data infrastructure, systems, and software.

The Need: To create new opportunities for the Exploratorium to engage with visitors and supporters using a data-informed understanding of the visitor experience.

The Solution: A new platform CRM that integrates with the Exploratorium's marketing and communications activities as well as its Point of Sale operations.



A 360 degree view of supporters has unlocked previously untapped multi-channel marketing and fundraising potential



Customized reporting has empowered development staff to create and track new fundraising metrics



New cloud capabilities ensured a seamless pivot to remote work during the pandemic and have eased the organization's compliance burdens





Situation

“In the constituent management systems area, most nonprofits are not going to have the resources in-house to manage these types of sprawling, extremely complicated implementations. You need someone you can trust, who you can lean on and turn to when you run into trouble, when you have to do a complex thing. Exponent Partners turned out to be that trusted partner. That was the difference between success and failure for us.”

– Chris Axley, Director of Information Technology, Exploratorium



Static and inflexible constituent CRM

The Exploratorium’s legacy constituent management system was rigid, static, and inflexible. This made efforts to integrate systems and data across departments difficult, if not impossible. The organization needed

a robust solution that could flex and grow over time. The right solution also needed to be customizable and easy to use by a diverse group of stakeholders within the organization.



Fragmented and siloed data

Various teams within the organization were using different CRMs with limited integration. The result was a jumbled mix of disconnected systems—spreadsheets, databases, forms, workshop applications, ticket lists, and printed materials—that often had to be manually

uploaded or undergo a cumbersome conversion to carry out fundraising and marketing activities. These manual processes negatively impacted productivity and often led to a duplication of effort between departments.

Limited visibility of the customer journey

Data silos between departments impeded the organization's ability to have a 360 degree view of its supporters. For example, how much did they donate, did they come to events, did they utilize other Exploratorium services,

and the numerous other touchpoints that were important to identifying prospects. This led to missed opportunities to cultivate new relationships and steward potential donors.

Clunky and static reporting

Weak data and reporting capabilities made it nearly impossible for the organization to develop and track useful fundraising metrics. Development staff were also hampered in their ability to design an appeals campaign

structure for each need. The Exploratorium needed a customizable solution that could provide meaningful insights into development team efforts and facilitate the development of more robust appeals campaign structures.



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Solution

The Exploratorium engaged in an extended discovery process and needs analysis aimed at the long term goal of linking its payment transactions, constituent management, and communications and marketing systems. Its most pressing need—and a key first step towards proof of concept—was to implement a new constituent CRM. The desire to have one shared platform that could enable a holistic understanding of the constituent journey across its operations ultimately led the Exploratorium to select Salesforce.

According to Patrick McKeever, Information Technology Manager at the Exploratorium, “We needed help painting a vision of the platform, how to build an object, and create a process to populate data in that object. Exponent Partners was able to come in and really listen to what people needed. And then put that through the whole process of what does that look like in Salesforce.” Exponent Partners also worked side by side with the Exploratorium’s IT department to plan and implement the successful migration of its data. This was especially challenging, as the old and new systems had a fundamentally different database architecture.

Importantly, throughout the project, Exponent Partners engaged in a practical team-based approach that allowed the Exploratorium to gain the expertise it needed to take ownership of the new platform. From the start, Exponent Partners and the Exploratorium utilized a collaborative approach across departments, contractors, and stakeholders. The result was a process that was flexible, adaptive, and seamless.

“The process was shockingly smooth.”

– Kati Platt, Senior Manager, Development Services



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Results



360 degree visibility of constituents

When the Exploratorium first switched its constituent CRM, the fundraising team started seeing immediate connections that were previously obscured. “With more visibility, development staff can group people together in more nimble ways and see how they are behaving,” said Kati. As a result, the fundraising team is now able to surface and track more prospects. In less

than a year, The Exploratorium identified and successfully voted in eight new Board members thanks to insights gained from integrated prospect research applications combined with the centralized activity tracking capabilities of Salesforce. This was vital growth for the organization’s governance body, especially during a tumultuous year due to the pandemic.



Customized reporting and metrics

Salesforce integrations like Apsara have allowed the Exploratorium to customize its data reporting and data transformations. As a result, the development team now has the ability to track specific metrics and capture supporting data to identify which fundraising activities have the most return on investment. With the numbers now at their fingertips, development staff have clear visibility on their progress towards fundraising goals.



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The ability to face technology and compliance challenges with confidence

Although remote working capabilities were a low priority when the project first started, having a cloud-based platform became a critical factor during the COVID-19 pandemic. The Exploratorium staff was able to seamlessly shift from exclusively onsite to entirely remote operations within days. As Chris explained, “We don’t want the technology to be a barrier to people being representatives of the Exploratorium. Salesforce is a huge part of that.”

Using Salesforce to manage its constituent data has also eased the organization’s compliance challenges. Bringing the organization’s data into one system ensures a single source of truth; one that can be effectively managed to protect sensitive data and comply with the growing number of global data privacy requirements.



A vision for the future

The Exploratorium’s successful implementation of Salesforce as its constituent CRM has proven the promise of an integrated organization-wide CRM and what it can achieve for the nonprofit.

Importantly, as a science-based organization, the Exploratorium strives to empower its people to find new solutions to nascent

problems. As Kati explained, with the new system in place, “people are excited about things they find online that Salesforce can do.” The organization’s new constituent CRM provides the foundation for endless experimentation and limitless possibilities.

“Now people can see the promise of the Salesforce ecosystem linked up with our transactions systems...the overarching goal of being able to follow and communicate with people on their journey...and how that can be accomplished.”

– Chris Axley, Director of Information Technology, Exploratorium