



 [salesforce.org](https://www.salesforce.org)

Become a Connected Nonprofit

Unlock the Power of the Salesforce Platform



Introduction

The world is changing for nonprofits. Your organization's work is more necessary than ever, and there's more potential for creating impact.

Most nonprofits run on a variety of IT systems. Data usually lives in different places: emails, spreadsheets, databases, or on paper. This creates a barrier to gaining a complete picture of your constituents, programs, and impact.

Today, there is an opportunity to make use of technology that provides a single source of truth and empowers your entire organization with the real-time data they need to do their job and make a bigger impact.

You may have heard that many nonprofits are turning to technology that is based in the cloud to help them be more effective in program management, engagement, fundraising, analytics, and more. The benefits of cloud platforms are being seen across the social sector.

But first...
What is a cloud platform? Let's find out.



Contents



What is the Cloud? What is a Platform? What is a Cloud Platform?	4
Salesforce, a Platform for Impact	6
Beyond the Platform	8
Getting Started	9
Customer Success	10

What is the Cloud? What is a Platform? What is a Cloud Platform?

The cloud is a network of servers that provides an on-demand application.

Cloud computing is the concept of delivering software-as-a-service, or **SaaS**. This usually means that the software is accessed through a web browser, rather than through an application installed on your computer. All you need is an internet connection, and you can log in from anywhere.

You're most likely already using a number of cloud services in your personal and professional life, from Facebook to Amazon to Google Docs.

The opposite of cloud-based applications are called **on-premise**. Traditional on-premise software must be installed on your computer and accessed through a desktop application.

On-premise upgrades are manual and complex. When you factor in the high initial price to install, costly upgrades, and IT maintenance, it can get very expensive over time.

On the other hand, with the cloud, upgrades are automatic, you're always on the latest version, and you can easily add on or remove subscriptions based on what your organization needs.

A platform is a stage on which you can run your organization. Let's take your smartphone as an example of a platform. It comes with core functions like contacts, calendar, messages, and notes.

Salesforce was founded in 1999 with the vision of providing business software in the cloud, and has continued to be the leader. Salesforce.org has extended that vision to nonprofits around the world.



What's the World's Top Cloud Platform? Salesforce!

Salesforce allows you to manage and access your data in sophisticated ways that you could never do with a simple spreadsheet. Your records can be linked together to show how your data is related, so that you can see the big picture. Salesforce has a set of core capabilities like contacts, accounts, campaigns, and reports to help you track what's important.

Some might think Salesforce is CRM, or Constituent Relationship Management only – a place to store your constituent data. But Salesforce is also a platform that allows you to build on top of that data, turning it into action. It's not just a donor rolodex, but a complete fundraising platform. It's not just a client database, but a program management platform. It stores your data, but also provides the tools to engage, analyze, and manage your entire organization.

Salesforce.org takes the world's #1 CRM and reimagines it for nonprofits. Nonprofit Cloud provides an integrated platform to transform digitally for the new normal and sustain your mission for the future

By standardizing on a single platform, nonprofits are finally achieving the coveted 360-degree view of their organization. By unifying your Fundraising, Marketing and Engagement, Program Management and Grantmaking teams organizations can deliver experiences that surpass the expectations of today's digital stakeholders and drive next level change and impact.

Platforms give you the flexibility to mold their functionality to your needs to support virtually any process you can imagine. Salesforce also gives you the capability to extend the platform with custom fields, objects, reports, branding, and apps from the AppExchange. That's why so many different kinds of nonprofits have been able to use Salesforce to achieve game-changing results.

Five benefits of moving to a cloud platform



Single Source of Truth

Seamless integration
Unified platform for your whole staff



Intelligence

Real-time reporting & analytics
Data-driven insights



Fast Time to Value

Faster deployment & scale
Automation



Productivity & Agility

Drag-and-drop tools
Collaboration



Mobility

Access data anywhere at anytime
Mobile-first apps





Salesforce, a Platform for impact.

Over 40,000 nonprofits use Salesforce, from a large foundation managing grantmaking and AIDS prevention programs across the African continent, to local community-based charities running volunteer events and processing in-kind donations. How can the same tool span the needs of nonprofits across such different sectors, budgets, missions, and structures?

Let's take a look at how the Salesforce platform can help you make an impact!

Start with a Strong Foundation...

And Use Purpose-Built Solutions Within Nonprofit Cloud:

The Nonprofit Success Pack (NPSP) was built for, and with, our community of over 40,000 nonprofits, with out-of-the-box capabilities and a relationship-first view of all the people in your universe. Free and open source, it turns the #1 CRM for businesses into a Constituent Relationship Management system for nonprofits.

Create Donor-Centric Experiences with Nonprofit Cloud for Fundraising:

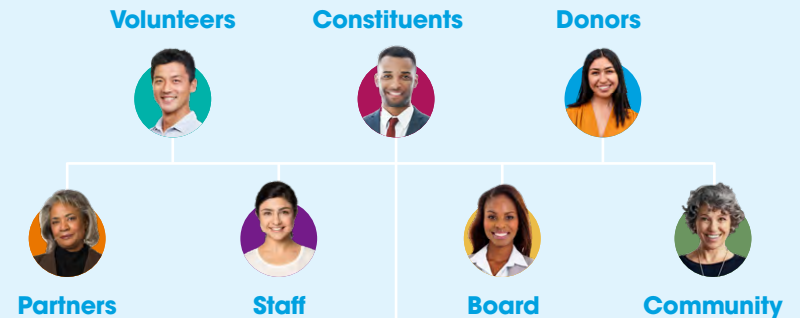
Your donors and funders expect you to engage with them in meaningful ways, similar to their digital experiences as consumers. Our fundraising solution puts people first - to help you build seamless and enduring relationships with all your constituents.

Find and Engage Lifelong Supporters with Nonprofit Cloud for Marketing & Engagement:

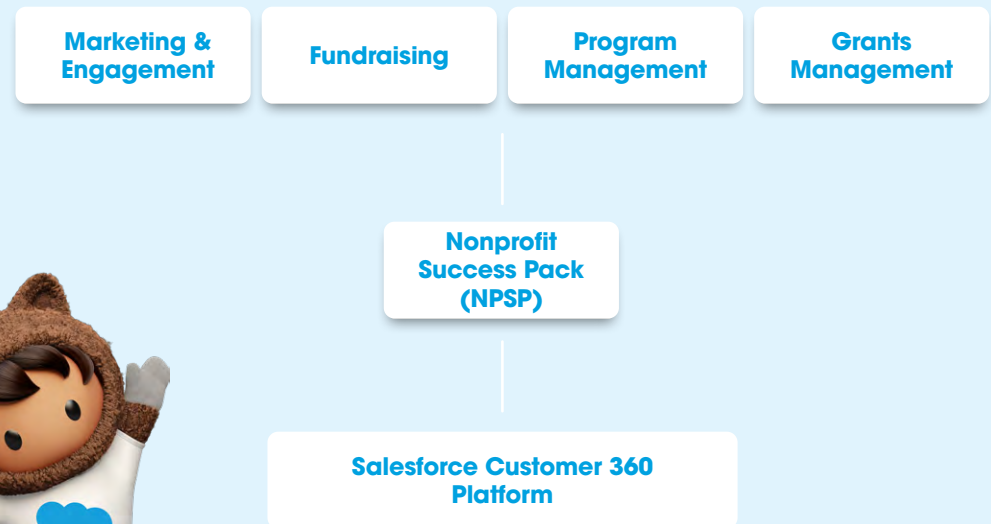
As a nonprofit, nothing is more important than being able to connect with the right people. In this day and age, there are a growing number of channels and touchpoints to master in order to reach the right audience. With our platform, it's easy to use data to make every message more powerful and personalized.



Nonprofit Cloud



Nonprofit Solutions





Amplify Your Program Impact with Nonprofit Cloud for Program

Management: Nonprofit Cloud enables organizations to measure and manage their programs more effectively. Program Directors can better understand which initiatives or interventions are most successful, adjust services to better fit clients' needs, and quickly define and create new programs. Nonprofit staff, the people they serve, and the donors that support their work deserve better program management tools than paper and spreadsheets.

Simplify and Accelerate Grantmaking with Grants Management:

Our Grantmaking solution helps grantmakers engage with grantees on a platform that gives them the ability to create a grantee portal to share funding opportunities, send invitations for private grants and make it easier for grantees to apply for funding and send outcomes.

The Salesforce AppExchange: With more than 1,700 partner apps and 3 million installs to date, the Salesforce's AppExchange is the world's leading marketplace for business apps, including dozens of apps built just for nonprofits. Now you can add on functionality in just a few clicks, like peer-to-peer fundraising and document generation, or integrate external apps you're using like Eventbrite or Dropbox.

Beyond the Platform

When you're part of the Salesforce.org community, you're never alone. It's about more than a technology platform – we're a community-driven movement.

When you activate your Salesforce subscriptions, you also get access to The **Power Of Us Hub** – a one-stop resource center and online community of over 40,000 nonprofit Salesforce users, where you'll find training, documentation, and resources. There, you can engage with your peers, community MVPs, Salesforce.org employees, and partners.

Trailhead is the fun, free way to learn Salesforce. With hundreds of modules covering virtually every part of the platform, you and your staff can become Salesforce experts in no time.

Our **Partner Ecosystem** is made up of dozens of organizations that are platform specialists and consultants, all ready to help you get started and customize Salesforce to your needs. We certify partners in our Partner Program, so that you know you're working with a trusted expert.

We offer a variety of **Success Plans & Services**, such as Premier Success, which gives you 24x7 access to Salesforce experts. We also offer Accelerators, Customer Success Architects, and other paid services.

What is Salesforce.org? Salesforce.org is a social impact center of Salesforce focused on partnering with the global community to tackle the world's biggest problems. We believe that technology, when used for good, can transform the world. We equip nonprofit organizations with powerful technology to help them operate effectively, raise funds, and connect. As the world's problems continue to escalate, together, we can close the gap between the impact created today, and the potential for impact in the future. Our purpose-driven technology is built for, and with, the community. Our partnerships increase the capacity for social innovation. By combining technology, community and partnership we can close the impact gap.



Customer Success



Little Kids Rock brings instruments, curriculum, and training programs to public schools. With Salesforce, Little Kids Rock manages thousands of donor relationships and all of their fundraising efforts, from one-time online donations and major donor events to crowdfunding campaigns and auctions. Since implementing Salesforce, LKR has increased fundraising by more than \$4.5M.



omprakash

Omprakash works at the intersection of technology, higher education, and international development to create mutually beneficial relationships, dialogue and learning between individuals and grassroots social impact organizations. Using the Salesforce Platform, Omprakash is able to track user activity, send automated emails, power their online learning platform, and manage internal reporting and communications within their admin team.



The National Aquarium champions environmental initiatives by engaging visitors, volunteers, students and global citizens to actively participate in the conservation and preservation of natural resources and ecosystems. Staff use Salesforce to prospect donors and track proposal activities.



The USO PathfinderSM program serves thousands of transitioning service members and their families by offering the highest quality of transition services to meet the broadest spectrum of needs. It uses NPSP to provide each team member with a 360-degree view of the program's clients, partners, and teams across the nation. USO Pathfinder also built a full mobile responsive app on Heroku called the Action Plan App. Service members now have access to their Action Plans in real-time with the ability to chat with their Scout directly in the app, complete tasks, and track progress towards their goal. The program manages USO Pathfinder's thousands of partners who provide resources that help service members and their families successfully transition from military life to thriving Veteran status directly within NPSP. For more information, visit uso.org/pathfinder.

“Salesforce has been the organizational nerve center for Little Kids Rock. We use it in virtually every aspect of our work.”

Dave Wish, Founder and CEO, Little Kids Rock

“We assume that every organizational challenge that we have, can and should be solved by Salesforce.”

Willy Oppenheim, Executive Director & Founder, Omprakash



GETTING STARTED

Are You Ready to Use the Salesforce Platform?

Do you have a complete view of your constituents?

- Have you moved off of paper and spreadsheets for tracking donor and constituent data?
- Can you quickly pull up an individual's record and see their entire donation, volunteer, program participation, and engagement history?
- Bonus points: Can you do this on a mobile device?

Do you have an integrated platform?

- Is your fundraising, marketing and programs data tracked in the same system?
- Is it easy for staff to run reports and access data?
- Bonus points: Does end-of-year reporting take you less than a month?

Do you have a platform strategy?

- Do you have a system of record that is a reliable "single source of truth?"
- Do you have an org-wide CRM strategy?
- Bonus points: Are your leaders and board bought into it?



Keep in mind three important ideas as you're starting your journey over to the Salesforce platform:

1

Align across the organization

Ensure that important stakeholders understand the value of the platform. Having an advocate can help - whether it's a board member that has experience with cloud platforms, a member of your technical staff that has done an implementation before, or someone on your leadership team that has had positive experience with changing to adapt to technology.

2

Develop a culture of embracing data as a source of intelligence

By being a Connected Nonprofit you gain a full view into your organization which means your impact and insights can be data-driven.

3

Cater to the user experience

Understanding your users, understanding how they work with information, and understanding the objectives they have will be crucial to designing a platform that ultimately furthers your mission.



If you haven't checked any of the boxes on the previous page, it may be time to get on the Salesforce platform!

Nonprofits of every shape and size, dedicated to all sorts of causes, are using Salesforce to connect their organizations and power their missions. In today's connected world, it is more important than ever to run your nonprofit on a single platform.

By becoming a Connected Nonprofit, moving to a single platform through thoughtful decision making and collaboration can help you make more impact than ever, in a whole new way.

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