

Data automation masterclass

How two complex organizations replaced
manual workflows with intelligent automation.



hoag[®]

Hospital Foundation

KindCon²⁰²⁶





Alyce De La Cruz

Executive Director,
Advancement Services
Hoag Hospital Foundation



Rebekah Kurisu

Manager,
Grateful Patient Program
Hoag Hospital Foundation

hoag.
Hospital Foundation



KindCon²⁰²⁶



**A nonprofit, regional healthcare delivery system
in Orange County, California**



1.6M+

Patient Visits Per Year



2

Award-Winning
Hospitals



13

Health & Wellness
Centers



430,000+

Unique Patients



40,000+

Inpatients



400+

Physician Partner
Offices



1,900

Physicians



18

Urgent Care Centers



7

Specialty Institutes

hoag[®]

Hospital Foundation



Our Mission

Advancing the mission of Hoag through meaningful and inspirational philanthropic partnerships.



Our Vision

Hoag Hospital Foundation is a recognized industry leader and trusted philanthropic partner, playing an integral role in Hoag's success.



\$100M+

Raised Annually



100+

Foundation Staff



29

Endowed Chairs

Why Grateful Patient Programs Matter

Patients often have a strong desire to give back after exceptional care

Timely engagement is critical

Physician partnerships are essential

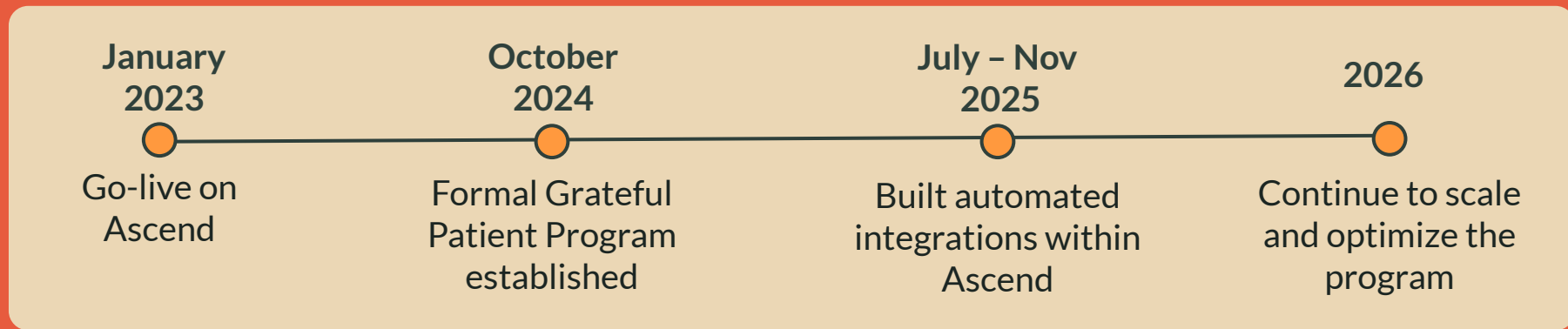
Sustainable major gift pipelines require systematic identification and follow-up





The Complexity

Building the System



Challenges to Solve



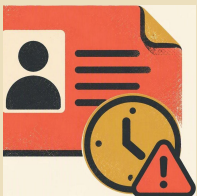
Disconnected systems

Shifting between the Data Mart, Power BI, Ascend, and Excel to review prospects



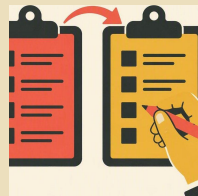
Delayed patient information

Manual delays for wealth screening and patient visit history reports made it hard to act within the donor gratitude window



Manual imports

Using Dataloader to import up to 9 files to Ascend for each physician's patient list



Outdated records

Delayed updates from EMR resulting in duplicate record creation and stale contact info

Disconnected Systems



Ascend
CRM



Epic
EMR



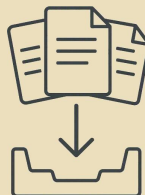
Data Mart
SQL Server



Power BI
Analytics



Excel
Spreadsheets



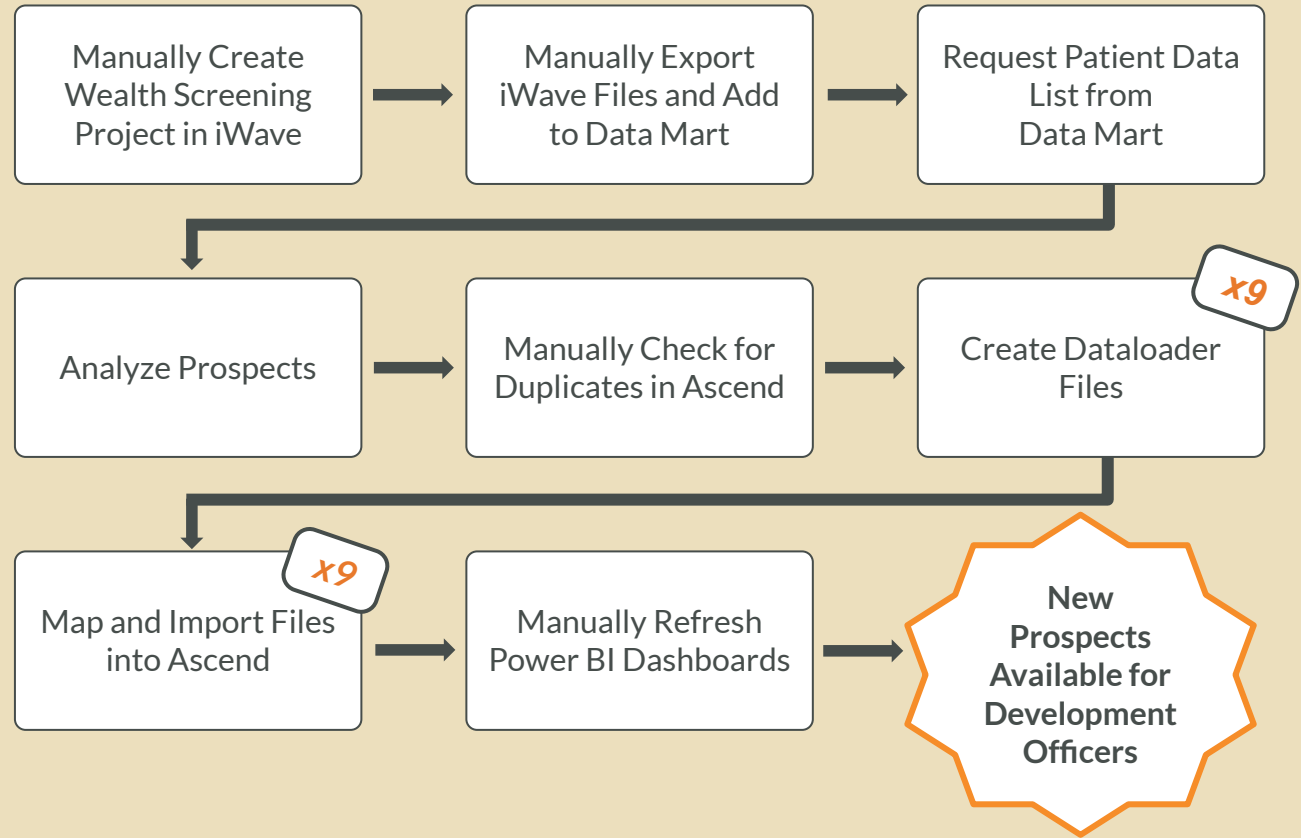
Dataloader.io
Importing Tool



iWave
Wealth Screening

Data Integration (Before)

24 Steps

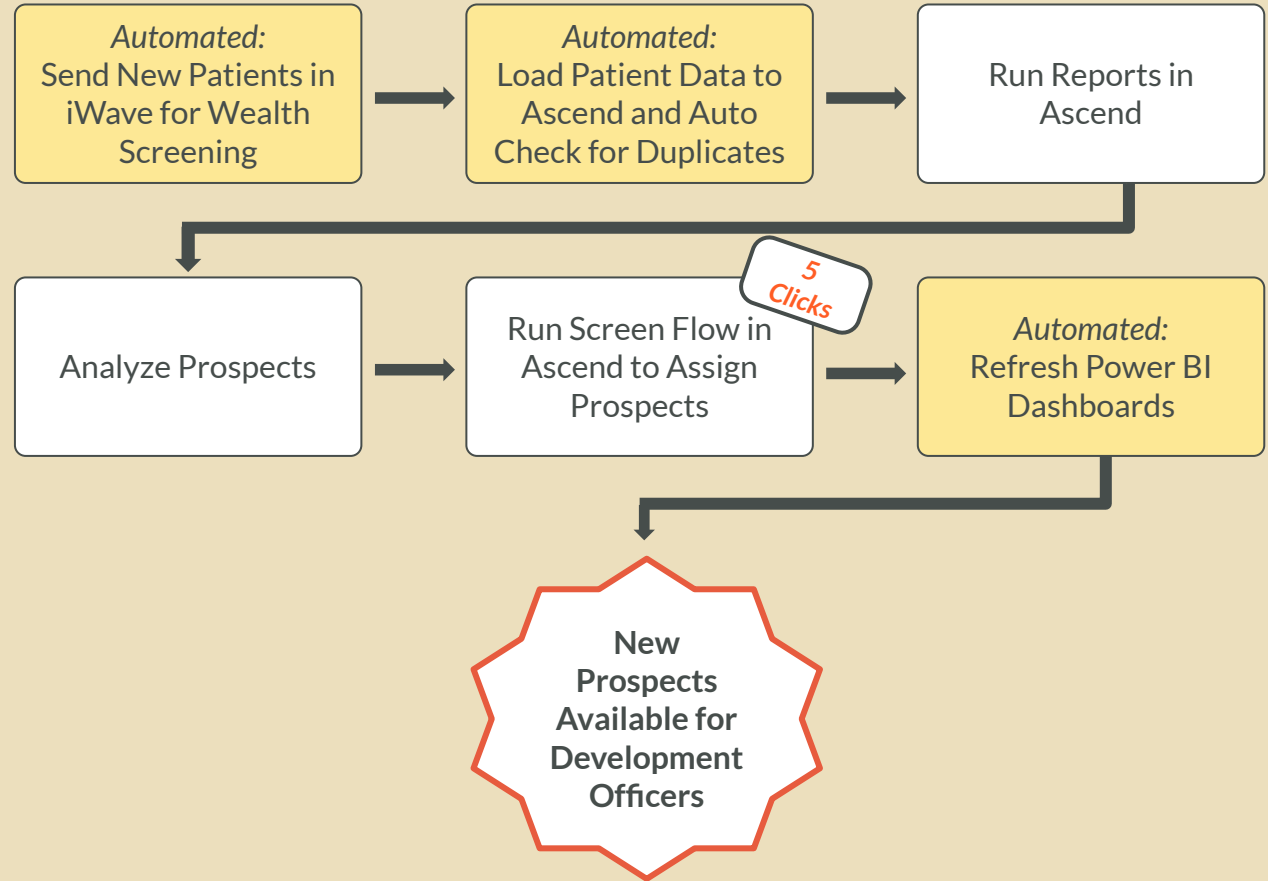




The Solution

Data Integration (After)

7 Steps



Integrating the Systems

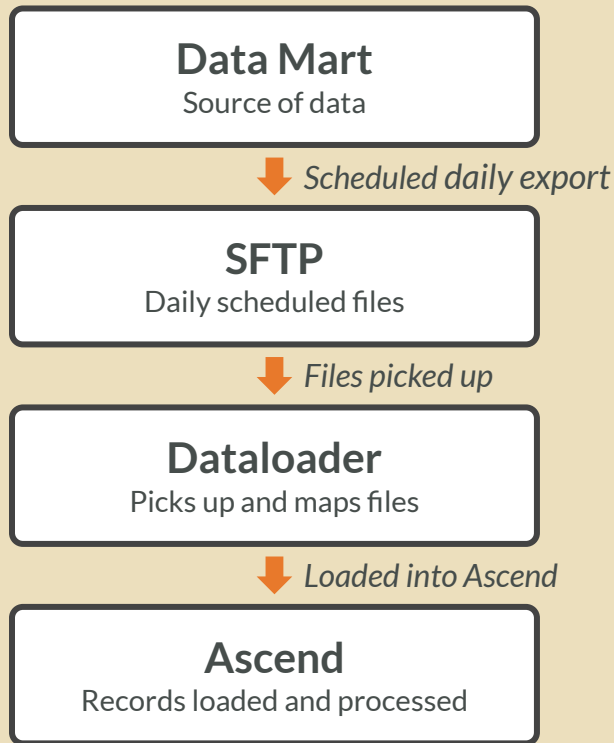
Scheduled Daily Files from Data Mart to SFTP (Secure File Transfer Protocol)

- Patients
- Physicians
- Visits
- iWave Scores

Scheduled Daily Dataloader Jobs to Load to Ascend

Scheduled Jobs to Process in Ascend

- Deduplication Process
- Interim Processing to Create or Update Constituents

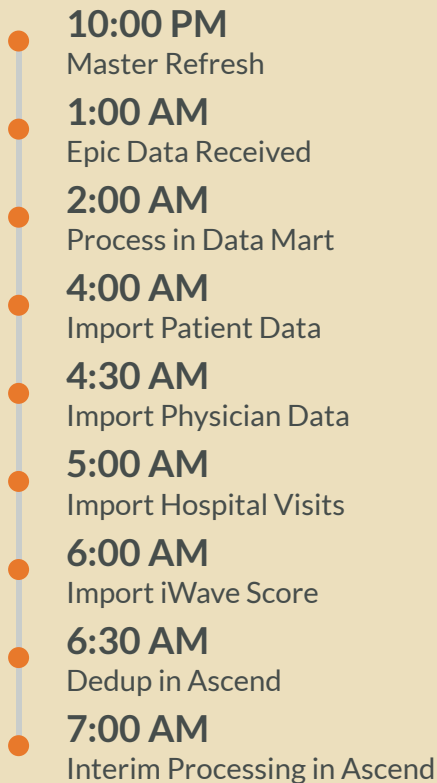


Automating the Imports

Scheduled jobs each night in alignment with existing refresh processes (once a day)

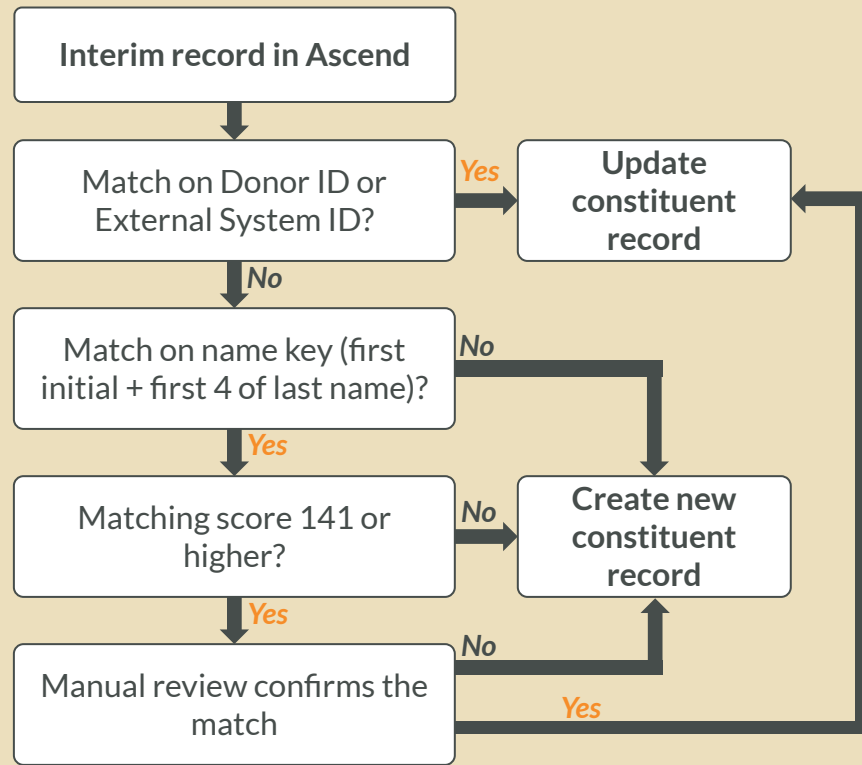
Receive notifications when jobs are successful or experiences errors

Manual review for items that require human input (confirming duplicate matches)

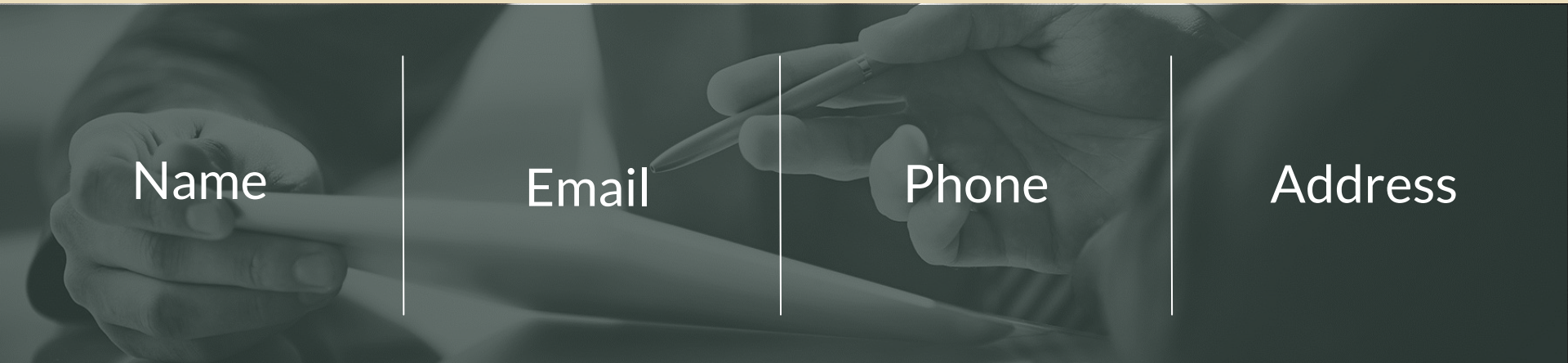


Checking for Duplicates

- Using Interim record in Ascend to check for possible duplicates, comparing:
 - External System ID
 - Matching Key
 - Custom Matching Rules
- Matching score based on combination of first name, last name, address, phone number, email, and date of birth



Updating Contact Info in Real Time



Created system within Data Mart to identify patients that had changes to their contact information in Epic. Those patient records added daily as interims in Ascend and automatically updated these fields for the most up to date information to reach the prospect.

Updating Security Settings

With enhanced security set-up in Ascend, all patient data remains HIPAA compliant and available only to staff who need access as patients move through the pipeline by using the following Salesforce configurations:

- Permission Sets
- Field level security
- Sharing rules
- Custom permissions

Automating the Workflow

Kindsight developed custom jobs in Ascend to:

Open up visibility of patient records that are identified as grateful patient prospects or engage with the Foundation through other ways (give, attend event, etc.)

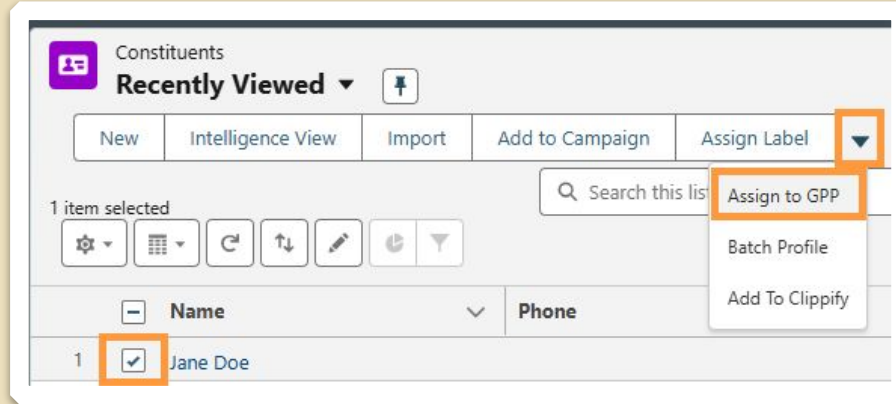
Calculate patient visit stats to strategize which physicians to engage

- Top visited physician
- Number of visits in last 12 months
- Number of visits to top visited physician

Assigning the Prospects

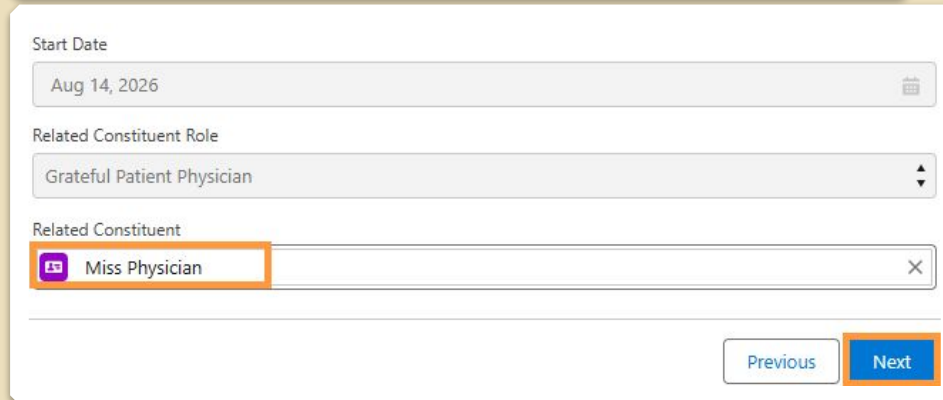
Once prospects are identified, a custom screen flow in Ascend automates the assignment process

1) Select constituents from a list view and select “Assign to GPP”



The screenshot shows the 'Recently Viewed' section of the 'Constituents' interface. At the top, there are buttons for 'New', 'Intelligence View', 'Import', 'Add to Campaign', and 'Assign Label'. The 'Assign Label' button is highlighted with an orange box, and its dropdown menu is open, showing 'Assign to GPP' as the selected option. Below the buttons, there is a search bar and a table of constituents. The table has columns for 'Name' and 'Phone'. One constituent, 'Jane Doe', is listed and has a checkbox next to her name that is checked and highlighted with an orange box.

2) Select the physician to relate to the constituent



The screenshot shows the 'Start Date' and 'Related Constituent' fields. The 'Start Date' is set to 'Aug 14, 2026'. The 'Related Constituent Role' is set to 'Grateful Patient Physician'. The 'Related Constituent' field is set to 'Miss Physician' and is highlighted with an orange box. At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted with an orange box.

Assigning the Prospects

3) Select the Development Officer to be assigned as the Relationship Manager

Grateful Patient Physician relationships created successfully!

Select the Development Officer who will be assigned as the PRM.

* Assigned Relationship Manager

 Rebekah Kurisu

Assignment Start Date

Aug 12, 2026

Assignment Type

Relationship Manager - Primary

☒ Is Grateful Patient Prospect

4) Select the Task details to be added for the Grateful Patient Letter

* Letter Code

GPP Physician Letter

Comments

Subject

Mailing

Activity Type

Pre-Qualification

Priority

Normal

Status

Open

☒ Is GPP Outreach

5) Complete the flow and automations

GPP Mass Constituent Screenflow

GPP Letter Tasks created successfully! Select "Finish" to update the Stage of Readiness for each account to Pre-Qualification, add the Constituent Type of Grateful Patient Prospect, and complete the Flow.

Previous Finish

The Transformation

Measure	Before	After	Result
Weekly data processing	Up to 13 hours	Average 10–15 minutes	Minutes, not hours
Workflow steps	24 steps	7 steps	Automated workflow
Data flow	Manual uploads	Epic → Ascend, daily	Real-time data
Prospect screening	Manual & batched	Automated & scored	Faster prioritization

Physician Coordination



Configured new way to track physician and development officer partnerships directly within Ascend

Implemented real time data for outreach in alignment with development officer and physician meeting schedules

Aligned fundraiser outreach to new donors with clinical partners in the Grateful Patient Program

Introduced new way for clinicians to refer directly from Epic by adding the Grateful Patient FYI flag to a patient's chart



The Outcome

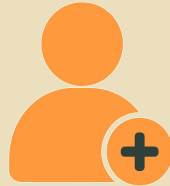
Measurable Outcomes

In the first six months of 2026



50K

Prospects Identified
newly for the pipeline



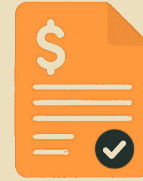
38

New Donors
engaged and giving



7

Gifts Over \$100K
major gifts secured



12

Major Gift Proposals
with planned asks



\$5.1

Dollars **M**aised
in the first six months

Reporting



Enhanced Salesforce reports and dashboards with more robust data tracking in Ascend



Power BI dashboards for development officers to manage their GPP portfolio and each individual prospect in the process of outreach



Provide quarterly updates to our leadership team on grateful patient program outcomes and user adoption



Measure physician engagement and giving capacity of prospects per physician

Lessons Learned



Coordination with Other Teams

Align early with hospital data, records management, and prospect & management partners.

Clarification of New Terminology

Provide awareness of new processes and terminology in simple terms to prevent confusion.

Resources & Timing

Scope realistic staffing and build schedule buffer; bulk data uploads can take longer than expected.

Salesforce Governor Limits

Design batch sizes and nightly jobs around platform limits and existing automation.

Washington University of St. Louis





Beverly Bain

Executive Director,
Advancement Technology Solutions



WashU's Previous State

40+ year old homegrown system

60+ years of data locked in an on-prem database

Lots of manual work to enter or load and reconcile data from University systems and other sources



WashU's Current State

Salesforce + Advancement RM + MuleSoft + Data 360

16 active integrations (not including third-party solutions for which no integration development was needed)

Fully automated real-time, daily and weekly updates from critical University systems and third-party solutions





Challenge #1: Disconnected University Systems

Systems Providing Data

Student Information System (initially homegrown; now Workday Student)

- Imports done three times per year
- Extensive manual review and cleanup process after each import
- Messy data with many education records left open indefinitely
- No visibility into current student information for use in engaging with parents

HR Information System (Workday HCM)

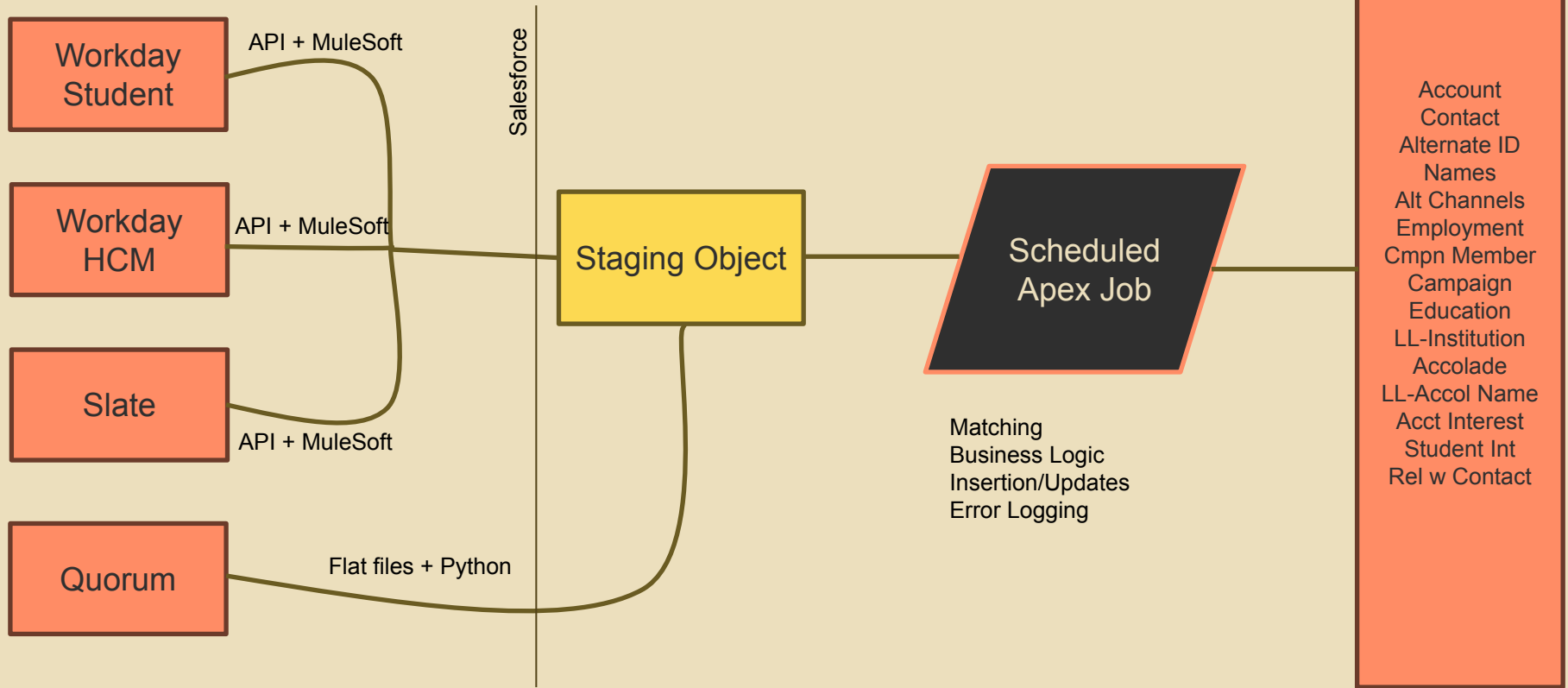
- No consistent update of faculty/staff information; files requested from HR for information needs

Undergraduate Admissions (Slate)

- Manual process consuming 6+ weeks of a staff member's time to prep data from several files for import

Grassroots Engagement (Quorum)

Flow of Data



Four Sources, One Codebase!

Many commonalities in data being consumed across these systems

- Accounts
- Contacts
- Alternate ID
- Alternate Channels
- Names
- Education
- Employment
- Campaign Member
- Relationships
- Student Interests

Approach to Matching

First attempt to match using all source-provided IDs against IDs stored in Alternate ID object. If that works, stop and use the record.

Then, see if the incoming record would trigger a duplicate rule if created:

- Duplicate rules must be active and set to Alert
- Allows for fuzzy matching, reducing the number of duplicate records]
- In Apex, create an instance of the object you're populating
- Set the fields you're using for matching
- Pass the record, or a List collection of records, into `Datacloud.FindDuplicates.findDuplicates` (Data Cloud not required!)
- Returns a List collection of type `Datacloud.FindDuplicatesResult`
- Iterate over those to get the matched records and return a List of sObject records
- Evaluate the List for contents and use the matched record found, or create a record

This approach works for all kinds of records in Salesforce, not just Contacts!

What About Failures?

MuleSoft import errors logged to Splunk

Summary email of MuleSoft processing after completion

Failures to write to Salesforce objects logged to custom error logging object



Wins



Created in FY26: 16,463 Contacts, 205,689 Alternate Channels, 46,808 Education records, 110,157 Relationships



Child student information available at a glance for fundraisers working with parents



Access to parents of incoming students as soon as deposits are paid for earlier research and assignment



New visibility into grassroots engagement, providing a new dimension in our understanding of our constituents' engagement and advocacy

Okay, but it's not perfect, right?



Perfection is the enemy of progress

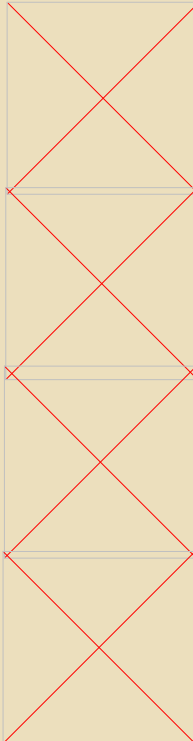
Human entry also is not perfect

Continuous improvement is the goal



Challenge #2: Grateful Patient Prospects in Spreadsheets

Before Process Revitalization



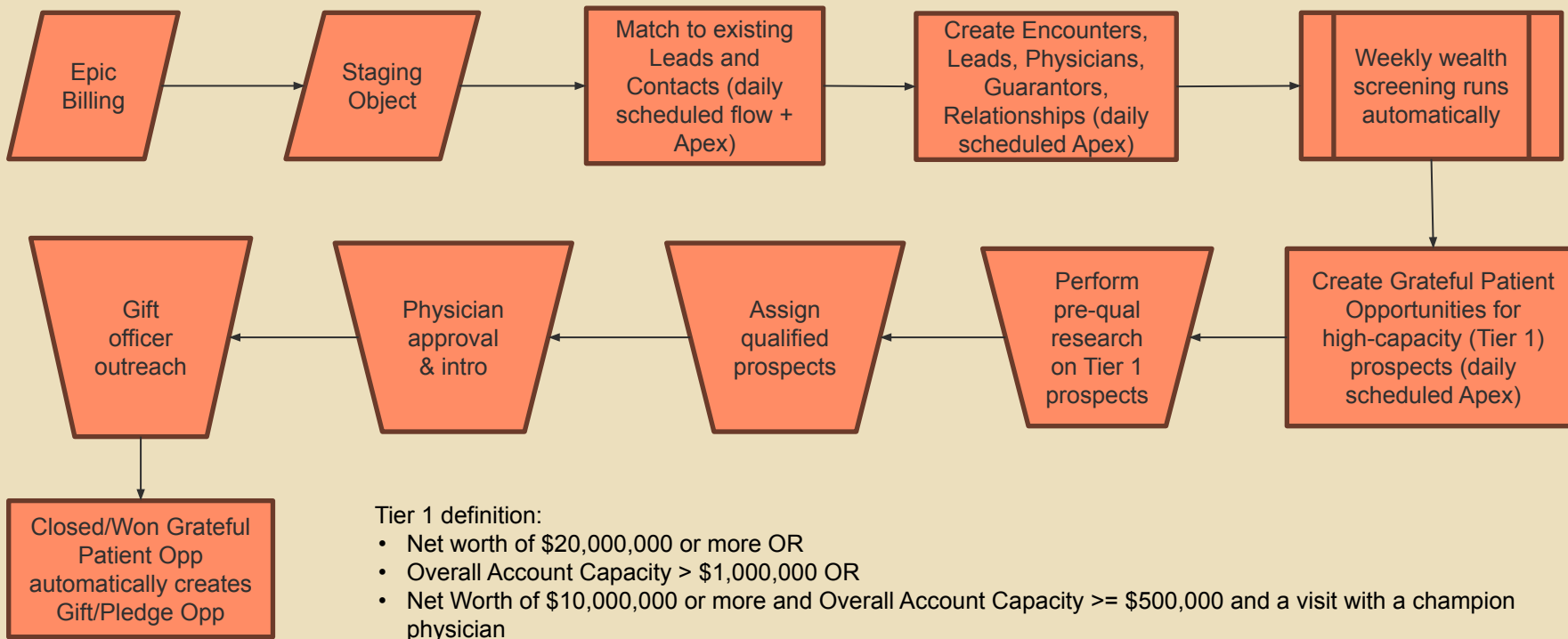
Grateful patient prospects assigned and tracked in spreadsheets

No way to keep up with identification based on capacity for the number of patients (averaging around 14,000 visits per day!)

No ability to identify which physicians are willing to help champion WashU causes

No understanding of the strength of relationships between patients and physicians, or families and physicians

Current Process



Example Grateful Patient Opportunity

Opportunity

GP

Start timer

Edit

Change Owner

Lead Source

Physician Referral

Opportunity Owner

Capacity

Windfall Capacity

\$0

Relationship Manager

>

✓

Faculty Approval

Faculty Introduction

Gift Officer Outreach

Closed

✓ Mark Stage as Complete

Details

Encounter Information

Team

Related

All Encounters

58 of 58 items

Physician Name	Division Name	Location of Service	Date of Service	Posted Date	Champion Faculty

Related List Quick Links

Opportunity Team (1)

Contact Roles (0)

Partners (0)

Opportunity Field History (1)

Products (0)

Notes & Attachments (0)

Show All (11)

Activity

Chatter

Filters: Within 2 months • All activities • Logged calls, Email, Calendar Events, List email, Tasks, and Web

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

To Do List

Recent Items

Chatter Feed

Wins



7,569 Grateful Patient Opportunities created in FY26



Grateful Patient Acquisition Program initiated for soliciting sub-Tier 1 prospects



Visibility into guarantor-patient relationships allows gift officers to see how whole families benefit from WashU medical care



Inclusion of guarantors of minor patients has opened up access to previously untapped population



Challenge #3: Disconnected Salesforce Orgs

State of Salesforce at WashU

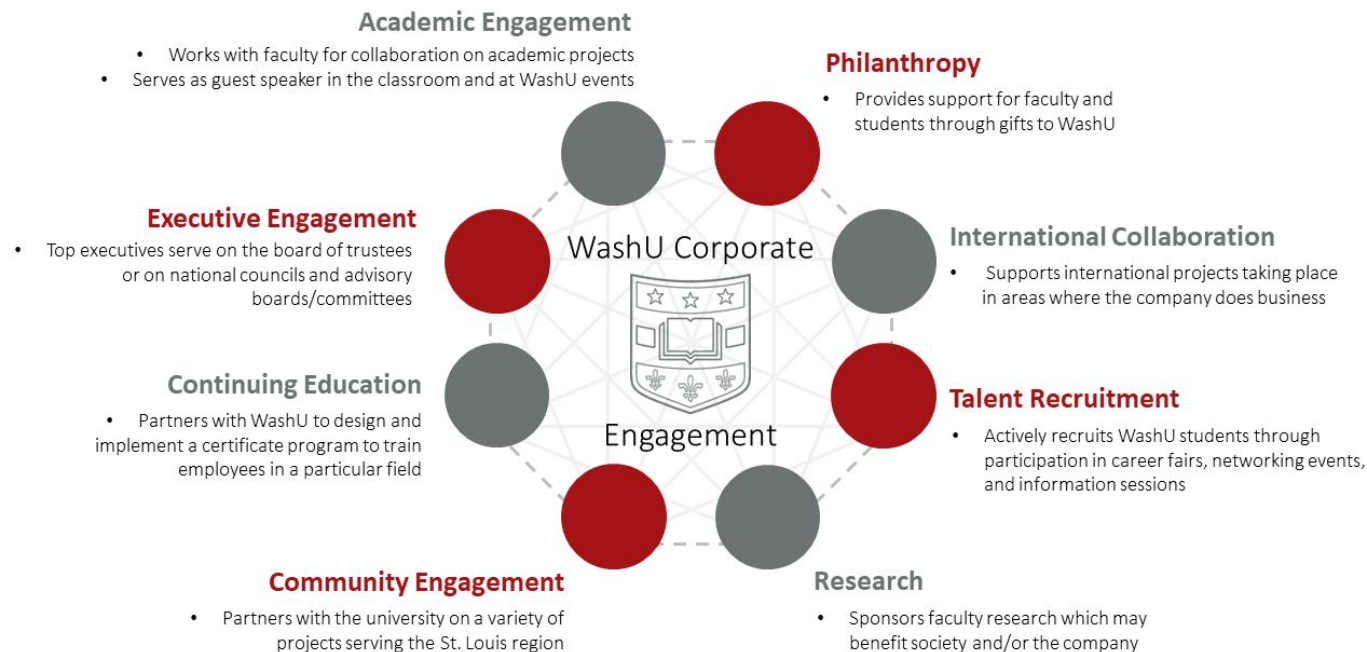
Multiple units made their own agreements with Salesforce for their own orgs

Redundant constituent data across multiple orgs

Engagement with people and organizations by individual units without cross-organization visibility



Corporate Engagement at WashU



Corporate Engagement Guiding Principles

Don't make hard what used to be easy

Transparency and sharing of data will be the norm

- All units will have a working knowledge of the other units engaged in corporate/industry relations so that each can help the others be more successful

All units will help each other to advance the mission of the university through corporate/industry relations:

- Prepare our students for success
- Provide resources (\$\$\$, data, relationship definition) for our faculty members
- Strengthen our region through workforce development, continuing/professional education, economic development, and community engagement

Align the mission of industry relations to the mission of the industrial partners

Corporate Engagement Guiding Principles

Cultivate and support an ecosystem that allows corporate entry points to originate at individual schools, but be supported by a central system, and vice versa

- Coordinated conversations – not necessarily one voice; clarity of contact
- Central coordination of top tier companies
- Business development is shared: central develops strategic partners; units focus on specific mission but sharing information across the group.

C-Suite leaders should be engaged broadly, not only as individual donors

Able to handle STL and not STL deeply but maybe differently

- Philanthropy dimension

Clarity of model with respect to tiers and company primary role(s) (partner, customer, employer)

How to bring together all these disparate orgs without completely disrupting business processes?



First Build: Sharing Data with Chancellor

- 1.1 Specific ARCH data should not be included in Data Cloud
- 1.2 Specific CCRM data should not be included in Data Cloud
- 2.1 Data Entered in ARCH by Principal Gifts Team Users
- 2.2 Need a way to make certain fields and records limited for viewing by only Principal Gifts team in ARCH
- 2.3 Remove Chancellor's CRM access from Principal Gifts Team users
- 2.4 Remove ARCH access from Chancellors' Office users
- 3.1 Addresses from ARCH need to be surfaced in the CCRM
- 3.2 Addresses from CCRM need to be surfaced in ARCH
- 3.3 Emails from ARCH need to be surfaced in the CCRM
- 3.4 Emails from CCRM need to be surfaced in ARCH
- 3.5 Phones from ARCH need to be surfaced in the CCRM
- 3.6 Phones from CCRM need to be surfaced in ARCH
- 3.7 If a user in CCRM updates a Trustee's Preferred Email, Preferred Phone Number, or Preferred Address, alert the Principal Gifts team in ARCH
- 4.1 ARCH Account ID field needs to be created and added to CCRM Accounts
- 4.11 ARCH Account ID field in CCRM should be updated from ARCH
- 5.1 ARCH Contact ID field (ADIS_ID__c) in CCRM should be updated from ARCH
- 5.2 Location field (Location__c) in CCRM should be updated from ARCH
- 5.3 Pronouns (ASL_Pronouns__c) - in CCRM need to be added/updated in ARCH
- 5.4 Pronouns (ARCH_Pronouns_Multi__c) - in ARCH need to be seen/updated in CCRM
- 5.5 Birthdate (Birthdate) - in CCRM need to be seen/updated in ARCH
- 5.6 Birthdate (Birthdate) - in ARCH need to be seen/updated in CCRM
- 5.7 Gender (hed__Gender__c) - in CCRM need to be seen/updated in ARCH
- 5.8 Gender (AQB__Gender__c) - in ARCH need to be seen/updated in CCRM
- 5.9 Race (hed__Race__c) - in CCRM need to be seen/updated in ARCH
- 5.10 Multi Ethnicity (AQB__MultiEthnicity__c) - in ARCH need to be seen/updated in CCRM
- 5.11 Parent (IsParent__c) - in CCRM need to be updated from ARCH
- 5.12 Alumni (IsAlumni__c) - in CCRM need to be updated from ARCH

First Build: Sharing Data with Chancellor

- 5.13 Other Preferences (AQB__OtherPreferences__c) in ARCH needs to be updated from CCRM
- 5.14 Total Lifetime Giving (Total_Lifetime_Giving__c) on Trustees in CCRM needs to be updated from ARCH
- 5.15 Surface Most Recent Gift/Pledge Date (AQB__MostRecentGiftDate__c) on Trustees in CCRM and update from ARCH
- 5.16 Remove Advancement Relationship Manager (Advancement_Relationship_Manager__c) on Contact in CCRM
- 5.17 Surface a related list view of Relationship Management Team (AQB__PMTeam__c) on CCRM Contacts
- 5.18 Preferred First Name in CCRM needs to be updated from ARCH.
- 6.1 An Alternate ID record should be created in ARCH when a matching Account is created in CCRM
- 6.2 An Alternate ID record should be created in ARCH when a matching Contact is created in CCRM
- 7.1 Opportunities from CCRM should be seen in ARCH
- 7.2 Opportunity Contact Roles should be seen in ARCH
- 8.1 Auto adding Contacts/Accounts in the CCRM when they exist in ARCH
- 8.2 All Contacts in ARCH with an active Relationship Management Team record with user of 'Momentum' must exist in the CCRM
- 9.1 Employment from ARCH should be seen in CCRM
- 10.1 Accolades from ARCH should be seen in CCRM
- 11.1 Event attendance from ARCH should be seen in CCRM
- 12.1 Event invitations from ARCH should be seen in CCRM
- 13.1 Volunteer information from ARCH should be seen in CCRM
- 14.1 All current trustee term details from CCRM should be seen in ARCH
- 14.2 Trustee Board Officer term details from CCRM should be seen in ARCH
- 15.1 Relationships (Relationships with Contacts object) from ARCH should be seen in CCRM
- 15.2 Affiliations (Account to Contact Relationships) from ARCH should be seen in CCRM
- 15.3 Need a way to know if Trustees' Spouse data does not match between ARCH and CCRM

First Build: Sharing Data with Chancellor

- 16.1 Expertise information from CCRM should be seen in ARCH
- 17.1 Education from ARCH should be seen in CCRM
- 18.1 Finalized, Honorary Degree information from CCRM should be seen in ARCH
- 19.1 Trustee must have a 100% match
- 19.2 Need to use multiple points of data to match on Non-Trustees
- 19.3 Need to use multiple points of data to match on CCRM Business Organization Accounts with ARCH Corporation &/or Organization Accounts
- 20.1 When a Contact is deceased in ARCH, that should update in CCRM
- 20.2 If the deceased Contact in CCRM has a living spouse, that Relationship record needs to be updated
- 20.3 When a Contact is deceased in CCRM, a Case needs to be triggered in ARCH
- 21.1 Activity Reports entered by UA should only be entered in 1 system (Trustee Activity Reports)
- 21.2 Non-Trustee Activity Reports in ARCH should be visible in CCRM
- 21.3 Briefing materials that PrG Team creates need to be tracked in the CCRM
- 22.1 Research Reference communications between the Chancellor's office to UA should be within each team's own org
- 23.1 Contacts that the ISLFSL team work with in CCRM need to be accessible to ARCH

Data Sharing with Chancellor's Office



No code needed to support the requirements listed on previous slides



Records are unified on ARCH Contact ID



Chancellor's Office has ability to search for records in ARCH when logged in to their org and create records in their org from ARCH records



No cost for Data 360 ingestion from Salesforce orgs



Agentforce and Agentforce Coworker can access data from both orgs



Salesforce reports can be developed in either org from both orgs' data



Data 360 allows viewing of data across orgs without import of data



Next up: Olin Business School's Salesforce org

Q&A

