



# Complete Guide to Salesforce for Nonprofits

Discover how to make smarter decisions and achieve sharper processes to deliver greater social impact

A PLATFORM FOR GOOD



# Contents

- Introduction: Changing the world for good ..... 3**
- A platform for impact ..... 4**
- Get connected with Nonprofit Cloud ..... 5**
  - Where to start ..... 6
  - Program Management ..... 6
  - Fundraising ..... 6
  - Engagement ..... 7
  - Analytics ..... 7
- Beyond the Platform ..... 8**
- Nonprofit Trailblazers success stories ..... 12**
- Salesforce supports the Sustainable Development Goals ..... 22**



## Introduction

# Changing the world for good

Technology is the most powerful equalizer of our time, unlocking data, expanding knowledge, and – above all – building connections. Salesforce.org puts the world’s best technology in the hands of nonprofits and educational institutions, so they can connect with colleagues, supporters, and beneficiaries to maximise their impact.

At Salesforce.org, we empower nonprofits to make smarter decisions and achieve sharper processes to deliver greater social impact. We believe in coming together to create a better future for everyone.

Learn how you can make better connections with colleagues, supporters, and beneficiaries to build a better world.





## A platform for impact

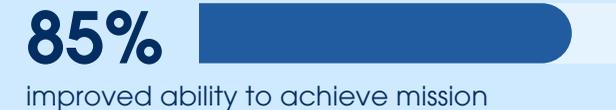
**Transform your processes, empower your teams, and fast-track your goals with Salesforce.**

For a small nonprofit, maintaining spreadsheets and jotting down notes about beneficiaries and donors may be a simple process. But as the organisation grows, it will quickly become apparent that this is not a scalable system, and information and processes will become siloed.

This is where CRM comes in. CRM stands for 'customer relationship management', but at Salesforce it means so much more than that.

Nonprofit Technology built on the Worlds #1 CRM. With a single, scalable platform, nonprofits can finally achieve the coveted 360-degree view of their organisation. Better visibility translates into greater efficiency, deeper insights, and richer connections, which will enable you and your team to focus on what matters: achieving your mission and driving impact.

Average improvements reported from .org customers





## Get connected with Nonprofit Cloud

Nonprofit Cloud is the only platform for nonprofits that can power your entire mission: track and measure your impact in real time, raise more funds with AI-driven insights on your donors, and take your constituents on more personal journeys.

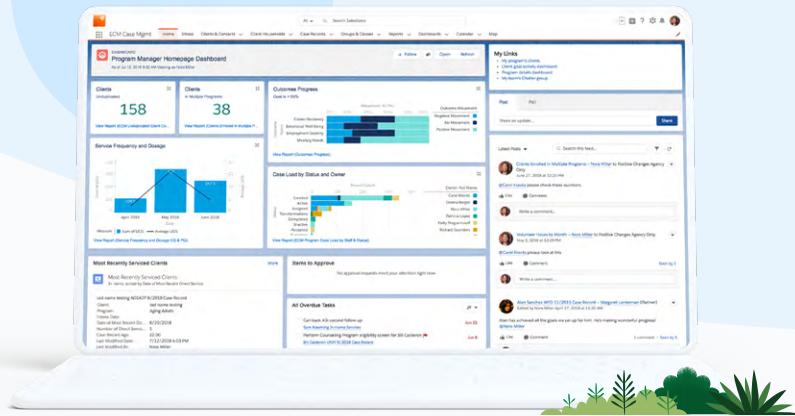
### In this section, you'll discover how to:

- Manage your entire mission with one Integrated CRM
- Connect client, program and service data to deliver, measure and optimise programs faster and increase their impact, at scale
- Leverage a unified view of supporters to improve the donor experience and fundraising performance
- Use insights to create highly personalised constituent experiences to build lasting trusted experiences



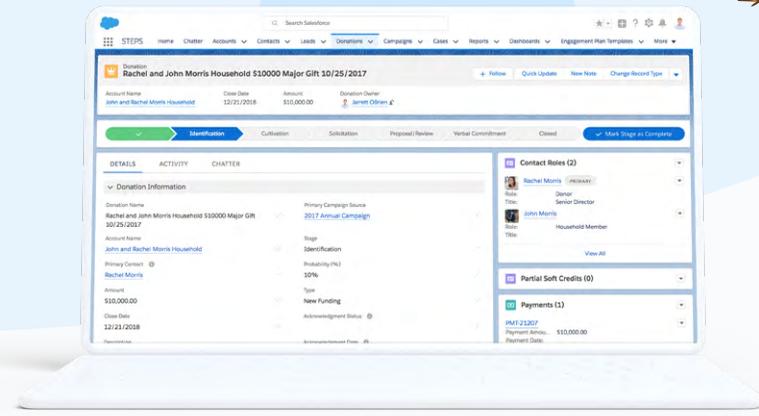
# Where to start

## Nonprofit Cloud



## Program Management

The backbone of any nonprofit's mission is the programs and services it provides. Managing programs effectively means tracking processes and measuring outcomes. Nonprofits are embracing Nonprofit Cloud for program management because of its flexibility. Every nonprofit works in its own unique way, but our platform is customisable with point-and-click tools – minimising coding required.



## Fundraising

Having a complete view of every supporter is key for building long-term relationships. With our platform, all of your donor and supporter information is available in one place, giving you full visibility of all the different ways you're engaging with supporters, what their interest in your organisation is and their complete history with you. And with better insight into who is supporting you, you can create an optimised moves management strategy that nurtures people to a deeper level of engagement.





## Beyond the platform

In this section, you'll discover:

- There are multiple support systems in place to help you along your journey to success
- 10 free licenses for eligible nonprofits
- An active Community of over 50k+ organisations ready to help



## Beyond the platform

When you're part of the Salesforce.org community, you're never alone. We're not just a technology platform; we're a community-driven movement.

When you activate your Salesforce subscriptions, you also get access to The Power Of Us Hub – a onestop resource centre and online community of over 50,000+ nonprofit Salesforce users. As well as accessing product training, documentation, and resources, you can engage with your peers, community MVPs, Salesforce.org employees, and partners. Trailhead is a fun, free way to learn about Salesforce. With hundreds of modules covering virtually every part of the platform, you and your staff can become Salesforce experts in no time.

Based on the support needs of your NGO, we offer a variety of Success, Advisory and Strategic Services, such as Premier Success, which gives you 24x7 access to Salesforce experts. We also offer Accelerators, Customer Success Architects, and other paid services.



### Ready to give it a go?

We give eligible organisations 10 CRM licenses absolutely free through The Power of Us Program, and you can make big savings on additional subscriptions.





## The Power of Us program

**More than 40,000 nonprofits, foundations, and higher education institutions use Salesforce through The Power of Us Program.**

Join our community for instant access to the Power of Us Hub – a one-stop resource centre with a wealth of best practice documents specifically tailored to the needs of nonprofits. Engage with other organisations, connect with employees, meet recognised nonprofit technology experts in our community, and join the App Advice and Consumer Reports group to compare apps and find out from others what they're using.

As well as 10 free Enterprise Edition CRM subscriptions (subject to geographic restrictions), you can get discounts on additional subscriptions, products, services, training, AppExchange apps, and event tickets. Not to mention access to nonprofit and specific user groups, events, and webinars to help you on your way.

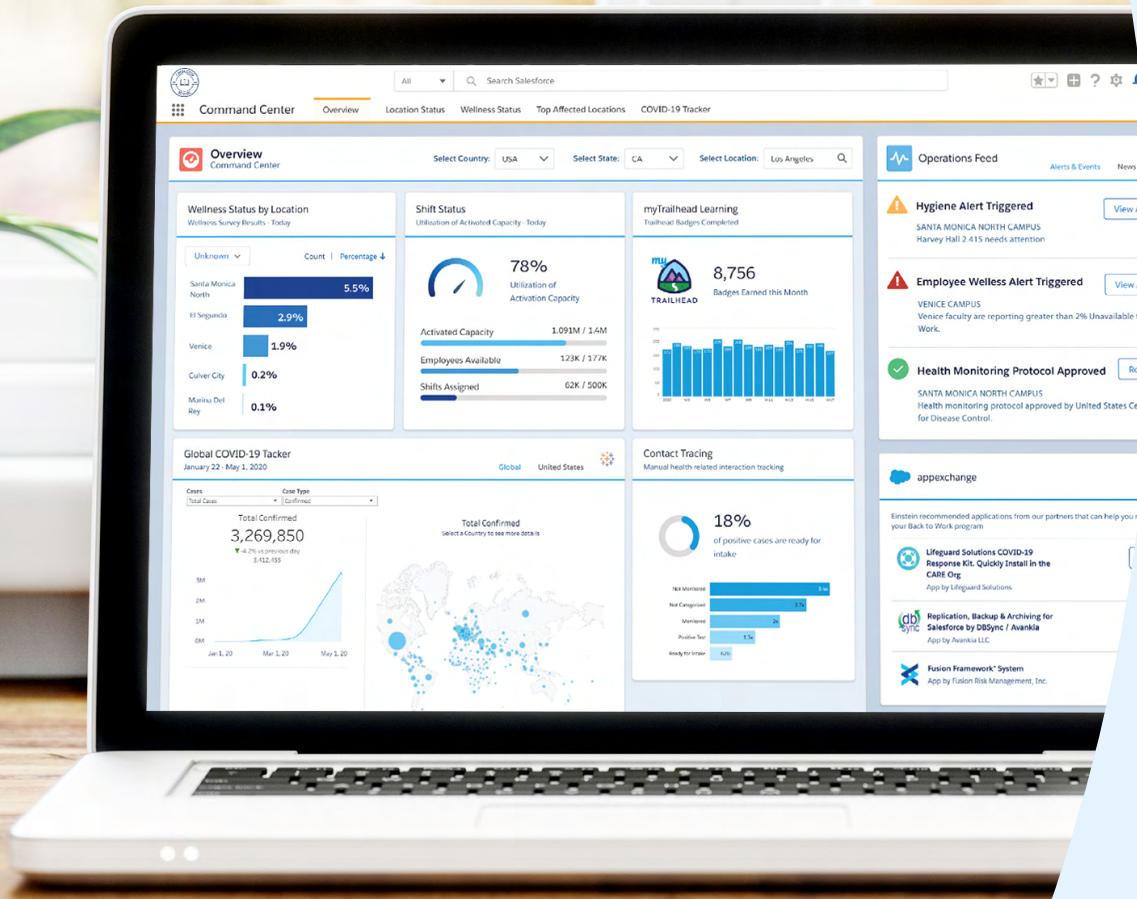
# Is your organisation eligible?

To qualify for a free licence, your organisation must be recognised as a charitable, nonprofit, nongovernmental, educational, or social change organisation in the country where you are located.

Your organisation must provide legal documentation showing that you meet the above criteria.

[View Guidelines](#)





# Nonprofit Trailblazers success stories

In this section, you'll learn how:

- SCOUTS New Zealand transformed to reach 25,000 young people by 2025
- Community Vision is setting the benchmark for efficient and innovative care
- Surf Life Saving NSW is driving purposeful growth through process efficiencies
- Cure Cancer raises 226% more funds using Salesforce





## How SCOUTS New Zealand fast tracked its digital transformation to bring scouting online

SCOUTS New Zealand enables 13,000+ young people to enjoy new adventures, make new connections, gain confidence and build resilience. In the six months leading up to the COVID-19 pandemic, the nonprofit had been working with Salesforce and partner GravityLab on a plan to help mature its operations and deliver programs that enabled scouts to take ownership of their experience. By March 2020, it became clear that in order to reach this goal, and to keep operating, they had to adopt a digital mindset and accelerate their transformation project to move online.

Speed was also critical for SCOUTS New Zealand since the only way of sustaining relationships - and providing members with value - was to move online, and still ensure a safe and secure environment for young people.

The solution delivered by Salesforce and Gravity Lab allowed SCOUTS New Zealand to stay connected with scouts at this time and deliver programs that help them build resilience. The solution has also put a strong foundation in place for SCOUTS New Zealand to achieve its long term goals, including reaching 25,000 young people by 2025.



“Young people today see the internet through apps, and Salesforce helps us to engage with them in this space and to give them the tools to create and own their scout adventure.”

**Joshua Tabor, CEO of SCOUTS New Zealand**

**Read the full story of how SCOUTS New Zealand  
accelerated their digital transformation**

[Read now](#)





## Community Vision uses technology to scale and grow by freeing up 45% of back office resources

Community Vision is a not-for-profit community-based organisation which provides services to people of all ages and abilities. They have been on a two-year transformation journey to reduce the cost of service delivery while providing clients with a better experience.

Salesforce is central to this transformation and has aided Community Vision's fast response to COVID-19, enabling them to quickly pivot to provide home care remotely. Salesforce is also helping them set a new benchmark for community care by leveraging automation to minimise the time and cost of administration and enable everyone to focus on client service.

Using Nonprofit Cloud, Community Vision has consolidated systems and digitised data to enable a single view of clients and a better experience across all touchpoints.



“Funds are limited in our sector and it’s important to direct the most of each dollar we can towards care. Salesforce allows us to do this by leveraging automation.”

**Yvonne Timson, Chief Operating Officer**

**Read the full story of how Community Vision set the benchmark for efficient and innovative care**

[Read now](#)





SURF LIFE SAVING  
NEW SOUTH WALES



## Surf Life Saving NSW achieves an 80% reduction in time to create and launch campaigns

Surf Life Saving NSW has held the same mission for over 110 years which is to 'Save Lives, Create Great Australians, and Build Better Communities'. The organisation's 129 Surf Life Saving Clubs deliver on its mission in the most visible way and sits at the heart of many Australian communities. What's less visible is the vital work carried out by the organisation's fee-for-service arm, which had experienced exponential growth, and to keep growing at that rate, needed to streamline and automate its processes.

With Salesforce, they were able to scale efficiently and ultimately increase the funds raised for its charitable services. They were able to do this by centralising data, digitising and streamlining end-to-end procurement processes and creating a central view of clients and relationships.



“With Salesforce, we can now move from quoting to invoicing to receiving payment within an hour which is amazing for a charity.”

**Holly Chave, Academy Business Manager**

**Read the full story of how Surf Life Saving NSW  
created waves of efficiency**

[Read now](#)





## Cure Cancer raises 226% more funds using Marketing Automation

Established in 1967, Cure Cancer is the only charity in Australia dedicated to funding early-career cancer researchers. These researchers offer pioneering approaches to curing all types of cancer, but they're underfunded in comparison to more senior researchers. Like most charities, Cure Cancer operates with limited resources and its small team previously struggled to manage the huge task of donor engagement. They were looking to deepen engagement with current donors and personalise their journey, reach more people and reduce manual effort and costs.

With Salesforce, they were able to get a complete view of donors, including previous donations and interactions with Cure Cancer, and enable more efficient and personalised communications with donors and researchers. Through Einstein Analytics they received insights on donor behaviour to enable greater personalisation and more effective campaigns.



“By using technologies like Salesforce, we can continue to enhance the experience of our donors and customers, providing them with tailored personalised communications.”

**Nikki Kinloch, CEO**

**Read the full story of how Cure Cancer raised more funds using Salesforce**

[Read now](#)





## Join the CRM revolution

Nonprofits of every shape and size, dedicated to all sorts of causes, are using Salesforce to connect their organisations and power their missions. In today's connected world, it is more important than ever to run your nonprofit on a single platform. By joining our community of nonprofits, you will be able to take smarter decisions, encourage richer collaboration, and achieve greater impact in new ways.

# Salesforce supports the Sustainable Development Goals

Salesforce is committed to advancing the SDGs through our operations, our technology, and our partnerships.

The Sustainable Development Goals (SDGs) are the global to-do list for people and the planet by 2030. Adopted by all 193 member states of the United Nations in 2015, they are an urgent call for multisectoral action now and throughout this decade. The SDGs provide a shared framework to tackle the world's most pressing social, economic, and environmental challenges.<sup>1</sup> For more info on how we are aligned with the SDGs, please read our [Stakeholder Impact Report](#) and [Community Impact Report](#).



<sup>1</sup> The content of this publication has not been approved by the United Nations and does not reflect the views of the United Nations or its officials or Member States.



**Discover how Salesforce for Nonprofits can help you  
improve efficiency and accelerate your impact.**

[Get Started Today](#)