

Lake Forest integrates GiveCampus API with Slate CRM to streamline gift processing

THE CHALLENGE

Streamline data exports for online giving in advance of giving day

Lake Forest College, a small, diverse liberal arts college with around 1,700 undergraduate students located outside of Chicago, sought to streamline its online giving process in advance of its annual spring giving day, Forester Day.

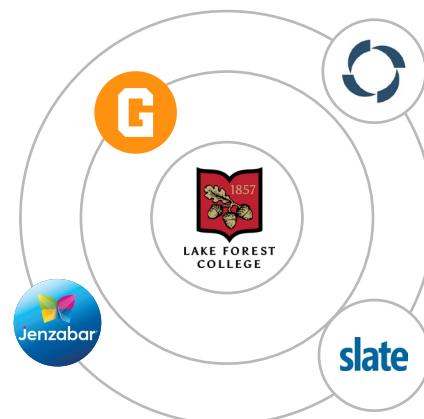
The college's primary tech stack includes:

- Slate customer relationship management (CRM)
- Jenzabar for enterprise resource planning (ERP)
- Constituo integration platform as-a-service (iPaaS)

While Lake Forest was already using GC Social Fundraising, manually uploading records from GiveCampus into the Slate CRM was tedious and time-consuming.

"We would have to do manual uploads, pull the report from GiveCampus, make sure the report was titled and lined up correctly, and then do an import into our database and make sure they all wrote correctly," says Kristi Kauth '21, Assistant Director, Slate Data and CRM Operations.

Each upload took up to an hour to complete. "It was my whole day."



GIVECAMPUS

THE SOLUTION

Build custom API integration to automate record uploads

Matthew Wamboldt, Lake Forest's Director of Enterprise Applications, built a custom API integration to connect GiveCampus' data output to their CRM and other solutions, using Constituo's integration PaaS.

While GiveCampus and Slate CRM can integrate directly using their respective APIs, using an integration platform allows the team to make changes to their tech stack over time without reinventing the wheel.



Matthew Wamboldt
Director of Enterprise Applications at Lake Forest College

"We're not writing custom software that's running internally to us, it's extendable to other platforms," says Wamboldt. "So if we changed CRMs tomorrow, we could just change where we output the file."

Wamboldt built the custom integration in less than a month, and noted that it didn't require senior development skills to engineer. "Anyone in a standard entry-level developer position should be able to do it," he says.

Once the integration was complete, the team tested it by pulling the previous 90 days' worth of gifts to see whether the integration populated all of the data correctly, and made a few small modifications to ensure consistency in how gifts were designated.

With the wrinkles ironed out, they were confident that the custom API integration would optimize the gift processing on Forester Day.

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THE RESULTS

A seamless transition, with manual processing time reduced by more than 50%

Lake Forest experienced a record-breaking Forester Day, with over \$676,000 raised—and the integration made the process of recording the gifts much more efficient, without the need for Kauth to manually upload and audit records.



Kristi Kauth
Assistant Director, Slate Data & CRM Operations at Lake Forest College

"Ninety to 95% of the records worked successfully or we caught the discrepancy in time to fix, so that the rest of them wrote well. It was a huge time-saver," says Kauth. "It probably saved more than half of my day."

Kauth also says that the risk of error is much lower with the API integration. "With Slate, if I need to make a change to designations on a form, I'll need to notify the team not to send anyone to the page since I was testing it live. But with GiveCampus, it's so much easier to make changes on the fly because you don't keep it live."

That change provides the team with more opportunities to iterate on their forms to improve conversions for their everyday online giving in the future—paving the way for even more record-breaking giving days.

To schedule a demo, please visit:
info.givecampus.com/schedule