



salesforce.org
nonprofit
cloud



DATA SHEET

NONPROFIT CLOUD FOR FUNDRAISING



Nonprofit Cloud is a Constituent Relationship Management (CRM) system that helps you to track everything about your donors and connect with constituents from one place, to help your teams create a better supporter experience.

It combines the #1 CRM with the Nonprofit Success Pack (NPSP), which customizes the CRM for nonprofits, to help you optimize your supporter journey from cultivation through stewardship by capturing, organizing and presenting data in effective ways. Here are just a few ways it can help you now, or later on:

- Your major gift officers will be more productive with a modern, mobile CRM
- Your marketing teams can segment and craft highly personalized appeals
- Programs teams can share transparent impact reports for specific funders
- Leadership can gain full visibility into revenue and staff performance
- Technology teams can drive more innovation and automation across your mission

Regardless of who your supporters are, or where you get your income, Nonprofit Cloud will empower your nonprofit to easily capture data, build relationships, and gain visibility into your community. This document is an overview of how Nonprofit Cloud for Fundraising can help your organization better connect with your supporters and build relationships that fund your mission.

SUPPORT COMES FROM MANY PLACES



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THE IMPORTANCE OF MEANINGFUL SUPPORTER EXPERIENCES

We are fortunate to work with thousands of nonprofits across the globe, of every size and cause area, that raise funds for their mission in many different ways. These nonprofits work every day to build strong, lasting relationships with supporters. Development and marketing professionals who nurture these relationships through meaningful experiences with their mission.

Think about the experiences you create for your mission. They could be:

- Initiated by anyone - from internal teams, to board members, to beneficiaries
- Take the form of a meeting, event, email, post or well placed digital ad
- Occur when you don't even know, hidden in the connections of your community

Many times software fails to facilitate these personal experiences for supporters. Rather than working to connect staff and supporters, it can get in the way.

At Salesforce, we believe that **technology should be your next big supporter.**

READ OUR LATEST EBOOK

Donor-Centric Fundraising
*A guide to meeting donor needs
and expectations*

READ NOW

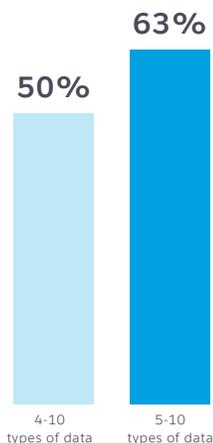


DATA-DRIVEN FUNDRAISING

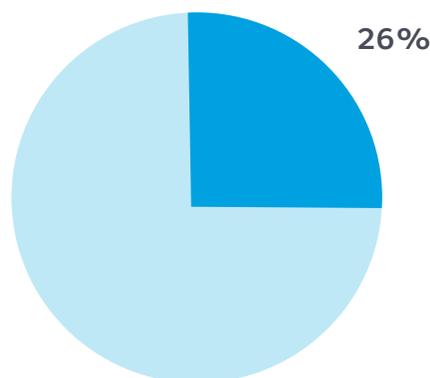
Our most successful customers build a foundation for their relationships with good data about their supporters. In today's digital world nonprofits need this consolidated data to have a full "truth" of who your supporter is, who they want to be, and why they give to your mission. Take a minute to think about the value of your constituent data.

- Your supporter interests help you inspire them to click "donate" from an email
- Donor preferences and history suggest how to connect and communicate
- Constituent relationships help you bring more people in to give

The tens of thousands of nonprofits that partner with Salesforce for their fundraising, engagement and programs technology do so because they have a vision for gaining that full truth about their supporters, and also believe their employees deserve modern, intuitive technology. They leverage our technology, as well as our ecosystem of partners, to supercharge their strategies and raise more resources.



% of nonprofits that exceeded fundraising goals



Based on our 2019 Fundraising Productivity Study, we know good data actually correlates to fundraising success. For example, nonprofits who captured more types of data more frequently exceeded their fundraising goals.

The challenge, however, is that respondents of this survey shared that good data is still a work in progress for most nonprofits, with only **26% considering their data quality good.**

[DOWNLOAD THE 2019 FUNDRAISING PRODUCTIVITY REPORT HERE](#)

NONPROFIT CLOUD INNOVATION

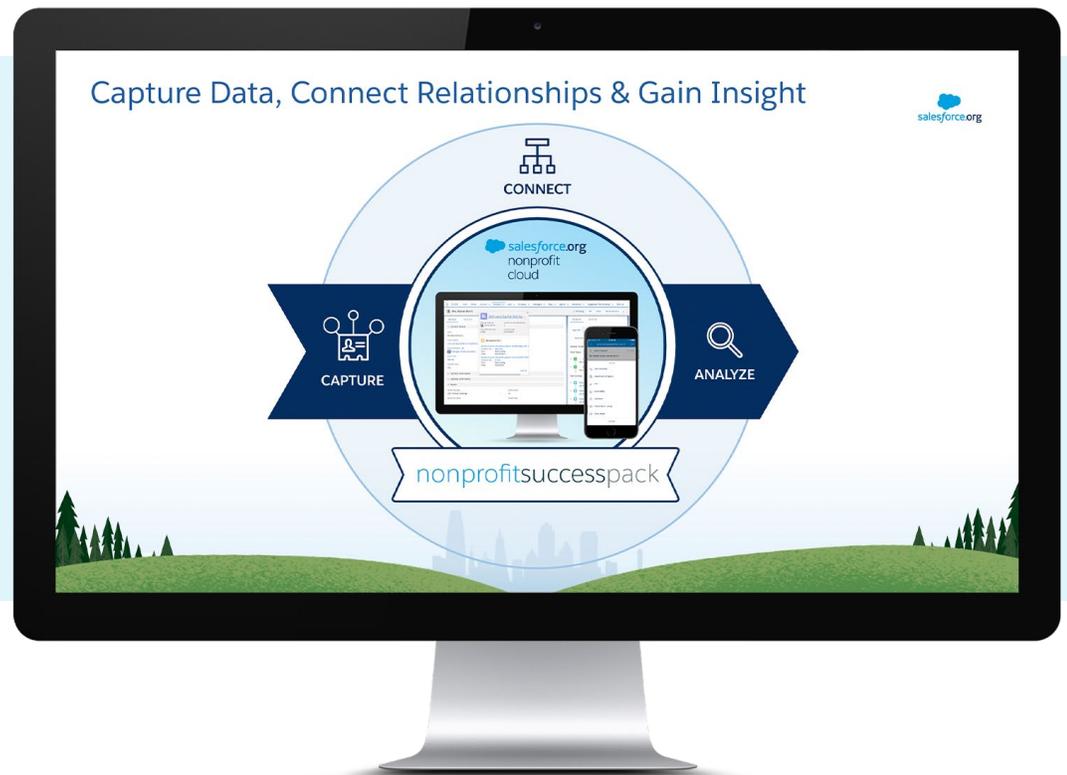
BATCH DATA IMPORT (BDI)

We know you get data from a lot of sources such as caging facilities, street canvassers, and more. With Batch Data Import, you can quickly and easily import complex data from spreadsheets into the CRM. We have also added new advanced data mapping capabilities to quickly and easily import complex data from files into the CRM with a minimal amount setup and data manipulation

WATCH OUR WEBINAR

Data-Driven Fundraising

WATCH NOW



DONOR RELATIONSHIP & MODERN MOVES MANAGEMENT

Salesforce helps you track supporters, with all of this data managed in one place, to help you determine how to foster relationships.

- Constituent profiles provide a 360-degree view of your supporters and all Activities whether that be a phone call, email, meeting, or anything else you want to track
- Households and organization affiliations manage relationships with families and employers
- Donor types help you segment your donor database how you think about them
- Levels further group supporters based on their level of commitment, such as total gifts or number of hours volunteered
- Engagement Plans help you tailor and automate moves management strategy based on types, levels or any other data with proven steps and tasks associated

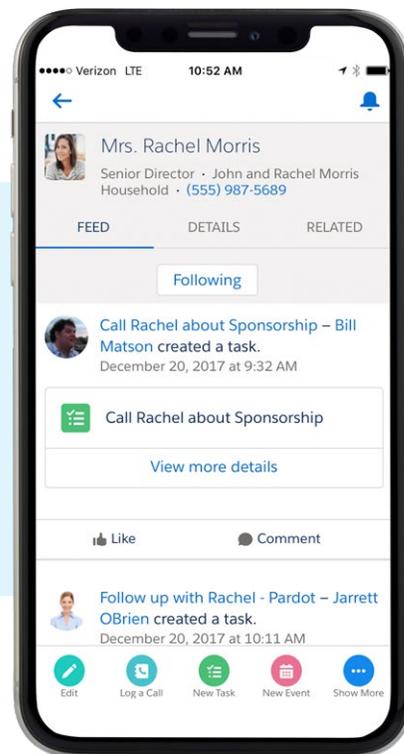
VALUE OF DONOR RELATIONSHIP MANAGEMENT

Nonprofits who use Salesforce for Fundraising reported they on average **acquired 39% more donors** and retained 31% more.

WATCH OUR DEMO

Marketing & Fundraising

WATCH NOW



NONPROFIT CLOUD INNOVATION

[SALESFORCE INBOX](#)

Integrate your CRM and staff productivity directly into email clients and drive productivity from any device. Salesforce Inbox boosts major gift officer productivity by leveraging email templates, scheduling meetings, entering gifts, eliminating manual data entry, and even creating contacts from Gmail or Outlook.

[SALESFORCE MAPS](#)

Visualize household addresses to understand areas of opportunity or optimize routes to meet with your most important supporters.

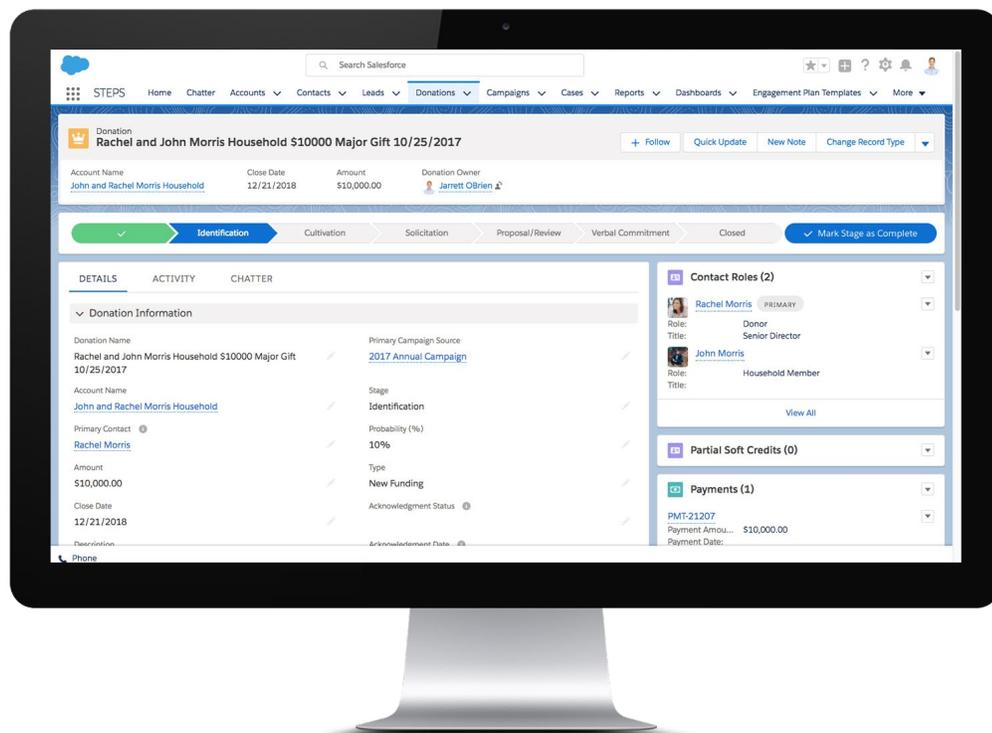


END-TO-END DONATION & INCOME MANAGEMENT

Funds are the lifeblood of achieving your nonprofit's mission. Nonprofit Cloud empowers your organization to capture all your data on income in one place, related to supporter information. With real-time access to your paid and pledged donations from any device, development staff and leadership can be more productive at focusing on donations with the highest likelihood of closing.

Many nonprofits today are trying to diversify revenue streams. With Nonprofit Cloud you can measure any income such as earned income, grants, and memberships, providing a complete view of where your funds are coming from and where to focus fundraising efforts.

- Configure donation types help you easily manage one-time donations, recurring donations, in-kind gifts, grants, earned income, memberships, and other revenue types
- Set up donation stages and paths help you understand where revenue is at every stage, with guides to reinforce proven steps from cultivation through stewardship
- Visualize and interact with forecasts by stage or probabilities to better understand donation or grant opportunities.
- Organization affiliations, automation of communications/tasks, and automated soft credits drive productivity in gaining that next corporate match



VALUE OF DONATION & INCOME MANAGEMENT

Nonprofits who use Salesforce for Fundraising reported they on average **increased donations by 49%**.

NONPROFIT CLOUD INNOVATION

Available Spring 2020

BATCH GIFT ENTRY

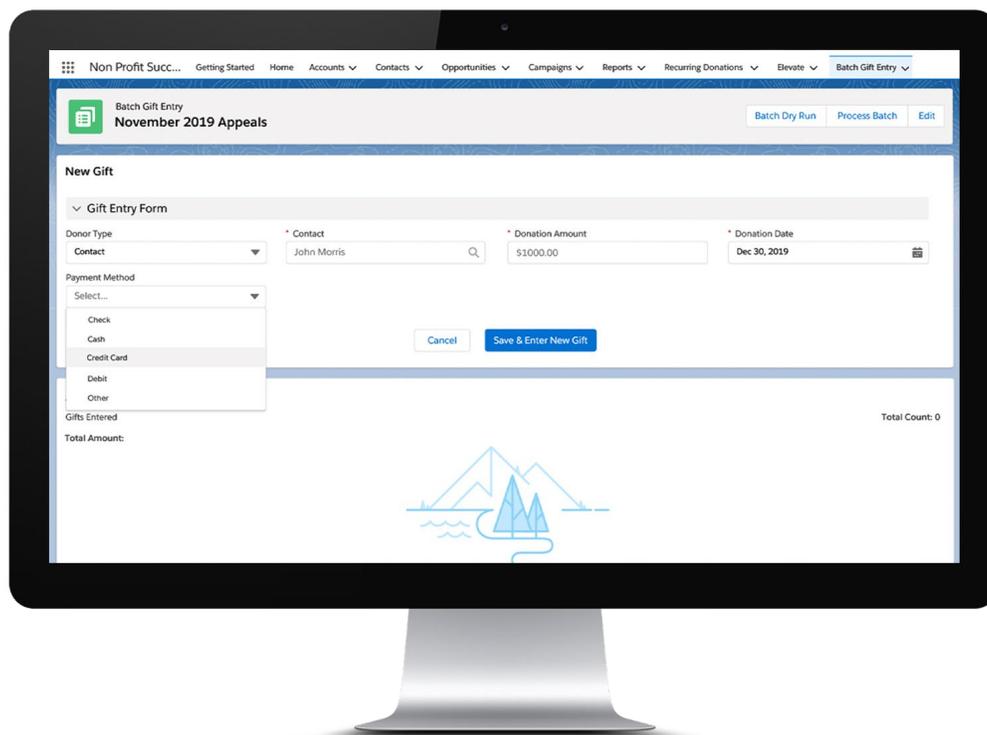
Enter gifts more productively with an intuitive interface and the ability to enter checks, credit cards, stock, even pledges in bulk. In early 2020 nonprofits will also be able to Add and relate critical data including soft credits and allocations for split gifts. Administrators can also create complex, customizable templates to make gift entry quick and easy for your end users - either in batch or for entering single gifts.

SUBLEDGER INTEGRATION

We are building capabilities to make it easier to prepare all your donation data for your financial systems, configured to your financial reporting requirements to reconcile all this revenue, processing multi-year gifts, allocations, and more.

ENHANCED RECURRING DONATIONS

Nonprofits need sophisticated ways to track and manage sustainer revenue. Our enhanced capabilities will create an easy to use experience, allow more flexibility for nonprofits to manage their most committed supporters, and provide key reports for forecasting revenue.



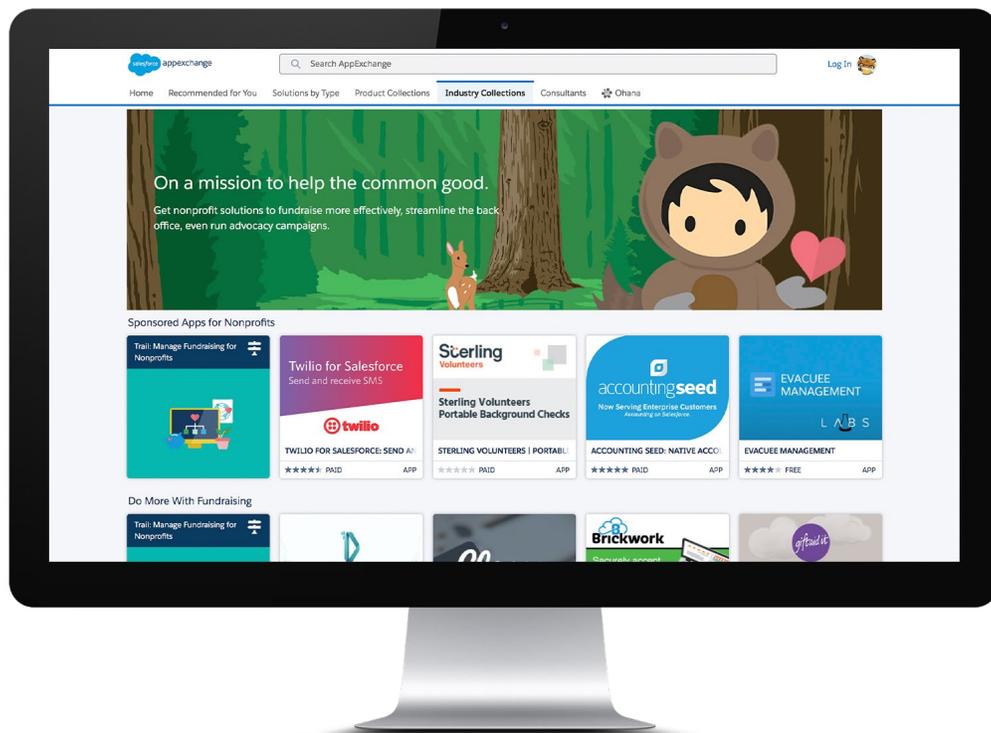
*Actual display may vary.

MODERN DIGITAL FUNDRAISING

As fundraising efforts increasingly shift to younger generations, many nonprofits are focusing their efforts on digital and online fundraising efforts. The Nonprofit Success Pack has out of the box capabilities to manage digital donors and connects to an entire ecosystem of digital fundraising tools on the [AppExchange](#) to help you with online, peer to peer, and ticketing revenue.

Tap into modern fundraising capabilities that allow you to acquire and convert new donors at less cost and effort. Leverage the AppExchange to download integrated digital fundraising platforms and ensure all data passes through to CRM.

- Seamlessly track data on campaigns, donors, single donations, recurring donations, teams, registrations and tickets from digital fundraising apps
- Create responsive online donation forms and track donations to constituent and household records
- Use modern, integrated peer 2 peer fundraising technologies and associate members to campaigns in CRM
- Search a directory of other tools for ticketing, text to give, membership, form, payments and many other digital tools
- Build or integrate your own apps via our Application Programmer Interfaces (API's) or on our engineering platform Heroku.



VALUE OF DIGITAL FUNDRAISING

[buildOn](#) increased online giving by **130%** with the Nonprofit Success Pack, Community Cloud, and our software partner for peer-to-peer giving, Classy.

WATCH OUR WEBINAR

Building Great Supporter Experiences

WATCH NOW



NONPROFIT CLOUD INNOVATION

Coming Spring 2020

GIVING PAGES

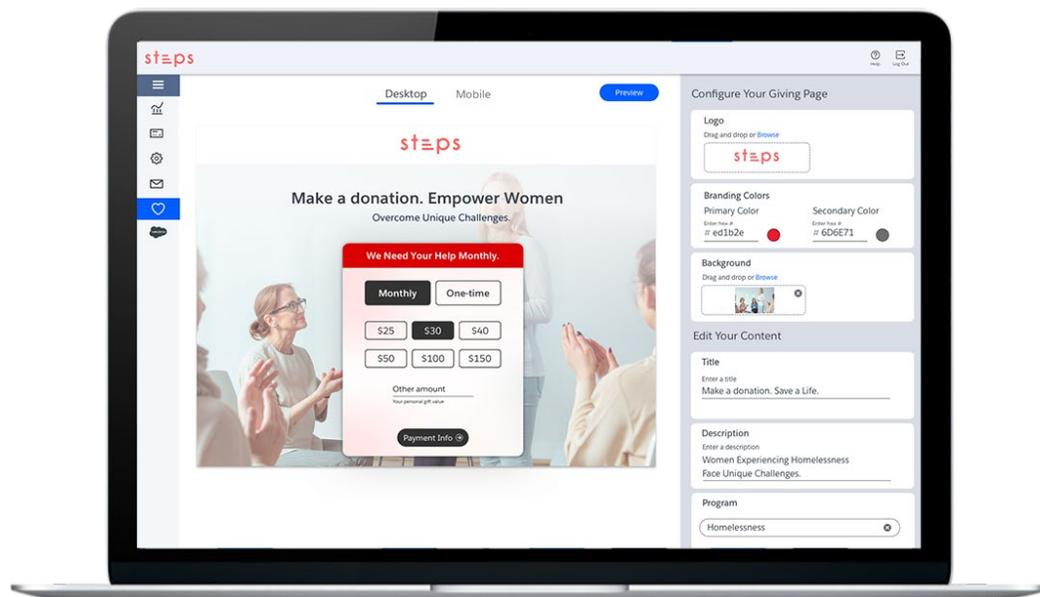
Easily create an out-of-the-box donation form that integrates into your online presence by conforming to your brand and configuration needs, with the ability to apply a custom or vanity domain.

ENGAGEMENT HUB

Create a supporter hub that helps you engage your donors in giving and volunteering activities for your nonprofit, or raise money collectively across multiple disparate nonprofits in response to a community need or regional giving day.

SALESFORCE.ORG PAYMENT SERVICES

Easily connect to your payment provider to manage payments, grow your sustainers, and provide greater transparency.



OMNI-CHANNEL MARKETING & ENGAGEMENT

Today's supporter wants to be engaged on their terms in highly personalized, meaningful communications and experiences, similar to when they purchase from leading brands as consumers.

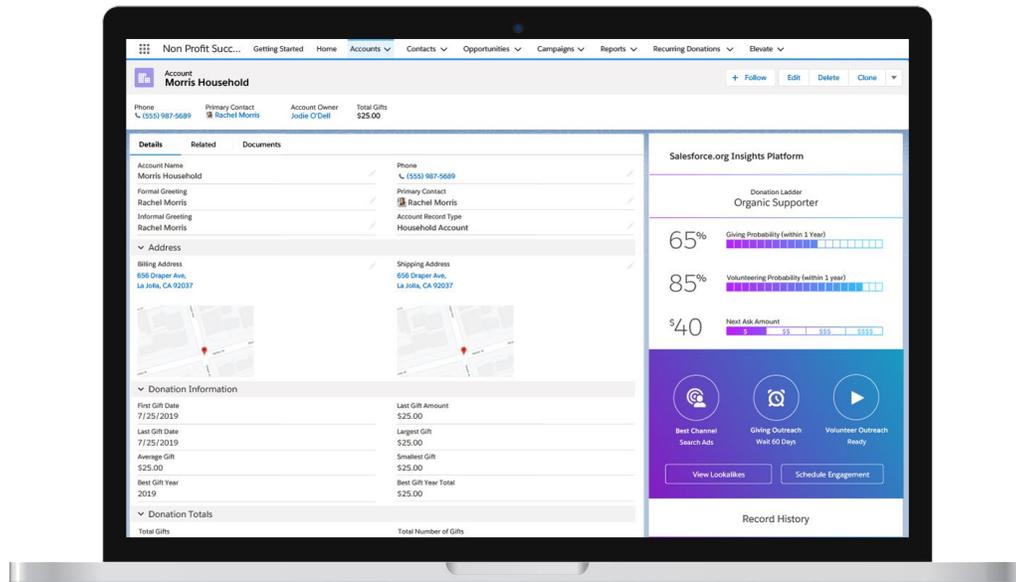
With Nonprofit Cloud, engagement on any channel is fully integrated to CRM data to craft highly personalized and timed messages that get people to act, and automatically set tasks for development staff when supporters hit certain engagement levels.

Leverage fully integrated omnichannel marketing tools that drive engagement and conversion.

- Build compelling landing pages, forms, and emails that boost your pipeline with quality prospects and analyze who's visiting them, without the need for IT help
- Use scoring and lists to better segment and know your supporters based on their clicks and behavior
- Leverage dynamic content to personalize emails from CRM data to different segments, with no additional work
- Create supporter journeys that automate these timely communications which are received, opened, and converted at a higher rate, increasing donations
- Craft highly targeted direct mail appeals and campaigns, at lower and better results
- Use Social Studio to listen, schedule, and post updates to your various accounts across social channels, while gathering insights on clicks, comments, and likes
- Use Advertising Studio to help shape your donor acquisition to build audiences, place ads and capture across dozens of channels
- Connect donors and supporters to a digital community for self-service and support

VALUE OF OMNI-CHANNEL MARKETING

Nonprofits who use Salesforce for Fundraising reported they on average **increased donor engagement by 54%**.



NONPROFIT CLOUD INNOVATION

Available Summer 2020

Improve constituent household data based on configurable data matching and merging logic. Highlight areas to raise more money with instant recommendations based on your data and fundraising performance metrics. Scale personalized fundraising with powerful segmentation in direct mail and digital channels.

ANALYTICS & ARTIFICIAL INTELLIGENCE (AI)

Nonprofits who have data at their fingertips to drive the right decision or next outreach are paving a modern approach to drive fundraising performance.

Leverage powerful reports, dashboards, analytics, and even Artificial Intelligence from any device. With one trusted view of data, your fundraising leaders and even board members will be able to better connect to the right metric that drives your decisions.

- Gain a 360 view of your supporter across development, and teams involved in fundraising such as leadership and programs
- Tracks inputs, outcomes and impact and shares personalized reports with funders
- Create transparency in past, current and even future income with the ability to predict revenue challenges or spot new fundraising opportunities
- Use powerful analytics integrated to Google Analytics to optimize your campaigns and use metrics to maximize the return from every outreach
- Harness AI to assist you in your day-to-day. Predict a donor's propensity to give, identify your next best action to take, scale service with chatbots or visualize trends in revenue with analytics



NONPROFIT CLOUD INNOVATION

FUNDRAISING PERFORMANCE APP

Einstein Analytics has a new app for nonprofit fundraising leaders to help you gain a better understanding of how your key performance indicators and metrics are trending over time.

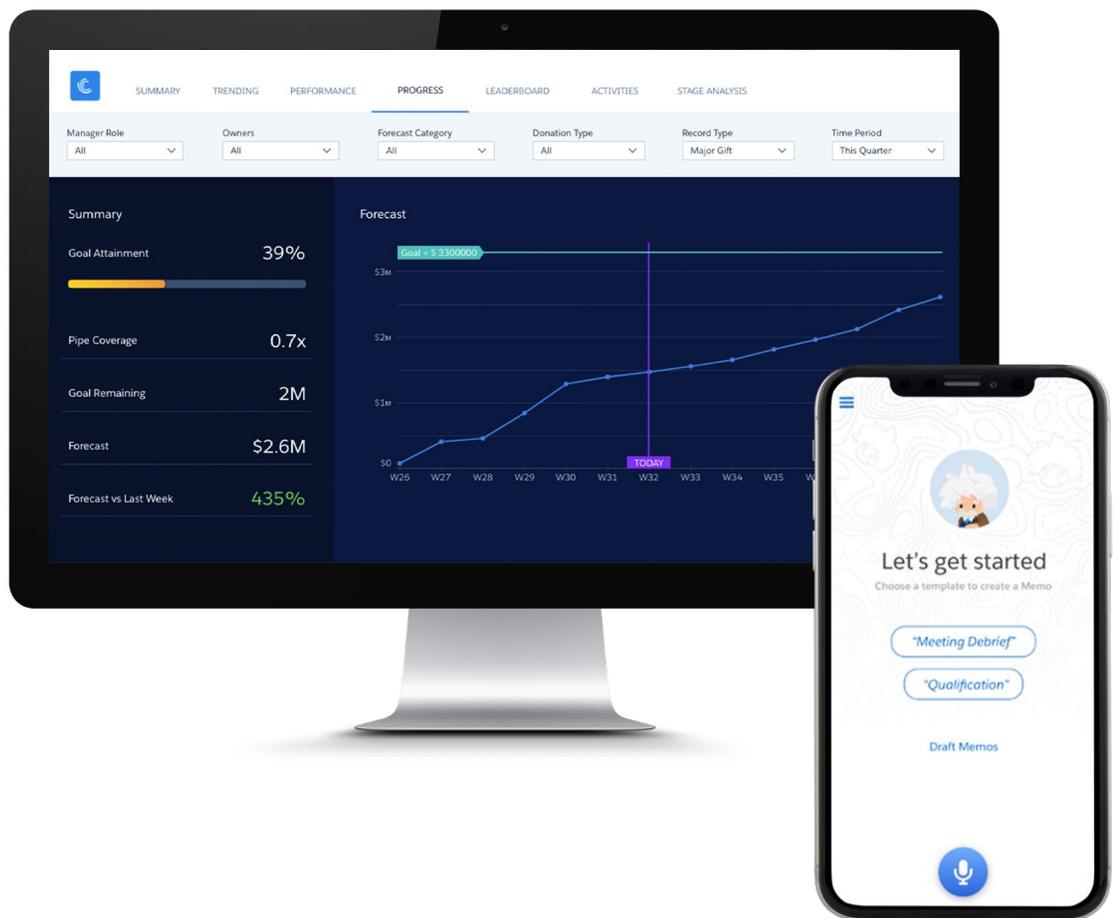
PREDICTION BUILDER

Predict outcomes, such as supporter churn or lifetime value. Create custom AI models on any Salesforce field or object with clicks, not code.

EINSTEIN VOICE ASSISTANT

Spring/Summer 2020

Automatically capture notes, update constituent records, and relate information to CRM data using nothing but your voice via natural language processing, just like your phone.



SUCCESS WITH SALESFORCE

Nonprofits partner with Salesforce to be on the cutting edge of technology, however, they also realize that they sometimes need help creating a technology vision, managing change, and driving adoption of this technology.

Salesforce has an entire team internally, along with an ecosystem, that can help you make your dreams a reality, including:

- The [Power of Us Hub](#) is a community of over 40,000 nonprofit members that 98% of the time answer each other's questions within 24 hours
- [Nonprofit User Groups](#) help connect digitally and in-person with your peers locally
- Trailhead ensures every staff member is up to speed on Salesforce products with thousands of nonprofit, product, tech and professional training and testing modules
- Every nonprofit gets a Standard Success Plan with online guidance, support, and training
- [Premier Success offers](#) provides additional support with 1-on-1 accelerator sessions, Circles of success gatherings, Expert advice on-demand, and faster support response times
- Leverage Customer Success Architects to augment your staff and drive strategic projects through your organization
- Every week, join our partner [office hours sessions](#) and ask your pressing questions

[See all the nonprofit training options](#)

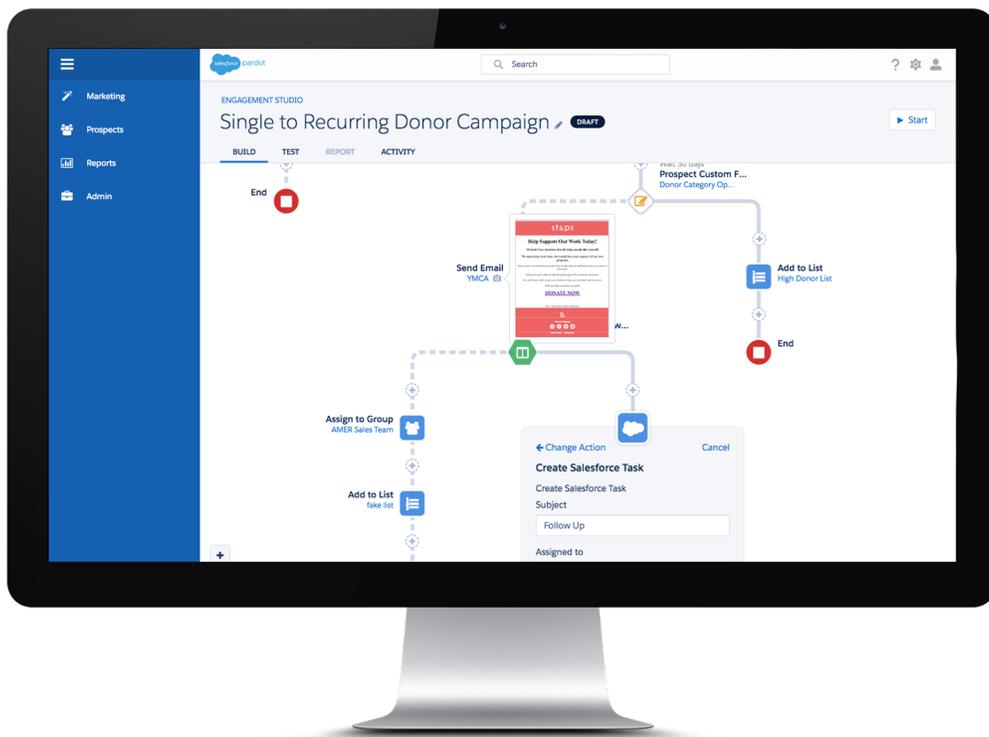
NONPROFIT CLOUD INNOVATION

JUMPSTART

For smaller nonprofits that want to get going fast, and within their smaller budget, Salesforce.org offers pre-packaged implementation services that can help you get Nonprofit Cloud for Fundraising implemented for based use cases.

NEW PREMIER OFFERINGS

We have recently added new offerings to help you get started faster with [fundraising and campaign management](#).



RESOURCES

GET STARTED NOW

[Learn more on our nonprofit fundraising page](#)

Watch the fundraising overview demo

[Read the Donor-Centric Fundraising e-Book](#)

