salesforce.org
nonprofit
cloud

SALESFORCE FOR GRANTMAKERS

Move from award to impact, faster.

Grants management processes can be complex, and at times tedious. Without a complete view of your relationships and the lifecycle of your grants, you – and your grantees – can get bogged down by manual processes, complex application and reporting requirements making it challenging to know if you're delivering on your program initiatives.

With Salesforce for grantmakers, you can streamline a multi-step process for both you and your grantees so together, you can drive more impact.

Salesforce combines the world's #1 constituent relationship management system (CRM) with a grants management system so you can work smarter, and not harder. Begin engaging with prospective grantees before they are even given a grant. Understand who they are in relation to your organization and how you've engaged with them in the past. Steward them through the application, evaluation, and acceptance stage to awardee. Set up your financial payments easily and make it simple for grantees to check in, connect, and report back to you about the impact of your grant. Gain a complete view of all your grants and gain meaningful insights on what you should continue investing in.

BUILD BETTER RELATIONSHIPS

While funding is your primary operation, at the heart of it all is relationships. Salesforce's CRM makes it easy to **manage information on your constituents** in a single place. This helps you get a sense of who you're working with and create meaningful interactions with prospective grantees, awardees, fiscal sponsors, partners, board members, advocates and more.

TRANSFORM GRANTEE ENGAGEMENT

Your grantees are your customers and it's all about driving a better customer experience these days. With Salesforce's marketing suite, you can automate personalized communications so your **prospective, current, and past grantees get the information they need**, when they need it. And all without you having to click send on every email. With collaborative tools like Community Cloud, you make it easy for your grantees to find important resources, check upcoming and past payments, submit impact reports, and communicate with you as a grantor outside of your email.
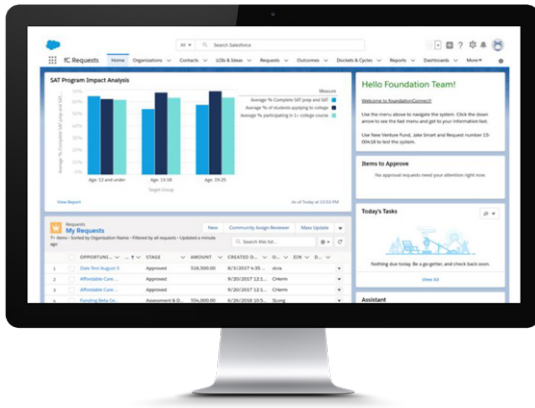
50%

decrease in administrative and reporting time*

Source: 2019 Salesforce.org "Voice of the Customer" Survey, an independent survey of 1,469 customers from the nonprofit and education sectors, conducted by the Salesforce Customer Insights team.

MANAGE THE ENTIRE GRANT LIFECYCLE

Each organization is different and so are your grantmaking processes. And the last thing you want to do is make your application and reporting processes more tedious for your grantees. foundationConnect is a powerful grants management system that is **flexible enough to meet your unique needs** so you can manage your entire grant lifecycle from application to fund disbursement to reporting. All while making it easy for grantees to report on the outcomes of grant dollars.
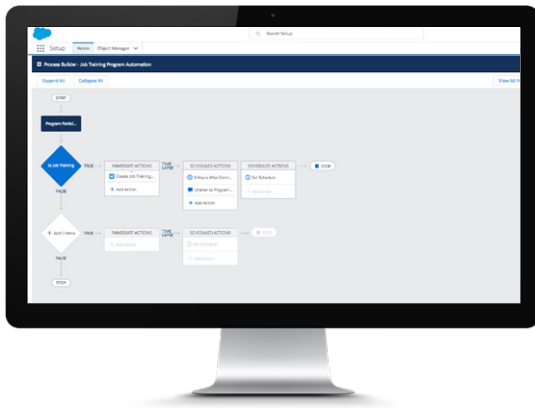
BECOME A SMARTER GRANTMAKER

Telling the story of your philanthropic impact is crucial. With built in reporting, analytics and **customizable benchmarking** it's easier to tell that story with your data. But what if you could take it even further? Social Studio helps you better **understand the trends in the sector** and what matters most to your grantees through social listening. Einstein Analytics takes reporting to the next level by analyzing trends in data to **determine how to make grant dollars go further**. Imagine if you could know what types of programs perform better so you can then target the ideal grantees.

STREAMLINE MANUAL PROCESSES

Time is money and the more connected your systems are, the less you spend on tedious tasks and the **more time you can spend on the mission**. Automate the processes you do manually today and set up workflows to save time and create consistency.

CONNECT ALL THE DOTS

Think of the Salesforce AppExchange like your phone's app store. With thousands of apps to choose from, you can add additional functionality that directly integrates with Salesforce so all your **business processes are connected and you save on IT costs**. From document management to accounting, and so much more.

GET IN TOUCH   Contact us to learn more about Nonprofit Cloud.

LEARN MORE

Everyone who wants to change the world should have the tools and technology to do so. Technology is the most powerful equalizer of our time, providing access to data, knowledge, and – above all – connections. Salesforce.org gets our technology in the hands of nonprofits, educational institutions, and philanthropic organizations, so they can connect with others and do more good. As a social enterprise, the more missions our technology supports, the more we invest back into technology and communities, creating an endless circle of good. We're here to help; visit us at Salesforce.org.