Non-Profit San Francisco Zen Center improves renewal rate, cash flow and more with MassMailer

BACKGROUND / CHALLENGE

San Francisco Zen Center, established in 1962, is one of the largest residential training Soto Zen Buddhist organizations outside of Asia. Like most non-profits, renewals and cash flow are highly important.

The Zen Center used Salesforce and Constant Contact for their mass email needs and wanted to create a system by which they could send out email reminders to members about their expiring membership. Because Constant Contact is a non-native Salesforce app it was impossible to use it in conjunction with Process Builder to create such a system.

SOLUTION

Searching for a potential solution they found MassMailer on the Appexchange, and discovered that it was a native Salesforce app and worked with Process Builder directly meaning they did not have to know APEX. They got a trial and found that it would meet their needs.

BENEFITS

They have now set up MassMailer / Salesforce Process Builder to send out reminders 30 days before expiration, another in 14 days if no check came in, and if no check arrives after that another email reminder is sent at +1 day after membership expiration.

They also have discovered another benefit in that MassMailer allows email opt-outs to be automatically recorded and updated in Salesforce which lowers the risk of getting "blacklisted". With Constant Contact, they were required to update opt-outs manually which was rarely done because it was time-consuming.

According to Glenn Nyhan, Salesforce Administrator Database Manager, "The MassMailer application simply ROCKS!   As does their support, and it looks like there are a lot of other things we can do with MassMailer that we cannot do with Constant Contact."