



CONTINUE PROVIDING HIGH QUALITY CLIENT SERVICE, NO MATTER WHAT

Use the power of the Salesforce ecosystem to adapt to changing circumstances in how you provide services

Whether it be an economic or public health crisis, nonprofits continue to rise to the challenge of doing more with less. While the demand for services hasn't slowed, nonprofits are navigating how to continue providing high-quality client service when in-person activities are curtailed. Salesforce is a unique platform that was built to work from anywhere – whether you and your colleagues are collaborating from home, at the office, or a hybrid of the two – to allow your organization to provide continuity of care your clients deserve. With tools that extend the power of [Nonprofit Cloud Case Management](#), case managers can stay in touch with clients they're used to seeing in-person or simply complete the task of getting a signature on necessary forms.

69% of nonprofits say they are now contemplating remote work even after the coronavirus crisis passes.*

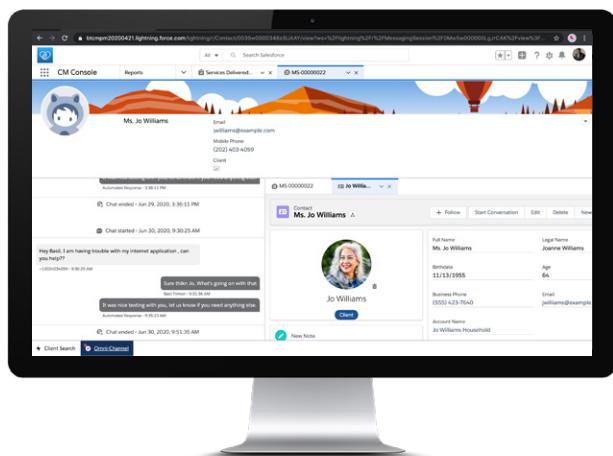
MANAGE THE ENTIRE CLIENT LIFECYCLE, FROM ANYWHERE

With [Nonprofit Cloud Case Management](#), case managers are able to track services, case plans, notes, incidents, assessments, and outcomes in a single secure system that is accessible from the office or home. Colleagues can collaborate on service delivery since they're accessing the same, up-to-date information. Now any service provider within your organization can have the full context of a client's goals and the right, next steps to keep them progressing towards their goals.

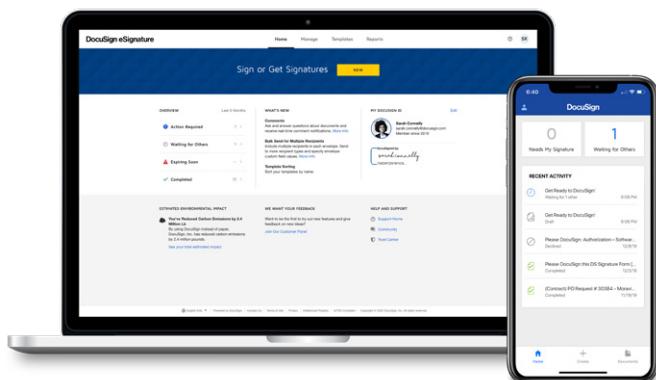
The following page includes applications from the Salesforce ecosystem that extend the power of [Nonprofit Cloud Case Management](#) to help your organization work smarter, not harder in these challenging times.



EXTEND THE POWER OF NONPROFIT CLOUD CASE MANAGEMENT



Case Management



E-Signature Tool

MEASURE THE IMPACT OF YOUR PROGRAMS

Understand if and how your services are helping clients and share with funders. Build out an indicator framework and use advanced assessment functionality with in-app data collection to track how your clients are progressing with one of our AppExchange partners.

IDENTIFY AND HELP CLIENTS IN CRISIS QUICKLY

Take a pulse on your clients' wellbeing by sending regular messages via SMS text, WhatsApp, Chat, or another tool with [Digital Engagement](#). Send and reply to messages directly from their client page in Salesforce and flag and triage clients who have urgent needs based on their responses. The conversation is automatically captured so you or your colleague can see where you left off.

VIRTUALIZE APPOINTMENTS

Scheduling can prove challenging especially when you're toggling between different systems and your calendar. Make it easy to meet with clients virtually by creating calendar invites and links to video conferencing tools, like Zoom, directly from within Salesforce with an AppExchange app. Just pull up a client's record and create a meeting, it's as seamless as that.

FROM WET SIGNATURES TO E-SIGNATURES

Whether you need to get a client's signature for their service plan or to obtain records from an external provider, it's hard to get an in-person, wet signature these days. Document signing apps from the AppExchange allow you to send and collect signatures virtually and unblock administrative tasks.

SPEND LESS TIME ON MANUAL TASKS, AND MORE WITH CLIENTS

A case manager's time is precious, especially when it comes to meeting the demand for services. Salesforce's [Digital Engagement](#) and automation tools lets technology answer commonly asked questions and trigger follow up communications without you having to take action. Focus your time on clients instead of repetitive, manual tasks.

GET IN TOUCH Visit us at www.salesforce.org to learn more.



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