

Nonprofit Montgomery ICYMI From Spreadsheets to Salesforce

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Presenter: Alex Scott of [Harmoniee CRM Solutions](#)



WHAT IS SALESFORCE?

- Salesforce is a cloud-based Customer Relationship Management (CRM) system that gives you 360-degree of your constituents.
- The Non-Profit Success Pack (NPSP) is an app installed on the Salesforce platform. The app unlocks additional functionality for easy fundraising, program management, and volunteer management.

EXCEL VS SALESFORCE

- Excel and Salesforce are similar as they track data. However, Salesforce is much more powerful than Excel as it allows you to view related data items to records and allows automated workflow processes (such as email alerts and update d Similarities are below:
- ROWS in a spreadsheet = RECORDS in Salesforce
- COLUMNS in a spreadsheet = FIELDS in Salesforce
- SHEETS in a spreadsheet = OBJECTS in Salesforce

DATA CHALLENGES NONPROFITS FACE

#1: NO FULL PICTURE OF CONSTITUENT INTERACTIONS

- **Salesforce Solution:** Activity Timelines and Campaigns
- **Why Should I Care?** Reaching out to contacts who have gone cold

#2: NOT SURE WHO DONATED AND WHEN

- **Salesforce Solution:** Use Opportunities to track fundraising efforts
- **Why Should I Care?** Allows you to target people who have donated in the past but not recently to boost funding

#3: GRANT MANAGEMENT IS OVERWHELMING

- **Salesforce Solution:** Track all grant information in Opportunities
- **Why Should I Care?** Stay on top of grants to ensure funding sources aren't lost

#4: REPORTS TAKE FOREVER TO CREATE

- **Salesforce Solution:** Report Builder & Dashboards
- **Why Should I Care?** Save time with dynamic reports for board and funder requests

HOW MUCH DOES IT COST?

- Salesforce NPSP is FREE for 501(c)(3)s – up to the first 10 users. Then it's only \$420/year for each additional user.

WHAT ARE THE NEXT STEPS

- Salesforce Implementation
 - Usually takes around 4 weeks to complete
 - Requires customization to fit your business needs
 - Certified Salesforce Consultant is recommended

- Salesforce On-Going Support
 - Bring on a consultant to assist in your organization in the following tasks
 - Administration: Customization, data deduplication and cleansing, and create reports and dashboards, and troubleshooting
 - Training: Develop and implement training for users, keep materials up-to-date, and communicate future releases and enhancements

For any additional questions on Salesforce implementation or training for your organization, please contact Alex Scott from Harmoniee CRM Solutions (alex@harmoniee.com | #202.999.7395)