

## CUSTOMER STORY

The Salvation Army,  
USA Southern TerritoryDOING  
THE MOST  
GOOD®

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—Debbie Diaz, Assistant CRM Director

The Salvation Army, USA Southern Territory is a pillar of hope, support, and community service across 15 states in the southern United States. At the heart of the Salvation Army, USA Southern Territory’s daily operations is Blackbaud Enterprise Fundraising CRM. This comprehensive, enterprise-scale CRM system helps the organization manage donor interactions, streamline data, and boost efficiency.

## The Salvation Army, USA Southern Territory Empowers Fundraisers with Blackbaud Software.

The Salvation Army, USA Southern Territory has touched countless lives, providing services such as shelter, financial aid, holiday assistance, and support for individuals dealing with food insecurity, unemployment, and other difficulties. Last year alone, the organization distributed 60,011 food boxes and provided 426,789 snacks and 442,737 drinks. The USA Southern Territory’s longstanding partnership with Blackbaud has helped support their impact. With over 600 active users from Washington, D.C. to Texas, the organization relies on Blackbaud software to enhance its fundraising and data management processes, improve productivity and boost donor engagement with its 6.5 million constituents.

Since adopting Blackbaud Enterprise Fundraising CRM in 2010, the USA Southern Territory has successfully optimized their workflows to ensure that

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is powered by:

Blackbaud Enterprise  
Fundraising CRM™



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6.5M  
constituents

fundraisers and teams across various command centers are well-equipped to engage donors, manage data, and achieve annual fundraising goals. Assistant CRM Director Debbie Diaz emphasized how crucial the software has been in keeping operations running smoothly and empowering staff to serve their communities effectively.

“Blackbaud Enterprise Fundraising CRM works—and it works well,” she said. “We’ve had it for so long, and it continues to support our fundraising operations across hundreds of users and diverse locations. It lets us take the administrative burden off our fundraisers so they can focus on what matters most—building relationships with donors.”

Diaz also highlighted the importance of ongoing support and adaptability. For troubleshooting and ongoing system support, the USA Southern Territory depends on an in-house help desk team and operations staff, and trusted Blackbaud partners like BrightVine. “With the flexibility to customize, the ability to integrate enhancements, and the additional support from partners like BrightVine, it’s just smart to stay with Blackbaud,” said Diaz. “Why would we want anything else when this works so beautifully for us?”

## Taking Advantage of Extensibility

The USA Southern Territory extends the power of Blackbaud Enterprise Fundraising CRM with Power BI and pulls data from the software to deliver dynamic, visual reports. These reports simplify data analysis for users, making it easier to track progress and collect actionable insights. Connecting Power BI with the BrightVine Data Loader tool simplifies data imports and batch updates, making it easy to fix errors or modify large sets of data quickly.

“The BrightVine Data Loader has been a game-changer for us. Whether it’s correcting accidental entry errors or uploading interactions in bulk, it saves our fundraisers hours of manual work,” said Diaz. “It’s one of the tools

that makes Blackbaud Enterprise Fundraising CRM even more powerful—streamlining our processes and helping us support our teams more efficiently.”

The check image enhancement feature is another favorite among users. Integrated with CDS Global’s Web Image Archive system, this feature enables users to access check images directly within Blackbaud Enterprise Fundraising CRM. This has greatly improved the process of addressing donor queries or verifying details from checks. “Checking images directly within the software saves so much time—no more switching between third-party applications. It’s all there on the revenue record,” Diaz noted.

## Leveraging Built-in Innovations

The ability to batch interactions has provided significant time savings for fundraisers on the road. Using Excel templates, they can log interactions collectively, which guarantees that all communications are documented efficiently. The pending activities feature further help fundraisers stay organized, automatically flagging donors who haven’t been contacted in over a year for follow-up.

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Another innovative use of the Blackbaud Enterprise Fundraising CRM is their designation of “Major Giving Suspect” constituencies, allowing fundraisers to identify potential major donors while ensuring intentional and coordinated outreach. Notifications within the system prevent duplicate efforts by alerting staff if someone is already working with a specific donor.

As technology continues to evolve, the USA Southern Territory will keep exploring new innovations with Blackbaud. The organization remains focused on evaluating advancements that can further optimize their operations and amplify their impact.

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### About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world’s leading cloud software company powering social good. Serving the entire social good community—nonprofits, higher education institutions, K-12 schools, healthcare organizations, faith communities, arts and cultural organizations, foundations, companies, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, data intelligence, and expertise. Learn more at [www.blackbaud.com](http://www.blackbaud.com).

