

Geode Software Project Profile

Donor Management Software

Industry

Non-Profit

Need

The client maintained all of their donor and donation information in a complex set of Excel spreadsheets. While they were able to effectively track transactions, they needed a solution that would allow them to generate reports and mailing lists quickly and effectively. With the Excel spreadsheets, generating mailing lists was taking weeks of intensive, manual manipulation and reports were generally unavailable.

Challenges

- As a small non-profit, the budget for software and services was constrained
- Data was being stored and repeated in over a dozen different spreadsheets

Solution Type

Software Implementation

Solution

Since the budget was limited, Geode Software assisted in the research and selection of pre-packaged software for non-profit organizations. After assisting in the selection of a product, Geode guided the client through the process of mapping their data needs and planning the implementation of the software. Finally, once the planning stages were completed, Geode assisted with the import of the data from Excel into the new donor management software.

Result

By selecting a cost-effective, full featured software product, the client obtained a piece of software that will serve as the core of their operations. Tasks that used to take days, such as generating mailing lists and printing summary reports, now take only a matter of seconds. The data that was once spread across dozens of spreadsheets is now neatly cataloged in a single location.