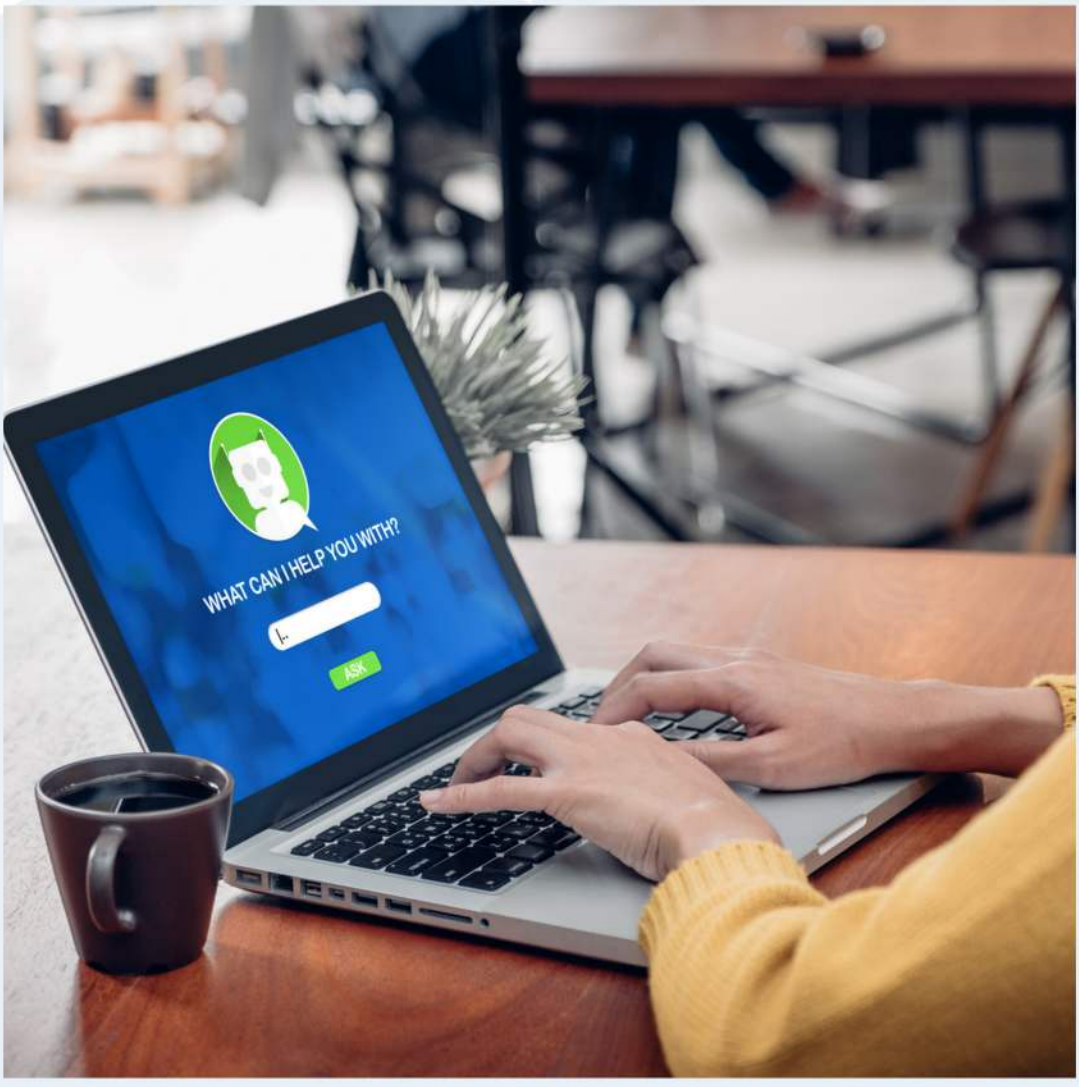
Charity Growth Academy by CanadaHelps

Art of the Possible: Online Chat or Support Desk



The Benefits of These Tools

Nonprofits can significantly benefit from the use of online chat or support desk tools (e.g. Freshdesk, Zoho Desk, etc) in various ways. These platforms provide an efficient method for responding to inquiries, thereby saving time and resources that can be better utilized elsewhere within the organization. Additionally, they allow for real-time interaction, which can enhance relationships with donors, volunteers, and beneficiaries, fostering a sense of community and engagement.
Furthermore, these tools can be instrumental in collecting feedback and insights, which can be used to improve services and operations. Lastly, many of these tools have features specifically designed for nonprofits, including discounted pricing and integrations with donor management systems, making them an accessible and valuable resource for nonprofit organizations.

Integrations

Integration of online chat or support desk tools with a CRM or other core systems is a straightforward process that can be accomplished in a few steps. By connecting these platforms, nonprofits can have a unified system that provides a holistic view of their interactions with donors, volunteers, and beneficiaries. Integration is usually achieved either through built-in functions provided by the software vendors or through third-party integration tools.

These allow for automatic data synchronization between systems, ensuring that any interaction recorded in the chat or support desk tool is immediately available in the CRM system. This helps keep all team members updated about recent interactions, assists in tracking the stakeholder journey, and enables the delivery of personalized experiences based on past interactions. This integration also allows for better data analysis, improving decision-making processes within the nonprofit organization.

CASE STUDY

Consider the successful use of an online chat or support desk tool by a child welfare-focused nonprofit. Faced with a growing number of inquiries and a need for efficient communication, the organization implemented a live chat tool and integrated it with their existing CRM. The integration was achieved using built-in functions provided by both systems, enabling automatic data synchronization.

Whenever a volunteer, donor, or beneficiary interacted via the live chat, the interaction was immediately recorded and visible in the CRM. This provided all team members with timely updates about recent interactions and helped track the journey of each donor effectively.

The live chat tool not only increased their efficiency in handling inquiries but also helped them establish stronger relationships with their community. Using the insights collected from the live chat and CRM data, the organization was able to deliver personalized experiences to their donors and beneficiaries, which significantly boosted their engagement levels. The integration also facilitated better data analysis, leading to more informed decision-making within the organization.

Through the use of the live chat tool and its integration with the CRM, the organization streamlined their communication processes, improved community engagement, and ultimately made a greater impact with their mission.