



"They are a great partner to work with. Through their knowledge and expertise, they've helped us ensure we have the program tracking and platforms in place to meet and achieve company-wide goals."



Sarah Ryan
Senior Manager, Partner Relations



SECU MD has been open since 1951. It's the largest credit union in Maryland with assets totaling \$4.21 Billion and providing banking services to more than 253,000 members.

The credit union is a member-owned financial cooperative providing banking services including savings, loans, and other financial services to members. Membership is also open to the immediate family of current members.



Plative is a Salesforce Implementation partner as well as an Oracle NetSuite Alliance Partner. As a global consultancy, Plative builds long-lasting partnerships with some of the world's most recognizable organizations to support and augment their missions.

Business Case

SECU MD receives donations from a number of channels, such as peer-to-peer fundraising, events, and employee donations. SECU MD's data lived on a variety of platforms, providing silos of information, and unclear reporting.

Solution

Salesforce **Nonprofit Success Pack** was leveraged to manage the donations along with the Individual/Household relationship of SECU MD's constituents. **Classy** was implemented to sync and integrate donations, campaigns, and contact management to better track development efforts. Plative also configured NPSP settings to improve the data cleanliness of incoming donations.