salesforce.org

SOLUTION OVERVIEW

Nonprofit Cloud for Fundraising

Introduction

Fundraising, in an increasingly digital world, requires strategies that are embedded, or led by technology. **85% of nonprofit professionals say technology is the key to the success of their organisations**, yet only 23% report they have a long term vision for technology.*

The best technology puts people first. Nonprofit technology can help you deliver donor-centric experiences that meet changing expectations and can support organisations in building trusted, lasting relationships.

Nonprofit Cloud helps you break down silos between fundraising, marketing, programmes and leadership by giving everyone a single, shared view of your organisation, supporters, and data.

The backbone of Nonprofit Cloud is the world's #1 Customer Relationship Management (CRM) system by Salesforce and the Nonprofit Success Pack (NPSP), to provide a single source of truth for all your constituent data. This allows your teams to get to know each donor, engaging on their terms to deliver exceptional experiences. Here are just a few ways it can help you now, and into the future:

- Your major gift officers can drive productivity on a modern mobile platform with instant analytics and income forecasting
- Your marketing teams can segment and craft highly personalised communications across direct mail and digital to strengthen support
- Programme teams can share transparent impact reports for specific funders
- Leadership can gain full visibility into revenue and staff performance
- IT teams can drive more innovation and automation across the organisation

Regardless of the type of people who support you, or your sources of income, Nonprofit Cloud will empower your nonprofit to leverage a unified view of supporters and revenue to create donor-centric experiences at scale to drive fundraising performance.

*Salesforce.org Nonprofit Trends Report: 2nd Edition

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Donor-Centric Experiences

One out of every two nonprofits say that competing for funds is a significant challenge today.* At the same time, people are experiencing more personalised experiences in their consumer life. Being donor-centric isn't solely a focus on people who have made the largest gift. It is an organisation-wide mindset to understand and meet the needs of constituents and potential supporters along their philanthropic journey.

These experiences build trust relationships and bring people closer to your mission with the right message, at the right time, in the right place whether digitally or in person. Creating highly personalised, timely communications and experiences helps donors feel connected to your mission, shows you're listening, and increases conversion. This mindset impacts future giving, donation upgrades, and overall donor retention.

Read Our Latest Ebook

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

READ NOW

*Salesforce.org Nonprofit Trends Report: 2nd Edition

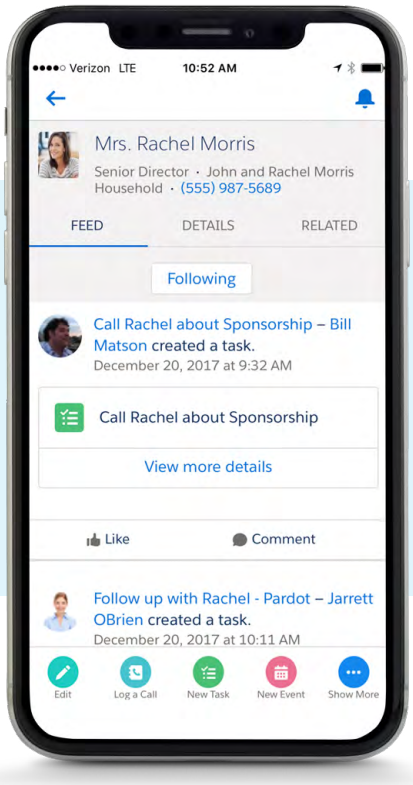
Nonprofit Cloud for Fundraising

With Nonprofit Cloud for Fundraising, you can track supporters and more easily determine how to build relationships that last to help you determine how to foster relationships.

- Constituent profiles provide a 360-degree view of your supporters and their activities whether that be a phone call, email, meeting, or anything else you want to track
- With the Household account model you have the benefit of a complete view of the household and rollups of all giving
- With Relationships and Affiliations you have an opportunity to leverage your supporters network and extend your donor base
- Donor types help you segment your donor database and 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
- Gift Entry allows you to streamline entry of large volume gifts; Recurring Donations help track and manage recurring donors - all right from within NPSP

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

Source: 2019 Salesforce.org "Voice of the Customer" Survey, an independent survey of over 1000 customers.

Data-Driven Fundraising

Good quality, up to date and reportable data in one place helps fundraisers target and connect with the right people at the right time. In today's digital world nonprofits need this consolidated data to have a full view of each supporter, their passion, and why they give to your cause. Take a minute to think about the value of your constituent data.

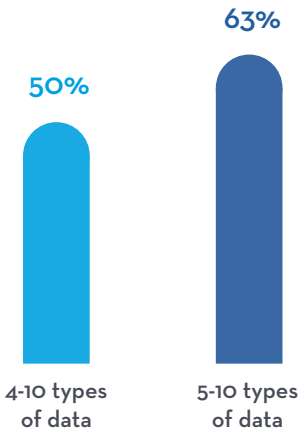
- Program interest data helps you inspire them to click "donate" from an email
- Donor preference and history helps you identify how to better connect and communicate
- Data on top donors provides an opportunity to target and acquire similar donors

These donor-centric experiences require a data-driven philosophy and strategy. As our offline and online worlds continue to blur, only technology can help you connect at scale and capture this trusted data.

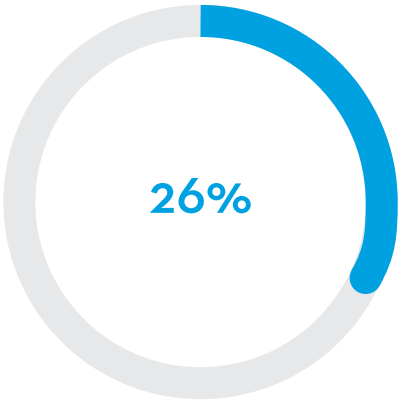
Based on our 2019 Fundraising Productivity Study, we know good data actually correlates to fundraising success. For example, nonprofits who captured more types of data such as volunteering data, organisation affiliations and programme interest, more frequently exceeded their fundraising goals.

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.**

Percent of nonprofits that exceeded fundraising goals



Percent of nonprofits that consider their data quality "good"



Download the 2019 Fundraising Productivity Report Here

Nonprofit Cloud Innovation for Data-Driven Fundraising

Batch Data Import

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 your CRM. We have also added new data mapping capabilities to save you time, enable you to process and relate an unlimited number of admin-defined objects, including custom objects, directly related to Accounts, Contacts, and Opportunities

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.

Value to You

One source of truth with a complete view of revenue coming from all sources, with reduced manual effort of data entry for your staff and reduced human error.

Watch Our Webinar

Data-Driven Fundraising

WATCH NOW

Learn More

See how products and features within Nonprofit Cloud give you a connected view of Fundraising

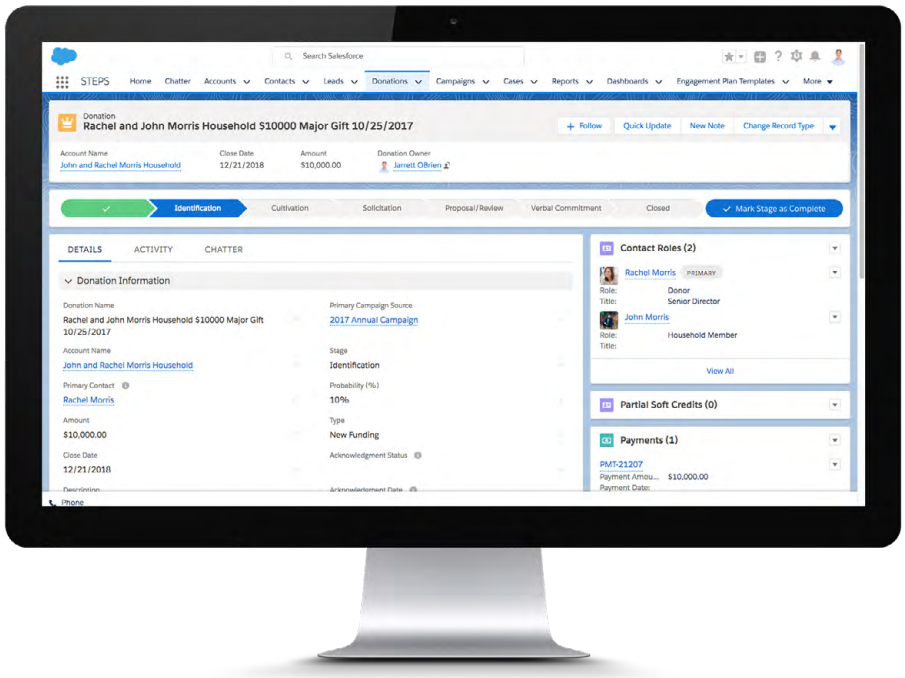
READ NOW

Donation & Income Management

Funds are the lifeblood of your nonprofit's mission. Nonprofit Cloud empowers your organisation 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 sources and mitigate risk of losing a big grant or major gift. 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 donation, recurring, in-kind gift, grant, earned income, membership, 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
- Interact with views and forecasts enable to group by moves management stages or that enable you to group by probabilities of closing larger donation or grant opportunities
- Organisation affiliations, automation of communications/tasks, and automated soft credits drive productivity in gaining that next corporate match



Value of Donation & Income Management

One source of truth with a complete view of revenue coming from all sources, with reduced manual effort of data entry for your staff and reduced human error.

Nonprofit Cloud Innovation for Donation Management

Gift Entry

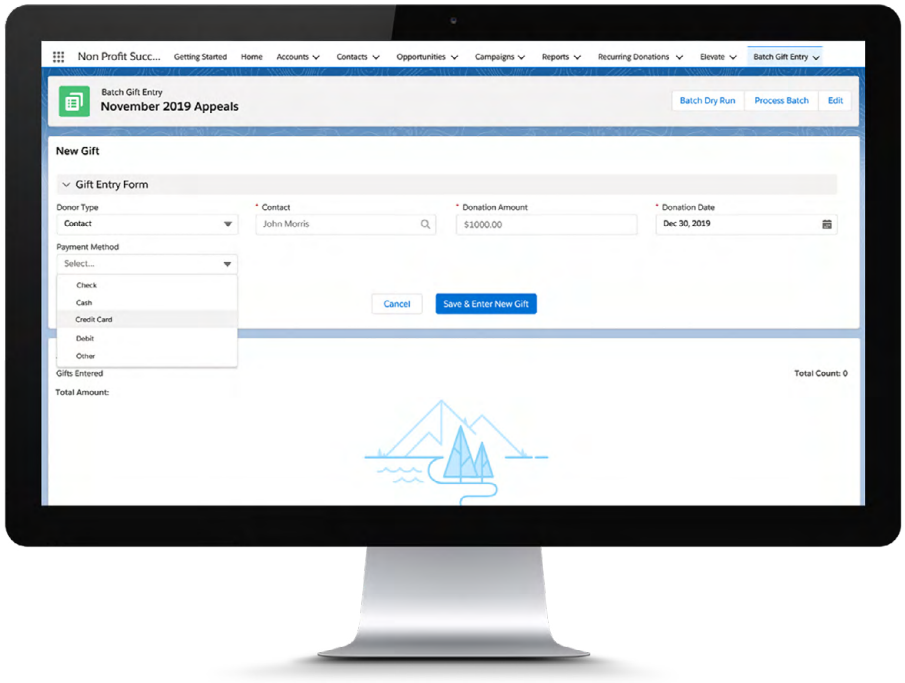
Gift Entry allows users to enter batch and single gifts into the CRM in a way that is accurate, fast, and flexible. Gift entry now has flexible templates that allow customisation, embedded editing of donor data, automatic batch numbering, and payment processing for credit cards.

Accounting Subledger

Accounting Subledger prepares your fundraising information for your accounting system. It connects fundraising and finance by ensuring consistent revenue, payment, and other accounting data across all of your activities and maps to over 20 accounting systems.

Recurring Donations

Recurring donations has an easy to use experience, with flexibility for nonprofits to manage their most committed supporters, and provide key reports for forecasting revenue – all from within NPSP.



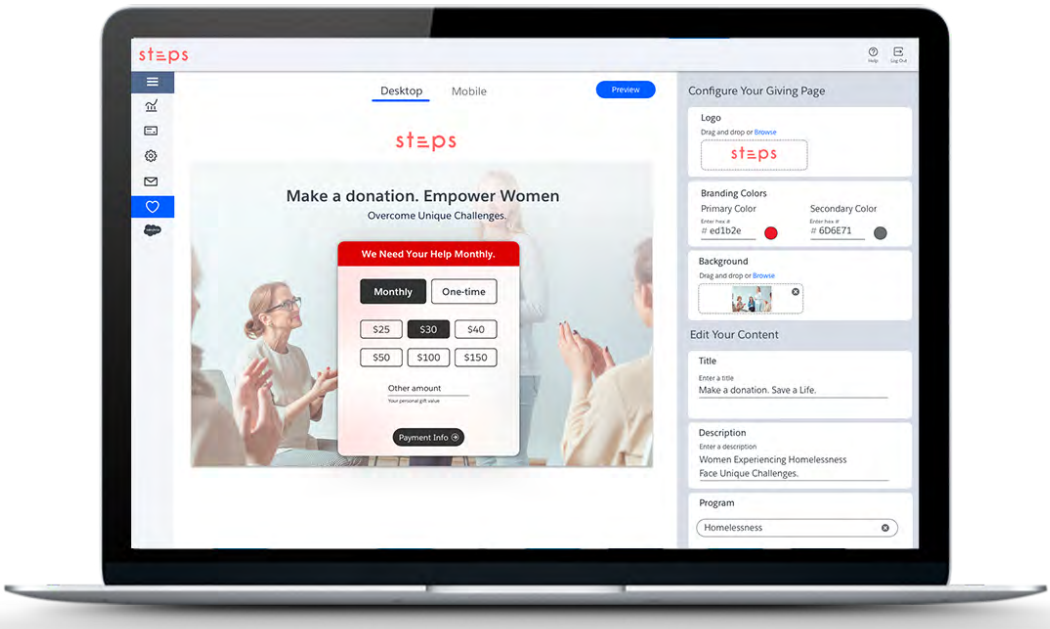
Source: 2019 Salesforce.org "Voice of the Customer" Survey, an independent survey of over 1000 customers.

Digital & Online Fundraising

Many nonprofits are combining their efforts in direct mail to digital and online fundraising efforts to reach new audiences at lower cost. The Nonprofit Success Pack has out of the box capabilities to manage donors. Nonprofit Cloud has new capabilities with a comprehensive suite of online fundraising tools, and you can **connect to an entire ecosystem of digital fundraising apps** for Peer to Peer fundraising, ticketing, and more.

Tap into modern fundraising capabilities that allow you to acquire and convert new donors at less cost and effort. Many customers also leverage the AppExchange to connect to thousands of other digital fundraising products.

- Seamlessly track data on campaigns, donors, single donations, recurring donations, teams, registrations and tickets from fundraising apps
- Create responsive online donation forms and track donations to constituent and household records
- Use modern, integrated Peer to 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 tools
- Build or integrate your own apps via our Application Programmer Interfaces (API's) or on Heroku, our platform as a service (PaaS) to build cloud applications for fundraising



Building Great Supporter Experiences Together With Our Partners

Fundraising is evolving – and fast. New payment technologies and income channels are evolving to meet donors preferences and help nonprofit organisations build and grow their donor base. It means that nonprofits require a special set of tools to meet new digital and online donation experiences in addition to regular payments.

Payment apps developed for nonprofits are available on the Salesforce AppExchange. We're thrilled that our partners are making it easier for nonprofits to accept **donations in multiple currencies and different payment methods.**

FINDOCK

FinDock adds native end-to-end payment management to Salesforce. As a Customer Payment Management platform, FinDock provides all the tools to leverage both online and offline payments, along with the latest digital fundraising technology, from the heart of your donor profile. Generate unique payment requests such as QR codes for campaign mailers, launch fully integrated fundraising web pages, schedule and collect recurring direct debit donations. Automatically match bank statements with payments in your database through advanced guided matching. With support for national and regional payment requirements and an open architecture, changing methods and processors is simple. You have the capability to grow and the flexibility to be where your donors are.

RaiseNow

RaiseNow offers an online fundraising solution for donor facing touch points that are extremely flexible and integrated with payment service providers. It facilitates international and local payment integrations (PCI-DSS certified) to support donations in multiple countries. With payment data captured in the same CRM platform as your donation and donor data, processes can be automated to drive greater efficiencies and improve the supporter's experience. Social, Peer to Peer and Face to Face fundraising capabilities enable nonprofits to grow donor reach and increase income streams from its fundraising efforts.

For payment services and online fundraising tools, please see the Salesforce AppExchange.

GO THERE NOW

Multi-Channel Marketing & Engagement

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

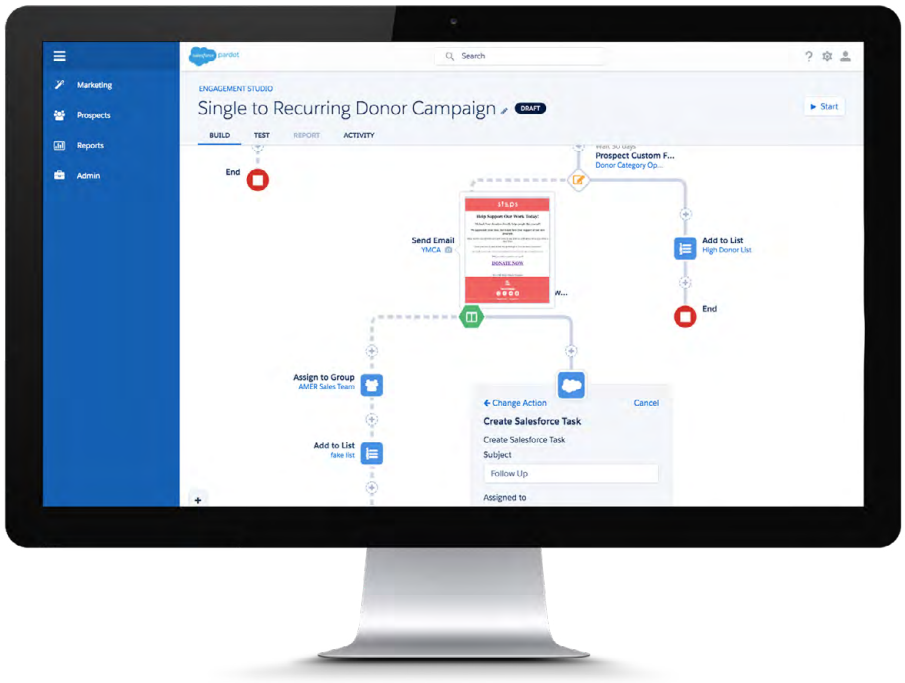
With Nonprofit Cloud, you can grow your funds raised by incorporating your existing direct mail strategy with online frictionless payment and a quick access to data and personalise content in every channel based on what users prefer. In short, it provides a complete and seamless multi-channel experience.

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 analyse who's visiting them, without the need for IT help
- Ensure accurate addresses, personalise and track your mailings to raise and save money on direct mail
- Use scoring and lists to better segment and know your supporters based on their clicks and behaviour
- Leverage dynamic content to personalise 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 adds and capture across dozens of channels
- Connect donors and supporters to a digital community for self-service and support

Value of Multi-Channel Marketing

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



Nonprofit Cloud Innovation

Salesforce.org Insights Platform Data Integrity

Easily cleanse your data, making it accurate, complete, and reliable. Insights platform automatically converts all of your mailing addresses to your country's postal standards, updated automatically by the U.S. National Change of Address (NCOA). Contacts are deduplicated based on this data for your entire list.

Insights Platform Data Integrity language localization and availability of the NCOA feature differs by country. Please contact us for specific availability.

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
- Track inputs and outcomes, and impact and transparently share personalised 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 optimise your campaigns and use metrics to maximise 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 visualise trends in revenue with analytics

Nonprofit Cloud Innovation

Fundraising Performance App

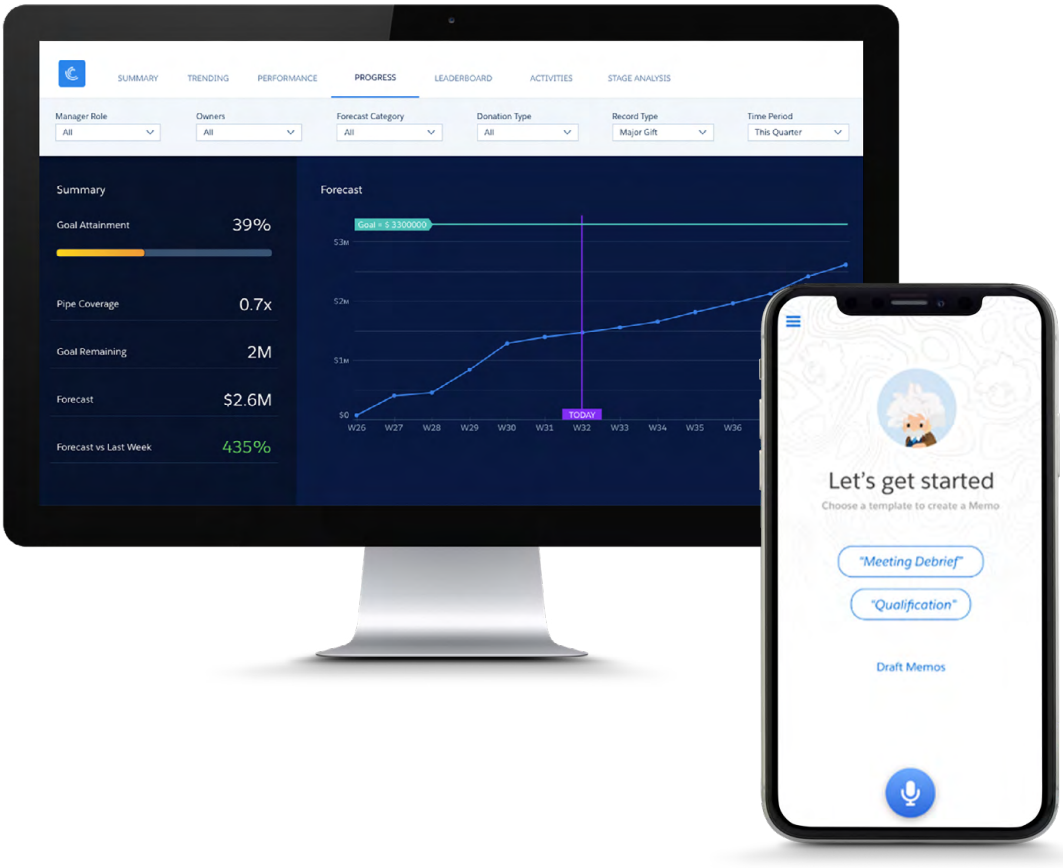
Tableau CRM (formerly Einstein Analytics) has an app for nonprofit fundraising leaders to help you gain a better understanding of how your key performance indicators and metrics are trending over time.

Prediction Builder

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

Einstein Voice Assistant

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 realise 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 offerings provide 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 organisation
- Every week, join our partner **office hours sessions** and ask your pressing questions
- 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 basic use cases

See all the nonprofit training options

Get Started Now

Nonprofit Fundraising Page

Fundraising Overview Demo

Take the Fundraising Trail

Take the Nonprofit Success Pack Trail

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 organisations, 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.

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