



BalancedEffect

WORKING WITH BALANCED EFFECT

Balanced Effect is a proudly female-owned and led Salesforce Partner with extensive experience implementing Salesforce solutions within the nonprofit sector. We bridge the gap between complex technical solutions and day-to-day fundraising needs because we've sat in your seat. Our entire team has transitioned from working directly within nonprofit charities, including roles in fundraising, marketing and operations before becoming consultants. This firsthand perspective allows us to design technology that is practical, donor focused and built for the unique realities of the sector.

Experience

- **Nonprofit specialists:** We uniquely combine hands-on Salesforce technical skill with deep fundraising sector experience
- **Trusted partners:** We have collaborated with many of Australia's most respected organisations, including The Alfred Foundation, Climate Council, Equality Australia, Uniting VIC/TAS and various health foundations
- **Certified professionals:** Our team holds multiple Salesforce certifications, including Nonprofit Consultants

MoveData Experts

We have extensive experience using MoveData to automate complex data flows and restore trust in donor records. Including:

- Real-time data synchronisation
- Complex financial calculations (fees, taxes, payout dates)
- Error monitoring and proactive alerts
- Peer-to-peer fundraising hierarchies
- Reporting overlays for reconciliation
- High-risk data restorations (restoring years of corrupted or lost donor records)

Why Balanced Effect?

- **We speak your language:** Our entire Salesforce team has worked on the ground in nonprofits before becoming consultants. We understand the pressure of your board reports and the nuances of donor stewardship because we've lived them
- **Beyond implementation:** We don't just implement and run. We embed ourselves in your team as a long-term partner, ensuring your system evolves alongside your organisation
- **Access the whole team:** You aren't just getting a technical expert, you're gaining access to a collaborative team that loves sharing knowledge and solving complex problems together
- **Documentation you'll actually use:** We've built internal tools to document every decision made within your Salesforce instance, ensuring that knowledge stays within your organisation

OUR SERVICES

We have a dedicated, experienced team, that has assisted a range of organisations with the following:

Salesforce implementation: Extensive experience in implementing Salesforce solutions tailored for not-for-profit organisations

Data migrations: Expertise in cleaning, consolidating and securely migrating your critical data to Salesforce

Integrations: Connecting Salesforce with your essential tools, including email and SMS marketing platforms, online donation platforms, payment gateways and migrating regular giving programs to tools like Raisely and GiveEasy

Salesforce reviews: Comprehensive assessments of your existing Salesforce system and integrations to identify opportunities for optimisation and enhanced performance

Building new Salesforce functionality: Developing custom features and enhancements to extend Salesforce's capabilities to align with your evolving organisational needs

Training and upskilling: Empowering your team with tailored training and comprehensive documentation to maximise their confidence and proficiency in using Salesforce

OUR ONGOING SUPPORT

Our support model is designed to empower your Salesforce team and ensure the success of your system through the following services:

Assistance with general administrator tasks:

Management of production and sandbox Salesforce instances, providing support for routine Salesforce administration

System updates: Performing necessary updates to fields, page layouts, permissions, objects, reports and dashboards to keep your system current and efficient

Data support: Expert assistance with data-related tasks, ensuring data integrity and usability

User management: Efficiently setting up and updating staff profiles, roles, permissions and access controls

Performance optimisation: Conducting thorough reviews and audits to identify and improve system performance and user experience

Salesforce release and updates: Managing and testing Salesforce releases and new features

Staff support and troubleshooting: Addressing team questions and resolving technical issues

INTRODUCING OUR SALESFORCE TEAM



Lauren Stewart

CO-CEO

Lauren combines over 20 years of non-profit experience with an eye for data and systems development. Working with Salesforce for over 10 years Lauren has played a pivotal role within the organisations she has worked with, designing and developing the database to suit the individual needs of the charities and their supporters.

Lauren's rich history of working with fundraisers, donors and supporters has been pivotal when collaborating with charities and organisations on their migration and implementation of Salesforce. Lauren has worked with a number of hospital foundations in Salesforce implementation and administration such as The Alfred Hospital Foundation, The Royal Children's Hospital Foundation, Austin Health and more.

Certifications:

- Salesforce Certified Platform Administrator
- Salesforce Certified Nonprofit Success Pack Consultant

Sarah Wookey

Head of CRM Solutions and Delivery

Sarah brings a wealth of experience as a client turned consultant in the non-profit sector. She understands the challenges and rewards of implementing Salesforce and strives to make the process as easy as possible; while designing scalable, best-practice solutions.

Leveraging over 6 years of Salesforce expertise, Sarah has led multiple projects and collaborated with some of Australia's largest for-purpose organisations. She has a keen interest in the disability sector and organisations that manage cases and programs. Her passion lies in crafting user-centric systems that drive growth and free up staff to focus on the work that matters most.

Certifications:

- Salesforce Certified Platform Administrator
- Salesforce Certified Platform App Builder
- FormAssembly





Jojo Mepham
Functional Consultant

Jojo brings a wealth of knowledge to the nonprofit sector, having started their career in supporter care before quickly finding their groove in Salesforce CRM. With seven years of experience and expertise spanning NPSP and Nonprofit Cloud platforms, they've become a trusted Salesforce specialist who understands both the technical and fundraising sides of the equation.

Passionate about diversity, equity and inclusion, Jojo's real drive comes from empowering users to make the most of their CRMs. They love teaching people new things and giving them the skills to expand their knowledge. There's nothing better than watching someone have that lightbulb moment. Jojo bridges the gap between complex technical solutions and day-to-day fundraising needs, giving fundraisers the tools and knowledge they need to focus on what matters most: making a difference.

Certifications:

Salesforce Certified Platform Administrator

Sam Copeland
Senior Consultant

With over 9 years experience in the nonprofit sector, Sam has a passion for helping fundraisers spend less time on administration and more time with their donors. Working in multiple nonprofit roles including donor administration, running individual giving programs, community fundraising and bequest, Sam understands the importance of good data, systems and automation.

Sam is an experienced Salesforce nonprofit specialist who's goal is to not only give fundraisers the solution they need but also the tools and knowledge to leverage Salesforce to get the most out of their programs and increase revenue.

Certifications:

- Salesforce Certified Platform Administrator
- Salesforce Certified Nonprofit Cloud Consultant
- Salesforce Certified Nonprofit Success Pack Consultant
- Salesforce Certified Marketing Cloud Account Engagement Specialist
- Salesforce Certified Platform App Builder





Janice Ooi
Senior Consultant

With over 8 years of experience in the non profit sector, Janice is an accomplished Salesforce specialist with a passion for making a difference. Drawing from firsthand experience in the fundraising sector, she understands the unique challenges and needs of organisations striving to make a positive impact.

Janice is also passionate about training and empowering teams to utilise the full potential of Salesforce to drive success.

Certifications:

- Salesforce Certified Platform Administrator



CASE STUDY

CLIMATE COUNCIL AUSTRALIA

A Story of Trust and Transformation

"I've worked with other consultants before, but I've never experienced such a kind, collaborative, and highly skilled team as Balanced Effect" - Gemma Howe, Climate Council's Digital Transformation Manager.

This sentiment is at the heart of Balanced Effect.

The Climate Council stands as a powerful voice for a sustainable future, they are a fearless champion of the climate solutions Australia needs. Yet, like many vital not-for-profit organisations their capacity to drive this mission forward was constrained by their core technology; specifically, an inflexible and unreliable regular giving platform.

At Balanced Effect, we understand that every moment spent wrestling with inaccurate data is a moment lost for advocacy. The Climate Council needed more than just a migration; they needed a renewed foundation of trust in their data to ensure their sustainable fundraising could power their critical work.

The Challenge

The Climate Council faced a legacy of problematic data. A previous Salesforce migration left their regular giving program in disarray, with missed payments and inaccurate records. "Previously, we couldn't trust the data, which created inefficiencies and workarounds," - Gemma.

Our Solution

We stepped in, recognising the need for both expertise and empathy. Our strategic move was implementing Raisely for regular giving, a highly effective alternative and connecting MoveData to close the data loop. Our mission: to create a seamless, live data flow into Salesforce, making it the Climate Council's single source of truth.

Our Core Difference

What truly sets Balanced Effect apart is our team - we're all based in Australia and New Zealand and, crucially, come from nonprofit backgrounds.

This isn't just about technical skill; it's about a deep, genuine understanding of the daily realities and unique challenges nonprofits face. We have been the end users which helps us provide a better service.

As Gemma emphasised, "The team did an incredible job managing this complexity. When we went live with Raisely and MoveData, there wasn't a single incorrect charge or missed donation. This was a huge achievement, especially considering the historical implementation issues that had previously impacted all of our regular givers. The contrast between past challenges and this flawless transition was enormous, and it made a real difference for both our internal team and our donors".

The Impact

Flawless Go-Live: Preventing further disruption was paramount. Our meticulous coordination and close collaboration with partners like Raisely, MoveData and Salesfix ensured a smooth and precise transition.

Trusted Data: Before the transition, we embarked on a significant project: restoring five years of lost or corrupted donor data. This wasn't just about technical fixes; it was about meticulously gathering information to ensure their data was clean, accurate and reliable.

Building Internal Strength: We didn't just fix systems; we built capability. We provided comprehensive reports and training, ensuring the Climate Council team could independently track and manage their programs. Ensuring they could maximize their system's potential without perpetual reliance on us.

Empowered Donor Engagement: New Raisely forms revolutionised their donor interactions. "The flexibility and functionality we gained made a huge difference in how we engage with donors."

The collaboration with Balanced Effect transformed a high-risk operational headache into a foundation of clarity and confidence. We are proud to have provided the support needed for a flawless transition, allowing the Climate Council team to dedicate their energy to what truly matters: fighting for climate action.

"We wouldn't have been able to effectively run our fundraising programs without these critical improvements," Gemma concluded.

For us, delivering such tangible value while building true partnerships is what it's all about.



CASE STUDY

THE ALFRED FOUNDATION

The Alfred Foundation, Balanced Effect and Ortto: Trust and Collaboration in Partnerships

How we helped The Alfred Foundation build stronger donor relationships more efficiently - a demonstration of the harmonious partnership between The Alfred Foundation, Balanced Effect and Ortto.

The Alfred Foundation's mission is to raise funds for the Alfred Hospital, fostering innovation, and enhancing patient care, research and equipment. They understand that powerful and clear communication is essential to generate vital support and awareness. To achieve their goals, they require an intuitive, integrated and scalable marketing platform.

The Challenge

For years, The Alfred Foundation relied on an email platform that had simply been outgrown. It was a friction point that limited their ability to engage their community effectively due to it being outdated, clunky, difficult to use and did not have SMS integrated.

Our Solution

We recommended The Alfred Foundation make the switch to Ortto to get more out of their Salesforce data, build stronger donor relationships, streamline operations and regain lost time.

Once they made the switch, they never looked back. Together, we have implemented personalised campaigns that generate donations and awareness. This has translated into a 60% increase in their open rate and 3% increase in click their through rate.

We built internal workflows that streamline their operations, ensuring their data across both the Ortto and Salesforce platforms is now reliable.

By migrating to Ortto we have helped The Alfred Foundation move beyond the constraints of outdated technology to achieve sustainable and powerful supporter engagement.

This is just one example of how we have collaborated with the team at The Alfred Foundation over the three years we have been working together. They look to us to help strengthen their internal data and systems team, offering support and guidance across Salesforce and their integrated systems.

We have fostered a genuine partnership with Hilary and the team at Alfred and it shows in trusting our recommendation with the move to another platform.

“We have worked with Balanced Effect for a long time and it is always a pleasure working with them. Lauren is extremely knowledgeable and she always works hard to achieve our desired outcomes. We always feel confident we are in safe hands with Balanced Effect” Hilary Kehridakis, Senior Database and Systems Manager.

<https://ortto.com/case-studies/balanced-effect-x-the-alfred-foundation/>

