SALESFORCE NONPROFIT CLOUD CASE MANAGEMENT

Scale personalized care to clients on a platform that helps service Providers track intake, referrals, clients, services, case plans, notes, incidents, and assessments

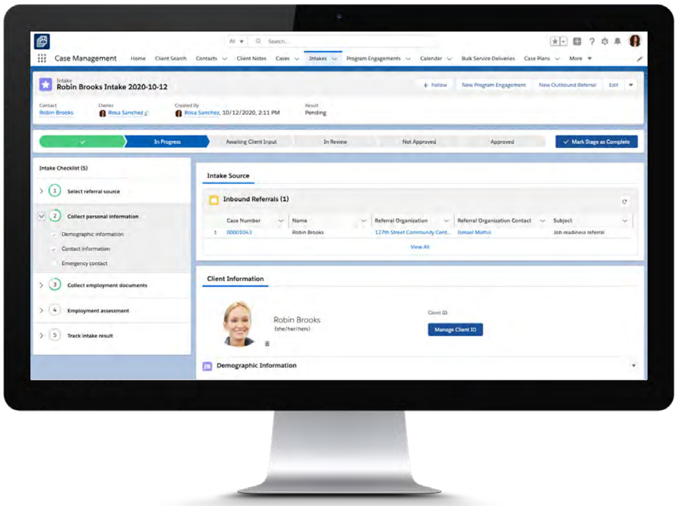
With Nonprofit Cloud Case Management, you can deliver personalized services to help clients progress towards their goals. By having your programs, services, and clients in a single system, you can ensure no one falls through the cracks and they get the quality of care they deserve.

Make sure no client falls through the cracks with Nonprofit Cloud Case Management.

BUILT ALONGSIDE THE NONPROFIT COMMUNITY

Thanks to our nonprofit community of customers and partners, Case Management was built with input from real users of the product, from case and program managers to Salesforce administrators to consultants who would implement the technology. This helped Salesforce build a solution that mimics how service providers at nonprofits work and to make sure this tool is what you need to drive more impact with your clients.

SCALE YOUR ABILITY TO DELIVER PERSONALIZED CARE AND SERVICES



Intake

CLIENT INTAKE & REFERRALS

In a time when the demand for services is higher than ever, refer them to another organization with Client Referrals and templatized Client Intake.

CASE MANAGER HOME PAGE

Start your day off right by having a single page that shows you upcoming client meetings, tasks, or incidents that are in need of your immediate attention.

CASE NOTES

Create a note and save it as a draft to come back to later. Tag notes with specific topics, so they're easy to find later on.

RECURRING SERVICES

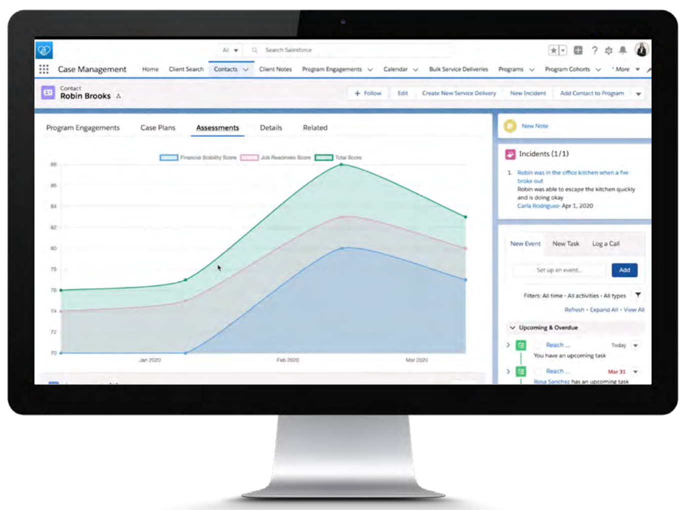
Save time and manual data entry when setting up recurring services for groups or individual participants. Service schedules allow program staff to setup multiple offerings of the same service (eg a Monday & Wednesday Group and a Tuesday & Thursday Group).

CASE PLANS

With just a few clicks, you can create a personalized service plan. Select from commonly used goals and action items or create custom ones unique to your clients' needs. Track and understand what progress has been made and what's still outstanding.

ASSESSMENTS

Determine your client's baseline status when they enter your program and visualize how their circumstances change over time by using assessments.



Assessments

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Salesforce.org is the social impact center of Salesforce focused on partnering with the global community of changemakers. We provide access to powerful technology, community partnerships, and impactful investments that empower changemakers to build a better world. As a social enterprise business unit dedicated to creating solutions for nonprofit, educational, and philanthropic organizations, we innovate on top of the world's #1 CRM, channeling the philanthropic power of our employees, customers and partners to join our global movement for good. Visit www.salesforce.org for more.