

Customer Success Case Study

Kelowna's Gospel Mission



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Gospel Mission

Onboarding a New
Fundraiser in 60 Days

*A conversation with Troy
McKnight, Corporate and
Community Relations, Kelowna's
Gospel Mission*



 wisely.

Kelowna's Gospel Mission

When COVID-19 first took hold, the team at Kelowna's Gospel Mission was in a delicate position. KGM feeds the hungry, shelters the homeless, and provides compassionate assistance to all. During the pandemic, social services were more important than ever before. There was an immediate need for new vans, to provide meals and support where it was most needed.

To meet the growing needs, KGM expanded their fundraising team and hired Troy McKnight who was experienced in social services but new to fundraising. Looking to engage the community, Troy's focus was to learn about the donors and make connections in his first year.

With the help of Wisely's Moves Management System, Prospecting Tool, and personalized software onboarding, Troy raised \$68K in less than two months during a worldwide crisis.

The Challenge

KGM has a loyal following of donors with most of their funds raised through mail, email, and a handful of major gift donors. How would Troy sort through and prioritize thousands of annual donors and build a mid-level and major gift pipeline?

Through their existing process it would mean running reports on past gifts through their CRM and prospecting blind. How would Troy onboard and learn how to be an effective fundraiser over the course of his first year?



“Our organization is just starting to figure out that we need a process and therefore they didn't have anything to give me when I started. But Wisely created this fundraising onboarding process and it helped KGM and me get organized and move forward.”

Troy McKnight, Corporate and Community Relations



The Opportunity

With Wisely integrated with their CRM (RE NXT), Troy was able to find the best prospects using Wisely's prospecting tool. In just two weeks after Wisely training, Troy had identified more than 30 mid-level and major gift prospects and added them to his portfolio.

By following Wisely's prescribed moves management and simple to-dos, Troy actively reached out to the best prospects, to introduce himself and learn what motivated KGM donors to give.

The Impact

In less than two months since going live with Wisely, he raised \$68K and counting from KGM's existing donor database and considers Wisely as his onboarding plan. In his 3rd month, Troy continues to expand his portfolio and now has 130 prospects to engage with and has also helped finish the campaign for new vans.

"If what I'm doing is extrapolated over the year, I'm going to exceed my fundraising goal in my first year and I'm able to do this only because I'm using Wisely"

Troy McKnight, Fundraiser

Accelerate your fundraising with Wisely

Wisely's AI-powered fundraising software solution gives you real-time insight into your donor portfolio so you can connect with the right donor at the right time, bring in more gifts, and enjoy a better donor experience.

Fundraisewisely.com/request-wisely-software-demo

Results

145



donors identified and added to their portfolio through Wisely's intelligent AI fundraising system



8

Eight weeks. The amount of time it took to onboard a new fundraisers and see results

\$68,000

of revenue unlocked in less than TWO months

\$158,000

Estimated first-year portfolio value for Mid-Level and Major Donors



Wisely's built in Moves Management feature ensures easy access to a snapshot of their fundraising prospects

