



# The COVID-19 Nonprofit Response Playbook

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A Guide for How to Lead and Build Resilience  
for the Next Normal



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Chief Advancement Officer  
Sierra Club

# Foreword

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We hope this finds you, your family and your loved ones healthy and safe. This pandemic impacts everyone, reminding us that we're all truly connected and that we have obligations to take care of and empower each other.

[At Salesforce.org, we're working tirelessly to leverage our resources, relationships, and products to help all of us navigate this crisis.](#)

From remote open source sprints to bring the community together, to donating to key efforts like the CDC Foundation's Emergency Response Fund, to providing pro-bono services, we're here to support nonprofits at the frontlines of supporting communities through these trying times.

For nonprofit leaders like you, we're partnering with the world's leading experts, and our customers and partners in every region, to make sense of this crisis and how nonprofits can respond. We're collaborating with our entire ecosystem to synthesize useful insights into step-by-step recommendations to guide you in building a more resilient organization ready to respond effectively as communities reopen.

This playbook presents a simple, organized way to identify decisions you can make now that will prepare you to move out of the crisis stronger than before. Use this versatile tool to assess where your organization is today, as you outline specific actions you can take in the next normal.

We truly are all in this together, and we thank you for your continued partnership. We look forward to hearing your story as you begin reopening your workplace and services safely.

## DAVID RAGONES

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# Introduction

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Nonprofit leaders face more uncertainty today than they have for decades. In all that complexity, having a framework to help assess where to focus and how to determine readiness to reopen safely is a key first step.

Salesforce.org has collaborated with experts across our ecosystem, and listened to our nonprofit community to develop this response playbook. It provides a structured approach to help organizations understand where they are today and where they may need more help as they progress through the response journey.

As the next normal unfolds, this playbook can help both map out your organization's journey and support the multitude of day-to-day decisions ahead.

# There Is Enormous Economic Uncertainty

Pace of economic recovery may span 18 months to 3 years, with several possible trajectories.

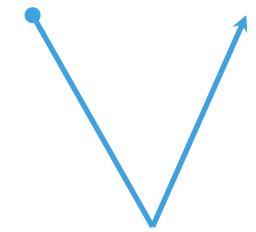
In addition to not knowing how the virus will progress, we are all operating in a time of massive economic uncertainty.

Research identifies four models of potential economic outcomes. However, no model fits every region, which only adds to the uncertainty.

Consider these outcomes as your institution develops scenario planning.

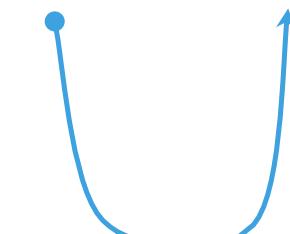
## V-SHAPED

A V-shaped recovery with a possible short-lived boom driven by huge stimulus needed for a hard stop to the pandemic.



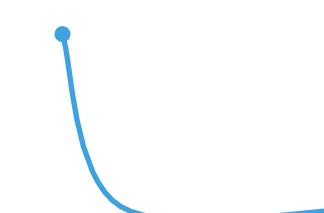
## U-SHAPED

A U-shaped recovery based on a longer crisis driven by a more modest response to the pandemic.



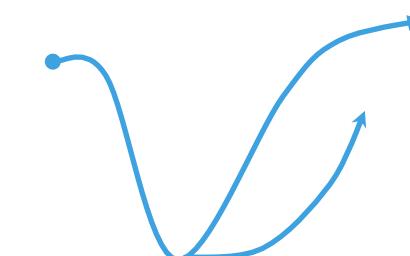
## L-SHAPED

An L-shaped non-recovery of a decay into depression driven by failed responses to the pandemic and economic crisis.



## Y-SHAPED

A Y-shaped recovery is a combination of U- and L-shaped recoveries – in this (likely) case, the economy divides into two tracks: slow and fast sectors.



# What Is the Best Path to the Next Normal?



We all left the old normal behind when we were asked by our leaders to stay in our homes. Now we find ourselves in the new normal of COVID-19. And, the big question remains: What will the next normal look like?

One thing we do know is that we will never return to the old ways of driving constituent and nonprofit success. The crisis accelerated digital transformation in ways that will change the way we work and educate for years to come.

## THIS MEANS NONPROFIT LEADERS NEED TO ASK THESE CORE QUESTIONS:

- How and when do I safely reopen physical spaces?
- Do we need to reimagine who we are and how we engage with our supporters?
- Will my staff have the right skills for the next normal?
- Does my organization have the resilience to handle any future crisis?

You can't do everything at once – so consider the phased approach we explain in the next section.

# A Structured Approach Mapped to Your Readiness

We found that taking a structured approach – divided into three distinct, yet often concurrent, tracks – helps guide and simplify decision-making.



# Structuring Your Approach

## TRACK 1

### Stabilize

Mitigate short-term risks and stabilize operations.



Execute robust, **in-crisis response** to protect and run your organization during lockdown.



CRISIS  
COMMAND CENTER

## TRACK 2

### Reopen

Assess if, when, and how to return to the workplace.



Put in place the planning, logistics, and communications to **reopen office and program locations** while **protecting and informing staff and volunteers**.



ADAPT  
COMMAND CENTER

## TRACK 3

### Evolve

Accelerate digital transformation for the next normal.



Operate more efficiently, harness digital and personalize engagement with your constituents to grow **mission impact** and increase **relevance**.



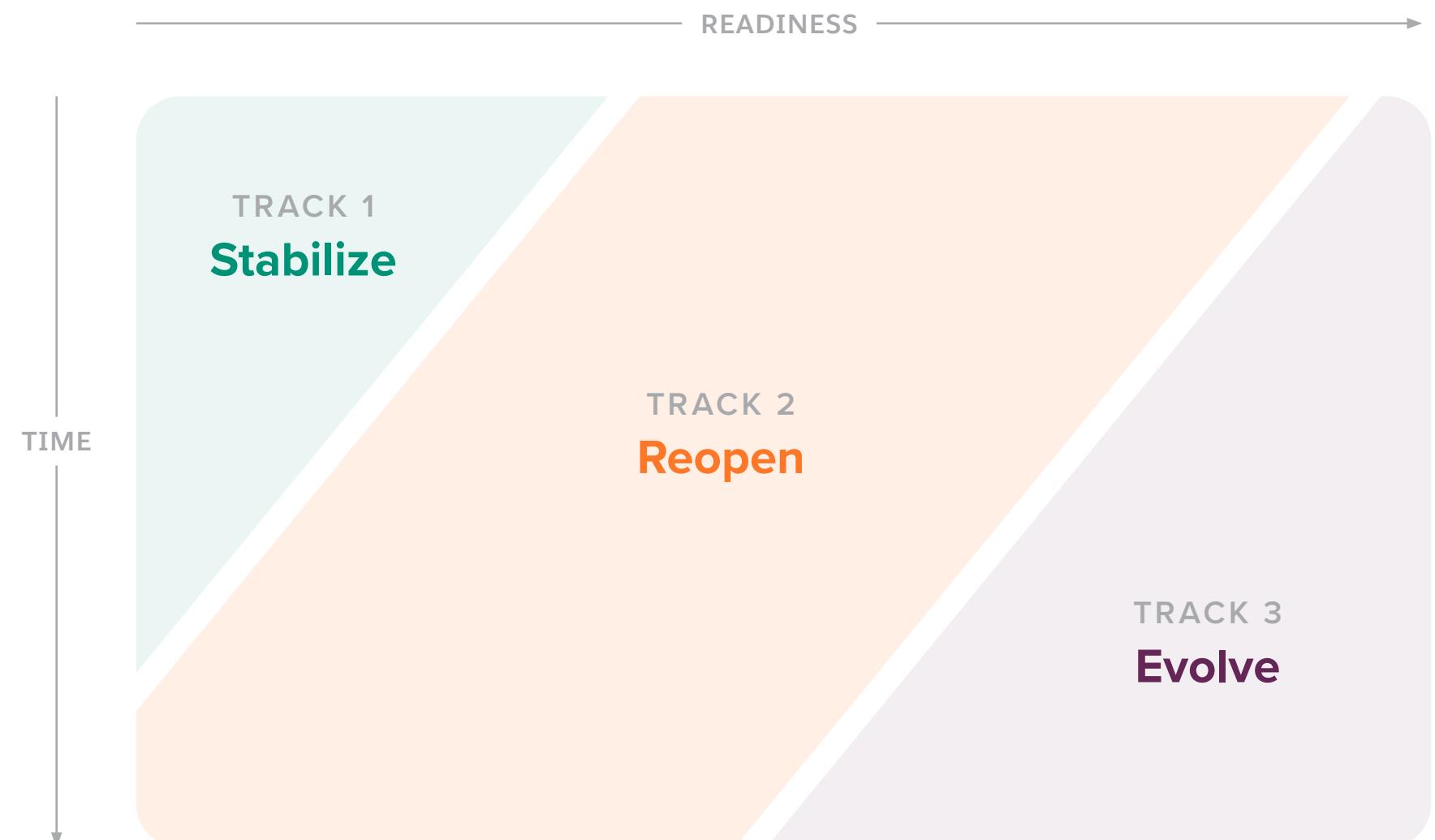
NEXT-NORMAL  
TRANSFORMATION OFFICE

## Institutions May Operate at Different Speeds

Different businesses, industries and geographies will operate at different paces. Even with your organization, it's possible for one part of the organization or affiliate to be within its own track.

For example, one organizational unit may be struggling to stabilize because its leaders don't have easy information access or processes to make fast operating decisions. In those cases, teams will spend more time stabilizing before embarking on an effort to return to the workplace.

On the other hand, some organizations will already be well into an massive evolve phase because they were born digital or the current market has increased demand for their products and services.



# Four Constituent-Centric Capabilities

Salesforce can help you bring a constituent-centric mindset to your approach. Consider how you evolve these four capabilities below to improve your crisis response and resilience. Each further reinforces your constituent-centricity, empowering your staff. Salesforce is uniquely able to help you in each of these areas.

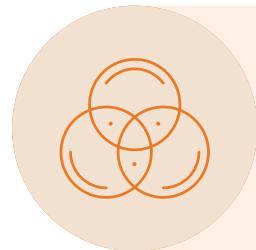
Now that you have a clear view of the three tracks, the next step is to break each track into much more granular actions you can take.



## How You Make Decisions



Structure planning and information gathering  
Use internal and external data to assess if, when, and how to return to the workplace, safely  
Establish a data culture with strong tools, visualizations, and new KPIs



## How You Work



Develop an internal communications cadence  
Prioritize collaboration and increase productivity  
Consider upskilling and reskilling to align to new ways of working



## How You Engage Stakeholders



Focus on stakeholders and constituents  
Redesign stakeholder experiences based on new needs  
Deepen personalization through digital engagement



## How You Involve and Serve Communities

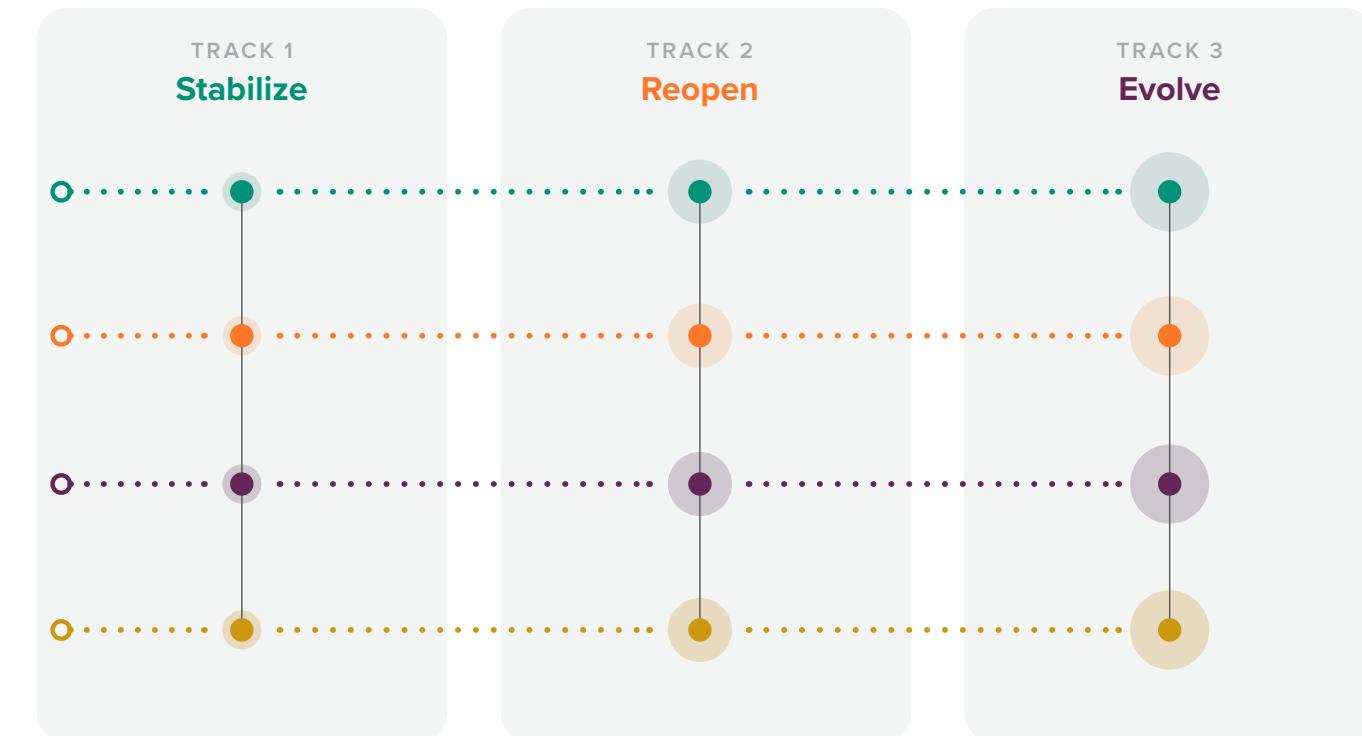


Engage with businesses and corporate partners to support fundraising and program efforts  
Facilitate civic leadership and cooperation between your organization, businesses, communities, and government  
Increase advocacy for your mission through transparent impact measurement

# Where Are You in Your Response Journey?

In evaluating their own crisis response, organizations have found it helpful to consider the tracks by breaking them down into four capabilities.

Follow this approach to ensure your structure your response around your constituent.



Use this framework to reflect on the strongest areas of your crisis response and where you need to make significant progress.

You may wish to pursue all three tracks at the same time by assigning task forces within your organization, but you need to make important decisions in each track to ensure a smooth transition from one to the next.

## TRACK 1

# Stabilize

The crisis may be unfolding around you. This stabilize track is about protecting your staff and running your organization as best you can.

As a leader, you likely began responding by setting up a dedicated crisis response team to define options, risks, and actions across departments.

Your stabilize plan should include how you make decisions, how you adapt work, how you engage stakeholders and how you serve your communities.

# Overview of Recommendations

Review this graphic for a high-level overview of what your stabilize priorities should be for each constituent-centric capability. Then, for each capability, see its checklist for considerations and possible actions to take with your leadership team.

## MITIGATE SHORT-TERM RISKS AND STABILIZE OPERATIONS.



### How You Make Decisions

#### **Establish a crisis command center.**

Establish stabilization team, impact room, and plan; create a stabilization V2MOM; develop action plans; build intelligence dashboards; model scenarios; capture feedback.

#### **Make swift resource decisions.**

Prioritize, realign, and repurpose leadership time and resources; implement cost controls; stop nonurgent initiatives; put in place and manage contingency plans.

#### **Establish a data culture across the organization.**

Build and distribute reusable datasets and dashboards to enable faster decision-making; determine donor lifetime value; build accountability performance matrix; build deeper analytics models.



### How You Work

#### **Define and execute the stabilize work plan.**

Create crisis taskforce and response V2MOM; segment stakeholders; clearly communicate the plan; make it easy to provide feedback; reinforce leadership visibility and transparency.

#### **Empower staff and volunteer productivity.**

Ensure connectivity; streamline workflows and automate inefficient human processes; implement training for new tools processes; provide tips and training on how to best communicate with stakeholders.

#### **Support staff wellness.**

Supercharge your staff help portal with monitor social channels information to clarify staff assistance programs and resources; create cadence of storytelling.



### How You Engage Stakeholders

#### **Rapidly engage priority stakeholders.**

Enable call centers; prioritize digital channels; leverage service case data; listen at scale to all stakeholders; define and publish FAQs.

#### **Realign value propositions to stakeholder priorities.**

Provide digital destinations; shift messaging to be more human, empathetic, and personalized to crisis needs; co-create organization continuity plan.

#### **Optimize your digital engagement model.**

Increase performance of existing digital channels; focus human efforts on highest-need cases; monitor social channels.



### How You Involve & Serve Communities

#### **Set up processes to prioritize and plan donation efforts.**

Centralize donation and grant management; audit and assess data continually; socialize impact, assess unmet community needs.

#### **Mobilize the power of the affiliates and community.**

Crowdsource ideas; focus internal programs; make volunteering safe; create partnerships.

#### **Communicate transparently, track impact, and iterate.**

Clearly communicate how your organization is a platform for change; share ways for corporate partners to give back responsibly; create a giving dashboard; engage your network; support staff resource groups.

# How You Make Decisions

Making decisions occupies a majority of your time as a leader. There's no silver bullet to make those decisions easier – your choices significantly impact constituents and staff. But if you focus your decision-making around swift, insight-driven decisions, you can redirect your organization's resources to the most critical areas of your COVID-19 response.

## Establish a crisis command center.

- Establish stabilization team and war room** to focus information gathering and decision-making.
- Create a “Stabilization” V2MOM** to align around a single response strategy at the organization leadership level.
- Develop action plans** across (i) staff (ii) nonprofit operations (iii) constituents (iv) programs.
- Build intelligence dashboards** to simplify and accelerate decision-making.
- Model scenarios** – financial, operations, impact, constituent success.
- Capture feedback** from staff, constituents, partners and more.

## Make swift decisions resource decisions.

- Prioritize, realign, and repurpose** leadership time and resources according to new urgencies, reinforcing key initiatives with sufficient bandwidth.
- Implement cost controls**, cut nonessential expenses, and identify new revenue streams.
- Stop nonurgent initiatives** to avoid distraction.
- Put in place and manage contingency plans** for disrupted staff, volunteers, and operations.

## Establish a data culture across the organization.

- Build and distribute reusable datasets and dashboards** to enable faster and better data-driven decision-making across the organization.
- Determine donor lifetime value** measure to determine future development efforts, programmatize at scale.
- Build accountability performance matrix** to enable a total view of the organization across headquarters and affiliates.
- Build deeper analytics models** of changing learner needs and identify new decision variables.

### V2MOM Approach

The [V2MOM](#) is a simple framework for alignment and leadership. It boils down to these five questions:

**Vision:** What do you want to achieve?

**Values:** What's important to you?

**Methods:** How do you get it?

**Obstacles:** What is preventing you from being successful?

**Measures:** How do you know you have it?

# How You Adapt Work

Use this time to develop and execute a plan to support your staff's wellbeing, while ensuring they can stay productive in new environments. Prioritize their physical and psychological safety. You'll likely have to rethink processes, tools, and technology as you evolve your traditional ways of working.

## Define and execute stabilize work plan.

- Create “Crisis Taskforce and Response” V2MOM** focused on employee, volunteer, and beneficiary safety, productivity, and wellness.
- Segment stakeholders** to enable clear and targeted communications.
- Clearly communicate the plan**, tailored to each segment, ensuring steady and frequent situation updates, new policies, and guidance.
- Make it easy to provide feedback**, through multiple, low-friction channels (respond to faculty and staff questions, feedback, and ideas).
- Reinforce leadership visibility and transparency** with regular virtual all-hands meetings.

## Empower staff and volunteer productivity.

- Ensure connectivity** for remote staff, volunteers, and programs with secure email, VPN, and web conferencing.
- Streamline workflows and automate inefficient human processes** (donations, approval changes, etc.) to remove friction.
- Implement training for new tools and processes**, including decision support and virtual collaboration.
- Provide tips and training on how to best communicate with stakeholders** (e.g., build empathy and active listening).

## Support staff wellness.

- Clarify assistance programs and resources** available to employee and staff (childcare, financial planning, mental health).
- Create regular cadence of storytelling** with insights and tips from faculty and staff, learners, families, beneficiaries, and partners.
- Establish staff help portal** to provide access to all services (IT, HR, finance, etc.); identify and prioritize new offerings based on query analytics.

# How You Engage Stakeholders

Even as you're stabilizing your organization, you can connect with and support your constituents, stakeholders and partners. Establish where and how you're available to communicate with them, and consider introducing new services or products that will especially help in their new context.

## Rapidly engage priority stakeholders.

- Enable Call Center at home** to respond to increased service demands.
- Prioritize digital channels** for fundraising, programs, communication, and collaboration.
- Leverage service case data to identify stakeholder experience improvements.
- Listen at scale to all stakeholders through digital roundtables** to learn emerging needs and share information and updates.
- Define and publish FAQ pages** for all stakeholders.

## Realign value propositions to stakeholder priorities.

- Provide digital destinations and portals** to better meet immediate beneficiary needs.
- Shift messaging** to be more human, empathetic, and personalized to crisis needs.
- Cocreate institution continuity plans** with staff, beneficiaries, and partners to streamline operations.

## Optimize your digital engagement model.

- Increase performance of existing digital channels** to generate greater scale and response effectiveness.
- Focus human effort on highest-need cases**, using self-service channels, predetermined traffic routing rules, and automation.
- Monitor social channels** and respond quickly to real-time conversations.

# How You Involve & Serve Communities

Your organization can play a pivotal role in serving your community during tough times. As part of your stabilizing motion, determine and communicate how your organization can better mobilize the full power of your services and network.

## Set up processes to prioritize and plan donation efforts.

- Centralize donation and grant management** through a task force to maximize impact.
- Audit and assess** data continually to enhance efforts for corporate partner matching and VTO.
- Socialize impact** on how your organization is responding to the crisis, continuing your mission and ways the community can help.
- Assess for unmet community needs** to focus on equality and equity.

## Mobilize the full power of the affiliates and community.

- Crowdsource ideas** by opening a request or help line for how best to help.
- Focus internal programs** to play to your strengths, aligning with your core offering and values.
- Make volunteering safe** by creating new protocols to align volunteer policies with safety guidelines.
- Create partnerships** with other trusted nonprofits/corporate partners to scale community impact.

## Communicate transparently, track impact, and iterate.

- Clearly communicate** how your organization will be a platform for positive change in the crisis.
- Share ways to help corporate partners to give back responsibly** through a timely communications cadence.
- Create a “giving dashboard”** to monitor and analyze impact with real-time data.
- Engage your network** of philanthropic partners to collaborate for impact.
- Support staff resource groups** with guidance for giving talent and resources aligned to their values.

TRACK 2

## Reopen

Your initial response to COVID-19 is about stabilization. Then, it's time to set the wheels in motion to reopen your workplace.

Even as you're mobilizing different teams to reopen – from real estate and IT to employee success – you're also preparing for the possibility of another outbreak and shelter-in-place period.

Listening is a key muscle to flex in this track. Ask your team to listen through surveys, one-on-one meetings with constituents, analysis of program service trends, and more. Translate insights into action and extend that knowledge through your entire ecosystem of suppliers and partners.

# Overview of Recommendations

Overview of Recommendations Review this graphic for an overview of what your reopen priorities should be for each constituent-centric capability. Then, for each capability, review the checklist for considerations and possible actions to take with your team.

## ASSESS IF, WHEN, AND HOW TO RETURN TO THE OFFICE.



### How You Make Decisions

#### Establish an organization command center.

Engage an organization command center; keep up to date with regulatory requirements; define data sources; enable advances in data modeling; engage with medical advisor or expert sources.

#### Build reopen plan.

Build a unified reopen plan; define mobilization, logistics and support plan; define health attestation requirements; refine target reopen operating model, define phased containment plan.

#### Unify reopen feedback and decision-making.

Instrument the return to work; collate feedback and insights; ensure timely, trusted cadence of updates.



### How You Work

#### Execute staged reopen plan optimized for safety.

Review and adopt new staff protection regulations; redesign your workplace and program environments; execute staff manual contact tracing; operationalize sanitation practices; execute staff and volunteer attestation process.

#### Enable staff with tools for reopen environment.

Activate multiple channels for staff and volunteers to get information (portals, training); use staff and volunteer surveys; adjust onboarding and training; establish travel advisory; support mental health needs.

#### Return to workplace with greater flexibility.

Enable increased work flexibility; align on staff child care needs; centrally review new skill and role needs; explore overall best hiring options.



### How You Engage Stakeholders

#### Deeply understand changing needs.

Capture evolving needs through programmatic focus groups and advisory boards; capture shifts in how constituents want to engage; evolve data strategy based on new data requirements; establish ethical use advisory council.

#### Build trust through personalized experiences.

Support virtual interactions; make it easy for stakeholders to find information; foster communication; prioritize automation and drive personalized communication.

#### Execute shift to digital operations.

Accelerate progress towards a connected nonprofit, prioritize automation; help affiliates and partners optimize.



### How You Involve & Serve Communities

#### Adapt giving goals and shift resources to new needs.

Recalibrate financials; understand assets; empower productivity; communicate your impact locally and transparently.

#### Track impact to iterate responses.

Create impact dashboards; leverage AI; plan for the long term; sense and respond to new ideas.

#### Empower and amplify equitable workforce efforts.

Supercharge volunteerism; support corporate partner staff resource groups; commit to providing career development opportunities; establish equity as a key decision factor.

# How You Make Decisions

Your decision-making in this track should focus on the new, evolving needs of your internal and external stakeholders. Get ready, because your leaders will have a lot of questions. Be proactive by setting up an organization command center and designing a data-driven plan to get everyone back to work. Think holistically to ensure you're accounting for all voices and feedback.

## Establish an organization command center.

- Engage institution command center** to coordinate people, policy, and health data management dashboards, and collaboration feed as a single source of truth.
- Keep up to date with regulatory requirements** for social distancing, school safety, and testing protocols.
- Define data sources (existing and new)** to enable optimal decision-making, including faculty, staff, and learner health, physical density, and sanitation status.
- Enable advanced data modeling** (scenario planning, what-if analysis, and risk modeling) with dashboards, public datasets, and internal data.
- Engage with medical advisor** (or expert sources) to monitor and visualize virus progression as shelter orders lift.

## Build a reopen plan.

- Build a unified plan** for cascading notifications, work plans, and effort needed to activate a safe return to workspaces.
- Define mobilization, logistics, and support plan** including COVID-proofing, testing tool procurement, move sequencing, and space management (e.g., employee, staff, beneficiary, and volunteer density across programs).
- Define health attestation requirements** and process, including contractor and visitor policies.
- Define target reopen operating model**, modeling potential scenarios on organization operations/employee and staff impact.
- Define phased containment plan** in case of localized lockdown reactivations.

## Unify reopen feedback and decision-making.

- Instrument the return to physical spaces** with a single truth view of all critical data, including employee, staff, and volunteer segmentation, schedules, and completion.
- Collate feedback and insights** from all stakeholders and partners, and synthesize into improvement opportunities and shareable insights.
- Ensure timely, trusted cadence of updates** to all stakeholders and partners.

# How You Adapt Work

This is where staff across departments will start to see your new plan take shape. Execute your reopen plan with the right tools and processes, ensuring staff safety and work-life balance. Greater flexibility for staff, including parents, is key to your organization's return to the workplace – and so are multiple channels and tools for staff to get information.

## Execute staged reopen plan optimized for safety.

- Review and adopt new staff protection regulations** in alignment with government policies and healthcare experts.
- Redesign your workplace and program environments** using new health and safety best practices (hallways, elevators, classrooms, etc.).
- Execute staff manual contact tracing process** optimized for security and privacy of personal health data.
- Operationalize sanitation practices** in offices, hallways, bathrooms, staff rooms, etc.
- Execute staff and volunteer attestation process**, including wellness certification and tracking.

## Enable staff with tools for reopen environment.

- Activate staff and volunteer portal** with up-to-date resources and policies.
- Use staff and volunteer surveys** to automate individualized employee work-from-home and assistance communications.
- Adjust onboarding and training** based on new ways of working, and using facilities.
- Establish hotline for “see something, say something” and inquiries** via phone, web, text, internal social feed.
- Establish travel advisory** to enforce policy, advise, monitor, and track all travelers.
- Support mental health needs** with staff and volunteer wellness apps and enhanced counseling services.

## Return to workplace with greater flexibility.

- Enable increased work flexibility**, including ramping up or staggered hours, appointments, and volunteer time.
- Align on staff child care needs** to support employee at-home needs with reopen schedule.
- Centrally review new skills and roles needs** based on market changes.
- Explore overall best hiring options** (hiring, reskilling, contractors, volunteers, etc.).

# How You Engage Stakeholders

How you engage stakeholders starts with listening. Invest in understanding your constituent's new realities – the work will pay off later. Partner with your broader ecosystem across partners and vendors to deliver experiences together that meet constituent's evolving needs. Personalize experiences and communication across programs, fundraising, marketing, IT and other departments.

## Deeply understand changing needs.

- Capture evolving needs** through programmatic focus groups and advisory boards.
- Capture shifts in how constituents want to engage**, including donor trends, social services, and technology needs.
- Evolve data strategy based on new data requirements** to ensure safe physical experiences.
- Establish ethical use advisory board** and guidelines to govern health and other sensitive data usage.

## Rebuild trust through personalized experiences.

- Support virtual interactions** to help constituents navigate their goals and priorities.
- Make it easy for stakeholders to find information** they need to make decisions through digital one-stops and chatbots.
- Foster connections** with tailored stakeholder communities.
- Prioritize automation** to replace inefficient human processes (donations, volunteering, etc.).
- Drive personalized communications** at scale for every phase of the mission experience as it shifts with the current climate.

## Execute shift to digital operations.

- Accelerate progress** toward a connected nonprofit for single source of truth.
- Prioritize automation** to replace inefficient human processes (segmentation, donor lead scoring, outcomes measurement, etc.).
- Help affiliates and partners optimize** for emerging offerings through communities and portals.

# How You Involve & Serve Communities

Enable and empower staff to continue to serve society as you reopen and emerge from crisis. Adapt giving goals, shift resources and track impact. Ensure your organization is working towards building equitable workforce efforts.

## Adapt giving goals and shift resources to new needs.

- Recalibrate financials** with leadership and your board to maximize matches, grants, and donations.
- Understand assets** by rethinking programs and products, or creating new offerings to address health and economic challenges.
- Empower productivity** processes and policies to maximize the impact of your staff and understand where community pro bono fits.
- Communicate your impact locally and transparently**, truthfully, and with compassion.

## Track impact to iterate responses.

- Create impact dashboards** to monitor giving results and analyze impact with real-time data.
- Leverage AI** to optimize giving and volunteer efforts.
- Plan for the longterm** by identifying new programs or investments that can endure post-crisis.
- Sense and respond to new ideas** from staff to refresh ways to serve, volunteer, and donate.

## Empower and amplify equitable workforce efforts.

- Supercharge volunteerism** and ensure volunteers can participate safely (even remotely).
- Support corporate partner staff resource groups** with guidance for giving back talent and resources aligned to their values.
- Commit to providing career development opportunities** at your organization for highly skilled and under-credentialed candidates as the economy recovers.
- Establish equity as a key decision factor** in all post-crisis investments, including resources, technology, and more.

## TRACK 3

## Evolve

Once operations are stabilized and your offices and program locations are opened, you can once again focus on the growth of your organization. In this track, you accelerate change to grow in the next normal.

As a leader, this is where you get the opportunity to drive a growth agenda and come out of this crisis even stronger. Make your vision a reality by assembling the right team – we call it a next-normal transformation office.

This will be your go-to crew as you create an engaging staff experience, recenter around constituents.



# Overview of Recommendations

Overview of Recommendations: Review this graphic for an overview of what your evolve priorities should be. Then, for each capability, review the checklist for considerations and possible actions to take with your team.

## ACCELERATE DIGITAL TRANSFORMATION FOR THE NEXT NORMAL.



### How You Make Decisions

#### **Establish digital transformation office.**

Create Office of Digital Transformation; publish an executive leadership digital transformation vision; audit and reimagine stakeholder experiences; build business cases for high-impact change; evaluate new revenue models.

#### **Define the target digital operating model.**

Align around the target digital operating model; diversity and reexamine job descriptions create a single organization digital government model; unlock the value of data; automate decision-making.

#### **Continuously sense change and respond with agility.**

Define an organization performance matrix; define next-normal KPIs; augment respond capabilities; extend data to partners.



### How You Work & Educate

#### **Supercharge staff productivity.**

Leverage growth industry best practices; simplify finding answers; enable business leads to build powerful apps; automate processes across front, middle, and back offices; personalized staff journeys.

#### **Enable staff development.**

Equip staff with a skills profile; simplify learning for must-have skills; upgrade reskilling; source for diversity; reexamine job descriptions.

#### **Foster a staff-friendly workplace.**

Create multiple avenues for staff feedback; evolve new working practices, health and wellness resources.



### How You Engage Stakeholders

#### **Redesign institution processes to be constituent-centric.**

Systematically audit constituent moments based on “job to be done”; design and enable stakeholder journeys at scale, streamline key touchpoints; leverage best practices from other industries.

#### **Enable the full power of your organization.**

Create single source of truth; design and execute constituent experience journeys; enable funding partners to see real-time data; reconceive your organization as a platform; train and enable staff for new digital environment.

#### **Accelerate your digital transformation.**

Leverage service case data to prioritize; supercharge listening; enable analysts as citizen developers; develop reusable processes.



### How You Involve & Serve Communities

#### **Accelerate your mission at scale.**

Identify additional partnerships; sense and respond to new ideas; formally communicate your societal impact progress; measure and report your impact; establish an Office of Equitable Access.

#### **Evolve your theory of change.**

Continue to focus on impact; commit to new ways to involve and grow advocacy; identify areas to align to the SDGs; devote a PR and marketing effort to generate momentum and support; spotlight internal successes and heroes.

#### **Triple down on equity and inclusion for the long term.**

Evolve sustainability practices; rethink your physical spaces; share data responsibly; appoint a Chief Equity Officer; define plan to measure equity.

# How You Make Decisions

In the next normal, your digital transformation office will help bring your vision and strategy to life. Establish a V2MOM to drive alignment around that strategy. V2MOM stands for vision, values, methods, obstacles, and measures, and it's a valuable way to make sure key milestones are actually hit on your journey to high-impact change.

## Establish digital transformation office.

- Create an Office of Digital Transformation and V2MOM** to drive organization alignment around the next-normal strategy.
- Publish a executive leadership digital transformation vision** to align everyone on the mission and overall target outcomes for transformation.
- Audit and reimagine stakeholder experiences** to increase relevance, simplicity, and speed.
- Build business cases for high-impact change** across all constituents and establish new ways of working, and core operations.
- Evaluate new revenue models** that align with the mission.

## Define the target digital operating model.

- Align IT and the institution around the target digital operating model** that will bring the mission vision to life.
- Create a single organization digital governance model** that underpins the digital operating model.
- Unlock the value of data** through a “build once, reuse infinitely” API network model.
- Automate** decision-making for greater speed, especially for known work patterns.

## Continuously sense change and respond with agility.

- Define and instrument an organization performance matrix** to enable a complete view of the institution across every department, school, and campus.
- Define and instrument next-normal KPIs** around the stakeholder experience.
- Augment sense and respond capabilities** to extract insights from stakeholders using surveys, value data, and other sources.
- Extend data and insights** to nonprofit, community, and corporate partners.

# How You Adapt Work

Your organization's culture is how you'll build a path forward. Closely evaluate your culture and talent to see where you can better enable your workforce in the next normal. Optimize for productivity while building an environment of learning, community, and wellness. Now's the time to be more friendly toward remote and flexible work options.

## Supercharge faculty and staff productivity.

- Leverage global growth industry best practices, e.g.,** onboarding, time to effectiveness, and staff alignment.
- Simplify finding answers** for staff and all stakeholders through multichannel knowledge base activated with bots.
- Enable department leads to build powerful apps** through low- and no-code platforms and to augment teams with design expertise.
- Automate processes across front, middle, and back offices** to drive speed, simplicity, and cross-team collaboration.
- Personalize staff journeys** with contextual, relevant information, and recommendations.

## Enable staff development.

- Equip staff with a skills profile,** enabling organizationwide skills analysis and optimized opportunity matching.
- Simplify learning for must-have skills,** enabling fast and easy upskilling to support digital transformation and new ways of working to match mission needs.
- Upgrade reskilling** with needs assessment, tailored online learning journeys, and career opportunities.
- Source for diversity** and reexamine job descriptions to ensure qualification requirements attract diverse candidate pool.

## Foster a staff-friendly workplace and culture.

- Create multiple avenues for staff feedback** to increase transparency and enable fast improvement (surveys, social channels, etc.).
- Evolve new working practices** with a focus on community and environment.
- Evolve health and wellness resources** to address faculty and staffs' shifting physical and mental needs.

# How You Engage Stakeholders

Constituent-centricity was the name of the game before COVID-19, but now, it's even more critical. Focus on constituent-centricity by redesigning processes around your constituents, not your silos or departments. Innovate along with your external partners, who can help you scale and reach new customers. You've never been closer to unlocking the full power and potential of your company.

## Redesign processes to be constituent-centric.

- Systematically audit learner moments based on “job to be done”** to identify pain points and differentiation opportunities.
- Design and enable stakeholders journeys at scale**, using self-service channels, predetermined traffic routing rules, and automation.
- Streamline key touchpoints** throughout the constituent journey such as onboarding and issue resolution to increase speed and reduce effort.
- Leverage best practices from other industries** to improve staff effectiveness in serving beneficiaries.

## Enable the full power of your institution.

- Create single source of learner truth** to put all organization departments on the same page by aggregating multiple data sources.
- Design and execute constituent experience journeys** with rules- or AI-triggered next best actions for speed and simplicity.
- Enable funding partners** to see real-time data to optimize their relationship with you.
- Reconceive your organization as a platform**, enabling all stakeholders to accelerate your mission.
- Train and enable staff** for new digital environment: reporting and analytics, prioritization, and new communication and collaboration expectations.

## Accelerate your digital transformation.

- Leverage service case data** to identify highest-priority improvements and investments.
- Supercharge listening** via idea portals, surveys, and constituent listening tours.
- Enable analysts as citizen developers** to accelerate digital efforts closer to learner needs.
- Develop reusable processes and components (datasets, APIs)** to accelerate application development through maximum reuse.

# How You Involve & Serve Communities

As your organization continues to evolve, consider new ideas and operating models as you accelerate your mission at scale. Prepare for the future by tripling down on equality and sustainability efforts.

## Accelerate your mission at scale.

- Identify additional partnerships** by codifying a sustainable model for amplified giving of time, talent, hard assets, and human resources.
- Sense and respond to new ideas** from partners to refresh ways for community to serve, volunteer, and donate through engaged workforces.
- Formally communicate your societal impact progress** as part of your institution's success metrics.
- Measure and report your impact** to identify current status and overall improvement.
- Establish an Office of Equitable Access** to elevate awareness of and focus on key access considerations for every constituent.

## Evolve your theory of change.

- Continue to focus on impact** to help your constituents understand your theory of change.
- Commit to new ways** to involve and grow advocacy in person and virtually.
- Identify the areas for organization focus** that align to the Sustainable Development Goals (SDGs).
- Devote a PR and marketing effort** to generate initiative momentum and support.
- Spotlight internal successes and heroes** to encourage others across the institution.

## Triple down on equality and sustainability.

- Evolve sustainability practices**, e.g., keeping remote work as an option for workers and limiting travel.
- Rethink your physical spaces**, consider more virtual spaces and office consolidation.
- Share data responsibly for good** with trusted global organizations focused on societal change to impact the sector.
- Appoint a chief equity officer** to orchestrate organizationwide initiatives and maintain focus.
- Define plan to measure equity gaps** and initiate change efforts to achieve equity.

# How Salesforce.org Solutions Can Help

At Salesforce.org, Nonprofit Cloud is the complete portfolio of Salesforce technology to drive nonprofit success. It enables you to put the constituent at the center of everything you do.



# Nonprofit Cloud

Nonprofit Cloud brings constituents and organizations together. We empower nonprofit teams to fund and run their entire mission with one integrated platform that helps you build meaningful relationships.

From stabilizing operations in order to respond to immediate demands, to assessing when and how to reopen the workplace safely, to evolving to meet the next normal, Nonprofit Cloud is the single trusted platform to emerge from this crisis stronger and continue to drive change for good.

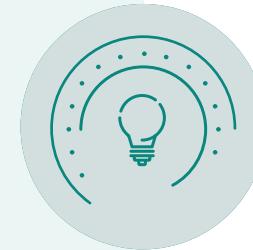


## SOLUTIONS

# Making Decisions & Transparent Leadership

We're here to help you execute a crisis response plan and continue to run your organization productively during lockdown.

Digital solutions, combined with expert advice and best practices from our community can help you create a stabilization V2MOM, establish a crisis command center, make swift resource decisions, and support employee wellness. Find trusted COVID-19 global data from our community of experts on our Tableau COVID-19 Data Hub.



## 1 | EXECUTIVE ANALYTICS

With Work.com Workplace Command Center, make data-driven decisions and assess return-to-workplace readiness from a single hub.



## 2 | COVID-19 DATA HUB

Jumpstart analysis with publicly available datasets from Tableau's COVID-19 Data Hub.



## 3 | CRISIS V2MOM

Empower education leaders to build holistic plans using Quip and the Salesforce V2MOM template.



## TACTICS

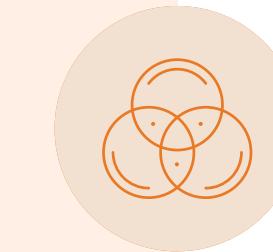
Crisis V2MOM templates in Quip  
V2MOM exercise  
Automated alerts and triggers based on new policies

Automated attestation and compliance processes  
Tableau data visualization (mobile, collaborative)  
Salesforce Surveys track employee wellness

Dedicated dashboards  
Salesforce Maps  
Salesforce Surveys

## SOLUTIONS

# Work & Educate

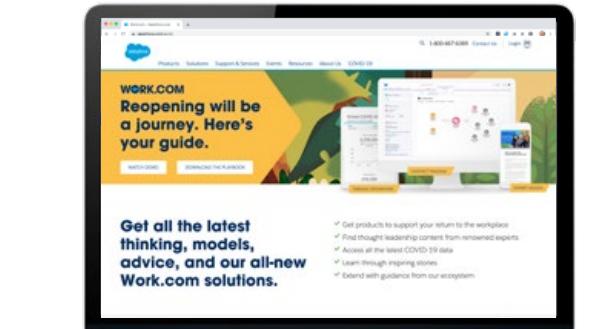


To help nonprofits assess readiness and how to do it safely, Work.com provides a platform with expert advice, trusted data, and powerful technology solutions.

Leaders can better guide reentry to the workplace with a command center and apps for employee wellness and workforce staffing. Advisory services and best practices from experts help facilities reimagine physical workspaces for the new world. Tools like Quip can help with team collaboration. And staff can receive training on new policies and skills for their evolving organization with new content kits from Salesforce's learning platform, myTrailhead.

## 1 | WORK.COM FOR NONPROFIT

A platform of expert advice, partners, and products built on the #1 CRM. Use tools like employee wellness check, shift management and planning, and more.



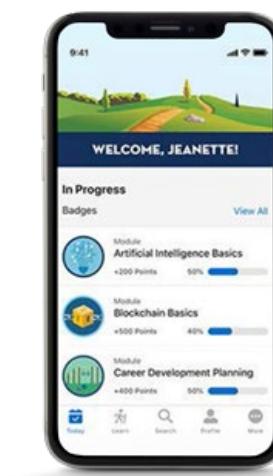
## 2 | QUIP WORK FROM HOME

Virtual collaboration tool to help teams work from home.



## 3 | MYTRAILHEAD

Empower staff to receive training on new policies and skills for their evolving organization.



## TACTICS

- Weekly institution all-hands
- Daily employee success emails
- Employee surveys
- Alternate hours and methods of operation

- Bot-assisted employee knowledge base (Concierge)
- [V2MOM app](#)
- Employee and staff journeys
- On-demand virtual collaboration training

- Mental health and mindfulness programs
- Self-service help center for employee crisis needs
- Omni-channel workspace for case management

## SOLUTIONS

# Engaging Stakeholders

Making the move to digital is no longer optional, it's an imperative to emerge stronger from this crisis. With Nonprofit Cloud, organizations have one integrated platform to manage their missions, drive efficiency, and accelerate impact.

Development teams can create digital moments and increase the diversity of their revenue sources to be more resilient for uncertain times. Marketers can put data to use in redesigning constituent journeys and deepening personalization to create lifelong supporters. Staff can have the right tools to deliver uninterrupted programs and services to communities in need. Nonprofits have an opportunity to evolve and become agile organizations poised for future success.



## 1 | NONPROFIT CLOUD FOR FUNDRAISING AND PROGRAM MANAGEMENT

Enable virtual fundraising, program management.



## 2 | NONPROFIT CLOUD FOR MARKETING AND ENGAGEMENT

Engage with your supporters to build strong relationships via digital, across all channels.



## 3 | APPEXCHANGE

Access curated resources to help nonprofits respond to the crisis.



## TACTICS

- Virtual events: town halls, fundraising, roundtables
- Executive Director letter to constituents
- Donor value scoring
- Conserving capital

- Innovation sprints and launches
- Social listening
- Service bots
- Reward programs

- Digital communities
- Partner communities

**SOLUTIONS**

# Enhance Corporate & Nonprofit Partnerships



Ensuring that corporate and nonprofit partners are aligned and focused on expanding community impact at scale is key, especially during COVID-19.

Organizations of all sizes can also harness new Nonprofit Cloud innovation and impact reporting to share impact metrics and successes to supporters.

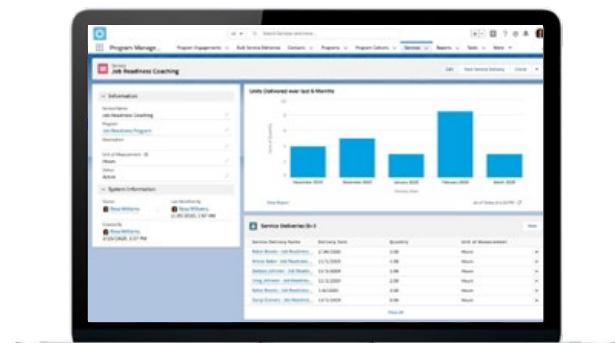
## 1 | SALESFORCE PHILANTHROPY CLOUD

Highlight your mission and mobilize workforce volunteering and track corporate donations.



## 2 | PRODUCT INNOVATIONS IN FUNDRAISING AND PROGRAM MANAGEMENT

Stand up new programs and strengthen fundraising.



## 3 | OUTCOMES REPORTING

With Einstein Analytics, share the results of your mission with funders and individuals.

**TACTICS**

- Sustainable Development Goals tracking
- Virtual volunteers
- Corporate partner portals

- Daily giving reports
- Corporate employee resource groups (ERGs)
- Volunteer time off (VTO) protocols

- Outcomes reporting
- Grant reporting
- “Ways to Help” webinars

# Your Response Journey with Salesforce.org

A lot has changed in the past few months. As a leader, you have the power to influence your constituents and community in profound new ways.

We hope these strategies to Stabilize, Reopen, and ultimately Evolve your nonprofit will help you keep constituents in the center of everything you do. When you work from that mindset, everything else becomes easier.

Check out these additional tools and resources.

Thank you and stay safe!

## Salesforce.org 1-to-1 Connect

Connect with peers and Salesforce.org experts to share best practices for crisis management, virtual operations, and online learning in the Power of Us Hub.

[Learn More](#)

## Salesforce Care™

Explore Salesforce's free offerings to respond to COVID-19 including faculty, staff, and learner support with chatbots, contextual learning, philanthropy, and more.

[Learn More](#)

## Immersive Team Briefings

Learn how leaders are transforming the way they work, make decisions, and engage their ecosystem of customers and partners.

[Learn More](#)

## COVID-19 V2MOM

Develop a shared vision, values and prioritized action plan for managing through the crisis using Salesforce's proprietary strategic planning methodology.

[Learn More](#)

## Salesforce.org Virtual Events and Web Series

Access Salesforce.org's virtual events and web series created to help education leaders navigate this challenging time.

[Learn More](#)

## Leading Through Change Content

Discover thought leadership, tips, and resources to help manage your institution in a time of uncertainty.

[Learn More](#)



# Customer Success

See how our customers are navigating the new normal.



# Customer Success



## ACTIONS TAKEN

- **Segmented audience by interests**, interactions and region to ensure targeted messaging
- Listened and learned from constituents by analyzing Marketing Cloud **metrics including open rates, what content is getting responses and more**
- Created content that will support and **engage the community**

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66 ADL is committed to continued and supportive engagement with our constituents. From sharing our mission to providing tools for navigating antisemitism and hate, we are maximizing our reach by meeting people on the channels with which they are engaging.”



**AMY ARONOFF BLUMKIN**

Former Vice President of Brand and Marketing  
Anti-Defamation League

# Customer Success



## ACTIONS TAKEN

- Fostered connection amid social isolation for NYC's LGBTQ community
- Client records were secure and **accessible regardless of where staff is located**
- **Chat capability implemented within two weeks**, providing a private and secure channel of communication
- Implemented a new way to allow **seamless, direct engagement** with followers on social media

66 Despite the need to be socially distant right now, we're utilizing the power of technology to connect in many ways including providing crucial health and wellness services.”



### JEFFREY KLEIN

Esq., Chief Operating Officer  
The Center

# Customer Success



## ACTIONS TAKEN

- Conducted hundreds of wellness checks during the crisis
- **Centralized contact details** from lists provided by local health centres
- Volunteers used a flow-based script to make calls and **automate follow-up tasks for action**
- Dashboards created for referral management and **reporting to local councils and funders**

“We would not have been able to meet the need at this challenging time without Salesforce and their commitment to us.”



**HAYLEY ROSS**

Service Manager  
Age UK Hythe & Lyminge

# Customer Success



## ACTIONS TAKEN

- On the frontlines providing vital educational community resources and patient care
- Established virtual galas and virtual camp ideation
- Significantly **expanded digital marketing fundraising capabilities** and **improved Individual Giving tracking**
- Enabled and adopted case assignment functionality within weeks
- Managing extensive Care Center network on a 100% virtual basis

66

At MDA we are on the frontline serving the patient, family and caregiver community and the MDA Care Center network by providing vital educational and community resources and patient care. The COVID-19 pandemic is a major threat to the health and safety of individuals living with neuromuscular disease as the underlying disorders result in compromised respiratory and/or cardiac function. Prior to the lock down we were well on our way toward using Salesforce to make this critical infrastructure and network more efficient, effective, and connected. Now we are moving faster to extend our impact to more patients and families by increasing clinician support and expanding MDA's National Resource Center to reach, and support the NMD community at-large during this time of crisis."



**LYNN O'CONNOR VOSS**

President and CEO  
Muscular Dystrophy Association

# Continue the Conversation

For more helpful resources on reopening your institution safely, please visit the Salesforce.org website.

[LEARN MORE](#)

*This Salesforce.org COVID-19 response playbook has been tailored specifically for nonprofit organizations. To see the Salesforce.com COVID-19 response playbook visit [here](#).*

