

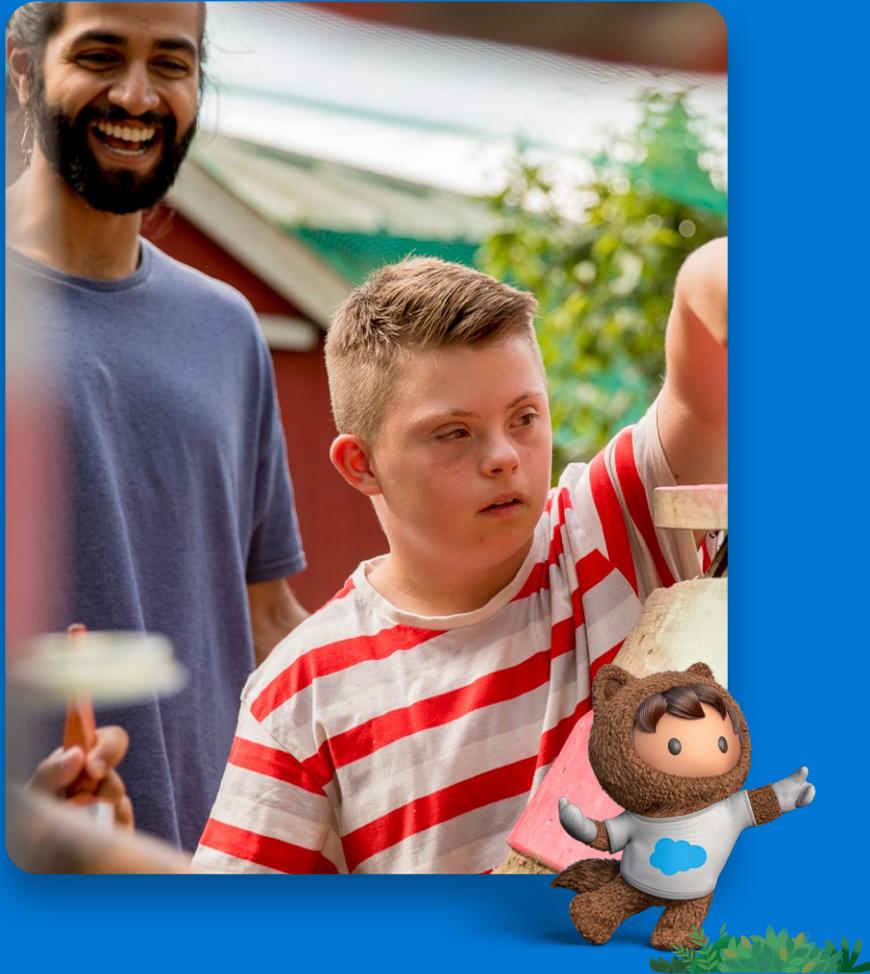
SOLUTION SNAPSHOT



 [salesforce.org](https://www.salesforce.org)

# Salesforce for Grantmakers

Connect, deliver and grow your philanthropic mission



## Introduction

Manage your entire philanthropic giving with solutions for grants management, communications, grantee engagement and more with Nonprofit Cloud. Leveraging the #1 CRM in the world, your organization can understand outcomes your funds are making, adjust your grantmaking to meet the needs of those you serve, or help you expand into new program areas. Because the right technology helps you ensure that communities receive the investments they need to build resilience for an ever-changing world.

**Let's take a look at the products available for grantmaking**

## Build better relationships

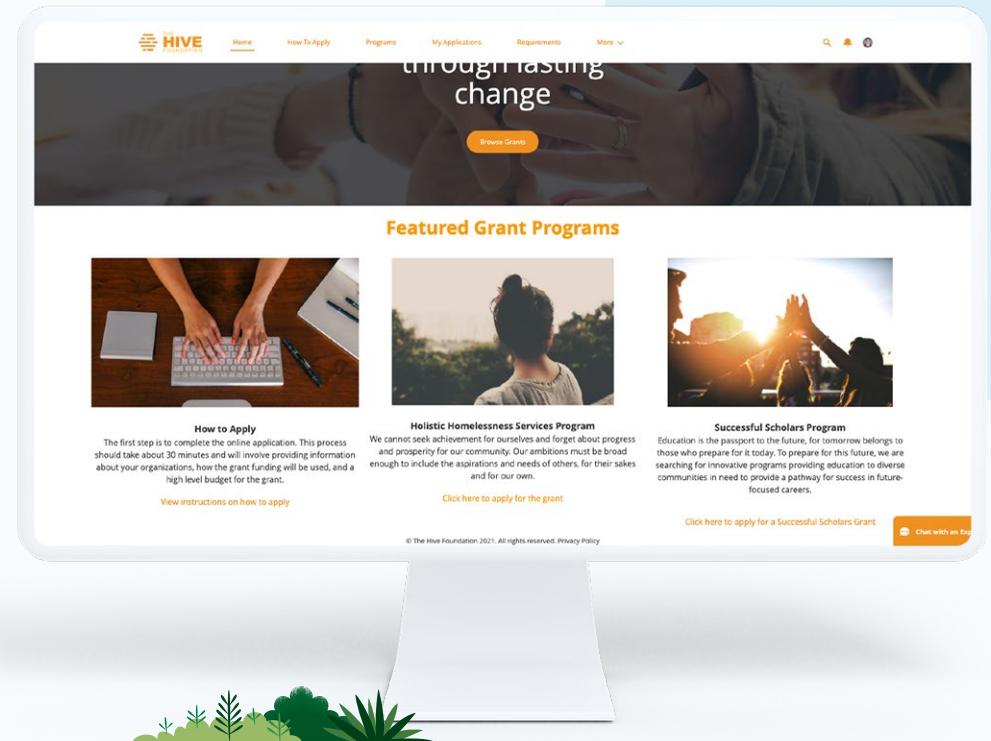
Products: Salesforce Constituent Relationship Management (CRM)

While funding is your primary operation, at the heart of it all is relationships—and many of those relationships start before a grant is even created or an application is submitted. Salesforce’s CRM makes it easy to manage information on all of your constituents in a single place. From organizational point of contact to connections to board members current and former staff, etc. This helps you get a sense of who you’re working with and create meaningful engagements with prospective grantees, awardees, fiscal sponsors, partners, board members, advocates and more.

## Manage grant programs

Products: Outbound Funds Module and Grants Management

No matter how many funding programs you have, it can be tedious to keep up with the planning, tracking and shepherding of grants across your entire organization. With Salesforce Grants Management, provide visibility for all teams into the funding lifecycle. Connect programs and awards seamlessly to gain a holistic view of how they are driving your organization’s philanthropic mission. Streamline the application processes by setting application requirements, verifying tax status and tracking due diligence. Simplify internal reviews by sharing key application information and gather feedback in a single place. View what funds have been requested, see what financial commitments have been made, and once you're ready to grant funds, schedule disbursement amounts.



Grants Management  
Grantee Portal



## Engage with key stakeholders

Products: Grants Management Grantee Portal, Pardot

Your grantees are your customers and it's all about driving a better customer experience these days. With a customizable grantee portal, grantmakers make it easy for grantees to engage with them all in a single place. Applicants are able to find and apply for funding opportunities, see the status of applications, view disbursement schedules, securely send banking and other sensitive information and report back on outcomes. For private grants, send personalized invitations to applicants you think are the best fit. With Pardot, you can automate personalized communications so your prospective, current, and past grantees get the information they need, when they need it. And all without you having to click send on every email.

## Create community offline and online

Products: Grants Management and Experience Cloud

In addition to the Grantee Portal, more robust collaboration and tools are available using Experience Cloud. Grantees can access self-service content to navigate the grant lifecycle and even connect directly with grantmaking staff, outside of their email. Create a space for grantees to come together, share best practices, network and learn from each other.

## Connect all the dots

Products: Salesforce AppExchange

Think of the Salesforce AppExchange like your phone's app store. With thousands of apps to choose from, you can add additional functionality that directly integrates with Salesforce so all your business processes are connected and you save on IT costs. From document management to accounting, and so much more.

## Become a smarter grantmaker

Products: Tableau

Imagine if you could know what types of programs perform better so you can target the ideal grantees, adjust your funding portfolios to programs that are most effective or predict which programs would be affected most when a pandemic hits. Tableau takes reporting to the next level by analyzing trends to make data-driven decisions on how to make grant dollars go further.

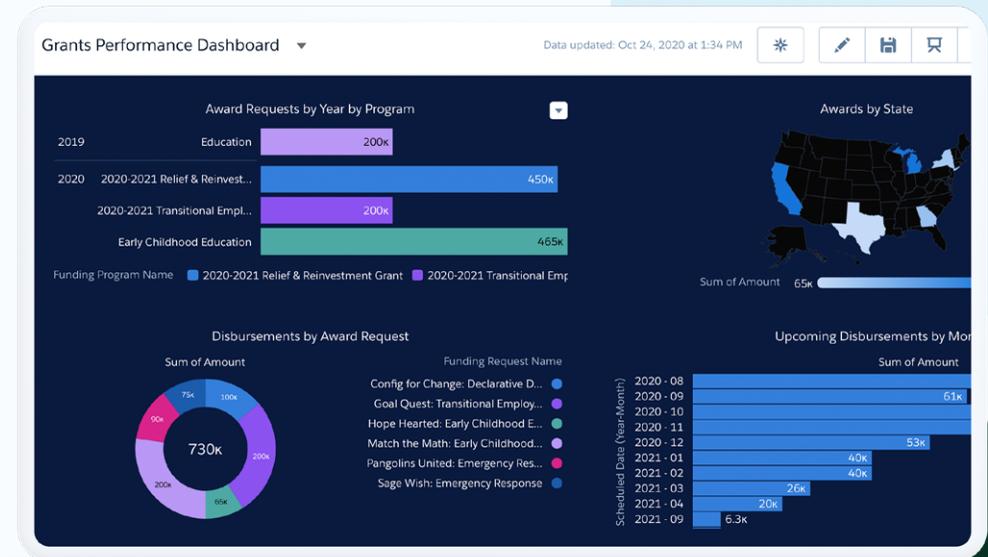


Tableau Dashboard



“With Salesforce, we create positive experiences for our grantees while also acquiring valuable insights to help us remain agile to quickly address the issues of today, and solve for the challenges of tomorrow.”

Hannah Kahn  
Vice President, Grants Management  
Arnold Ventures



Want to learn more about Nonprofit Cloud for grantmaking?

[Learn more](#)