



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

SOLUTION OVERVIEW

# Nonprofit Cloud for Fundraising

A guide to growing donor relationships more effectively

## 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 organizations**, 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, programs and leadership by giving everyone a single, shared view of your organization, 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 personalized communications across direct mail and digital to strengthen support
- Programs 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 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.



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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

Nonprofit Recipes for Success  
*A guide to digital transformation  
in the new normal*

[Read now](#)



## Nonprofit Cloud for Fundraising

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

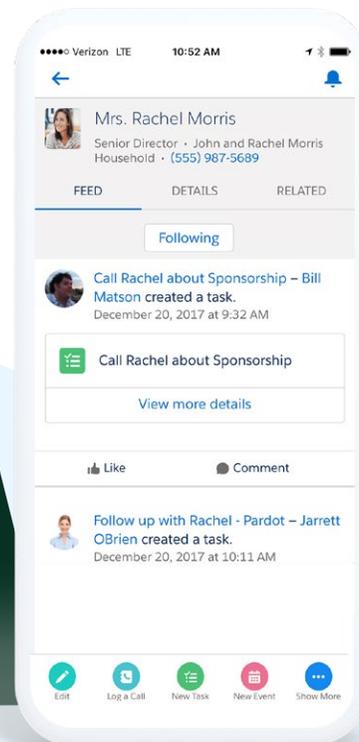
- Constituent profiles provide a 360-degree view of your supporters and their activities whether that be a phone call, email, meeting, or anything else you want to track
- With the Household account model you have the benefit of a complete view of the household and rollups of all giving
- With Relationships 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.

## Get Started with Nonprofit Cloud

Looking to get your nonprofit started with a CRM? Nonprofit Cloud is now available as a curated solution with various pricing options. With powerful AI and data tools, you can now get started with core capabilities you need to drive your mission.

### Pricing for Nonprofit Cloud

[Learn more](#)



# 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.

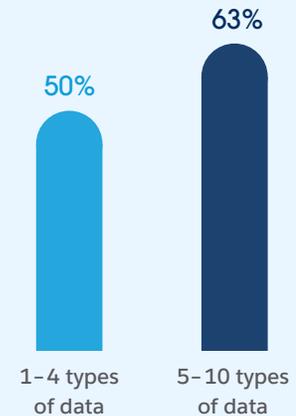
Based on our 2019 Fundraising Productivity Study, we know good data actually correlates to fundraising success. For example, nonprofits who captured more types of data such as volunteering data, organization affiliations and program interest, more frequently exceeded their fundraising goals.

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.**

Learn more in the **2019 Fundraising Productivity Report**

[Read now](#)

## Percent of Nonprofits That Exceeded Fundraising Goals



## Percent of Nonprofits That Consider Their Data Quality “Good”



## Nonprofit Cloud Innovation for Data-Driven Fundraising

### [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 duplicated based on this data for your entire list.

### [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.

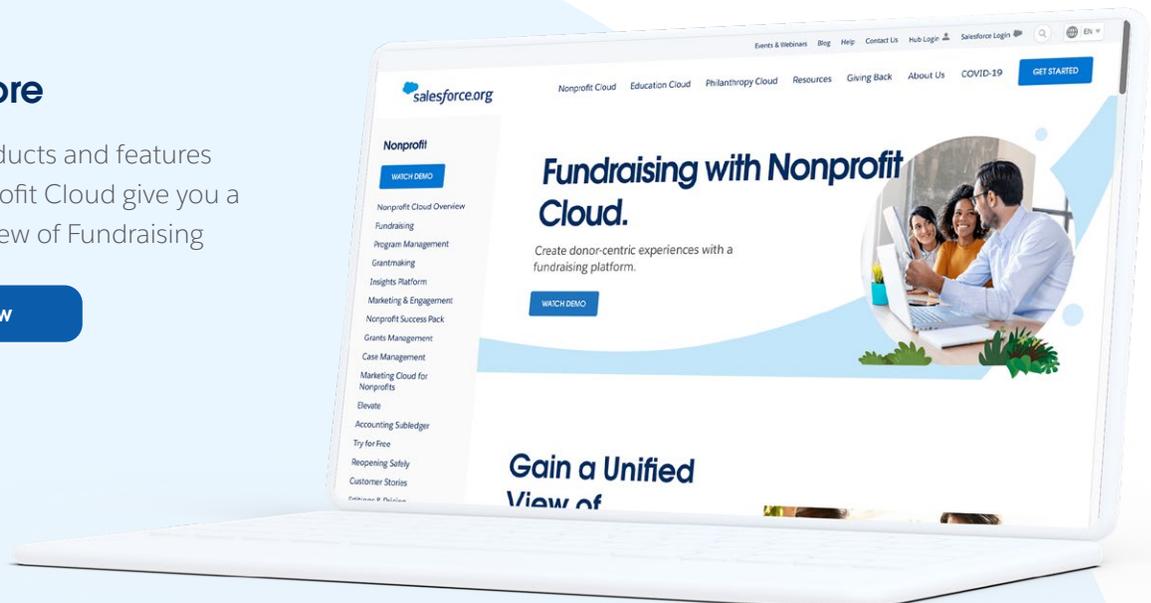
## Value of Data for Fundraising

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.

### Learn More

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

[Read now](#)

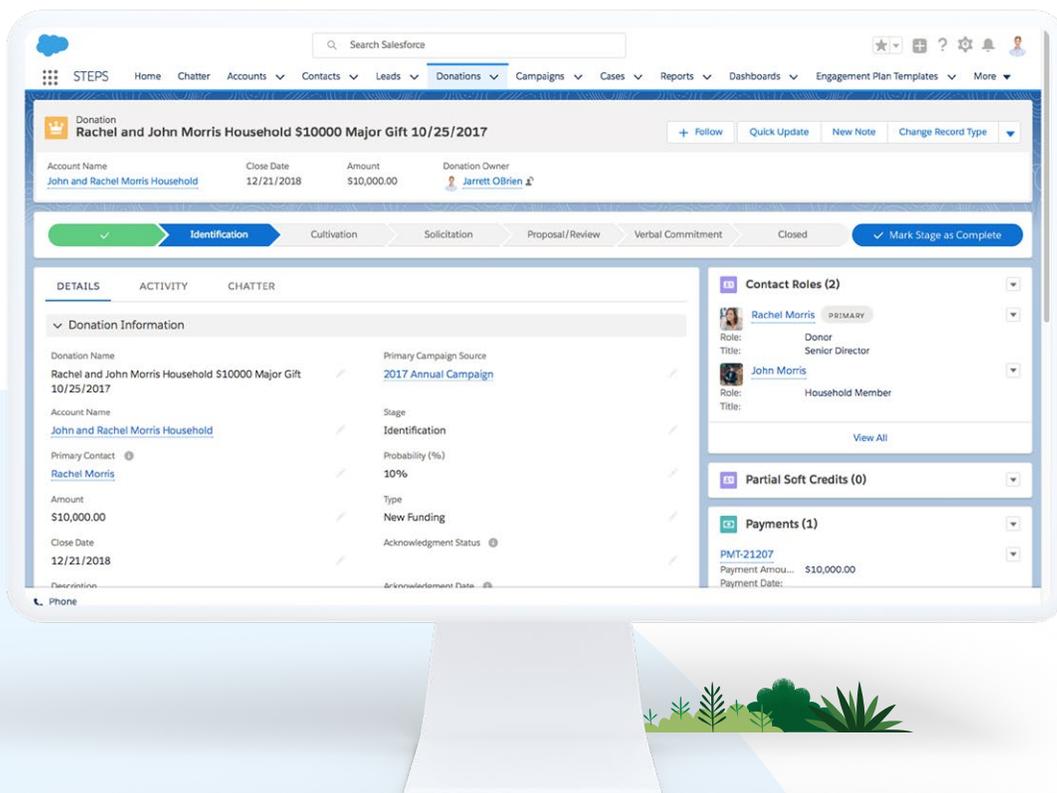


# Donation & Income Management

Funds are the lifeblood of your nonprofit's mission. Nonprofit Cloud empowers your organization 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 various views to better understand moves management stages or probabilities of closing larger donation or grant opportunities
- Organization affiliations, automation of communications/tasks, and automated soft credits drive productivity in gaining that next corporate match



The screenshot displays the Salesforce Nonprofit Cloud interface for a donation record. The top navigation bar includes 'STEPS', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Leads', 'Donations', 'Campaigns', 'Cases', 'Reports', 'Dashboards', 'Engagement Plan Templates', and 'More'. A search bar is located in the top right. The main content area shows the donation details for 'Rachel and John Morris Household \$10000 Major Gift 10/25/2017'. The record is owned by Jarrett O'Brien. The donation is in the 'Identification' stage, with a close date of 12/21/2018 and an amount of \$10,000.00. The primary campaign source is the '2017 Annual Campaign'. The account name is 'John and Rachel Morris Household'. The primary contact is Rachel Morris. The donation type is 'New Funding' and the acknowledgment status is 'Acknowledgment Status'. The interface also shows 'Contact Roles (2)' for Rachel Morris (Donor, Senior Director) and John Morris (Household Member), and 'Payments (1)' for PMT-21207 with a payment amount of \$10,000.00.



## 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](#)

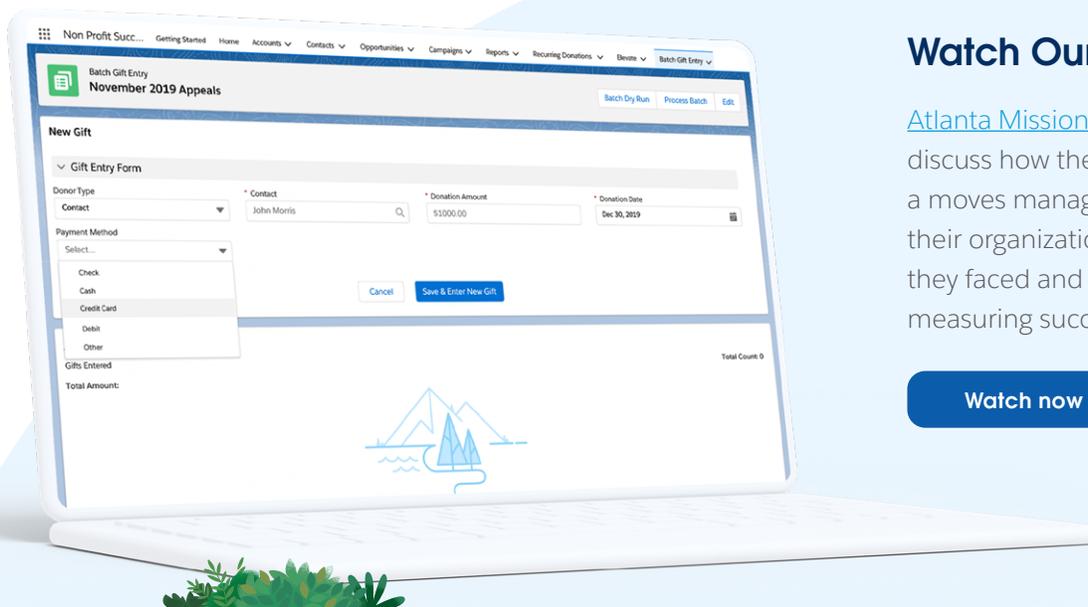
Gift Entry allows users to enter batch and single gifts in to the CRM in a way that is accurate, fast, and flexible. Gift entry now has flexible templates that allow customization, embedded editing of donor data, automatic batch numbering, and payment processing for credit cards.

### [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.



## Watch Our Webinar

[Atlanta Mission](#) and [buildOn](#) discuss how they've implemented a moves management strategy at their organization, the challenges they faced and how they're measuring success.

Watch now

## 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. Elevate, a paid product within Nonprofit Cloud includes online donation forms and integrated payment services. 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

## Value of Digital Fundraising

[buildOn increased online giving by 130%](#) with the Nonprofit Success Pack, Experience Cloud, and our software partner for peer-to-peer giving, Classy.

### Hear Their Story

Building Great Supporter Experiences

Watch now



## Nonprofit Cloud Innovation for Digital Fundraising

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.

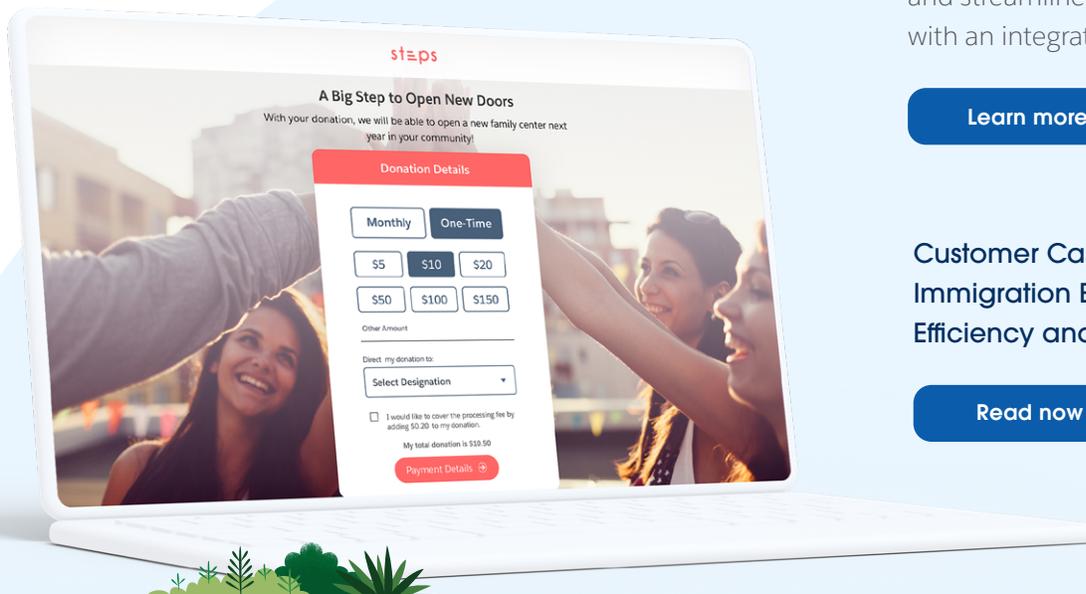
### Salesforce.org Payment Services\*

A payment processing solution that allows you to accept payments from the gateway and processor of your choice using Giving Pages or an extensible web API that integrates into the Nonprofit Success Pack.

### Giving Pages\*

A customizable digital fundraising solution for one-time or recurring donations that simplifies the creation of donation forms for your online presence while conforming to your branding and configuration requirements, fully integrated with Payment Services.

*Salesforce.org Payment Services and Giving Pages are part of a fundraising suite called Elevate that is integrated into the Nonprofit Success Pack.\**



## Elevate

Create a smooth donor experience and streamline back end functions with an integrated donation platform.

[Learn more](#)

**Customer Case Study:**  
Immigration Equality Increases  
Efficiency and Visibility

[Read now](#)

\*Salesforce.org Payment Services and Giving Pages (known together as Salesforce.org Elevate) is limited to United States-based customers transacting in U.S. dollars.

# Multi-Channel Marketing & Engagement

Today's supporter wants to be engaged on their terms in highly personalized, 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 personalize content in every channel based on what users prefer. In short, it provides a complete and seamless multichannel experience.

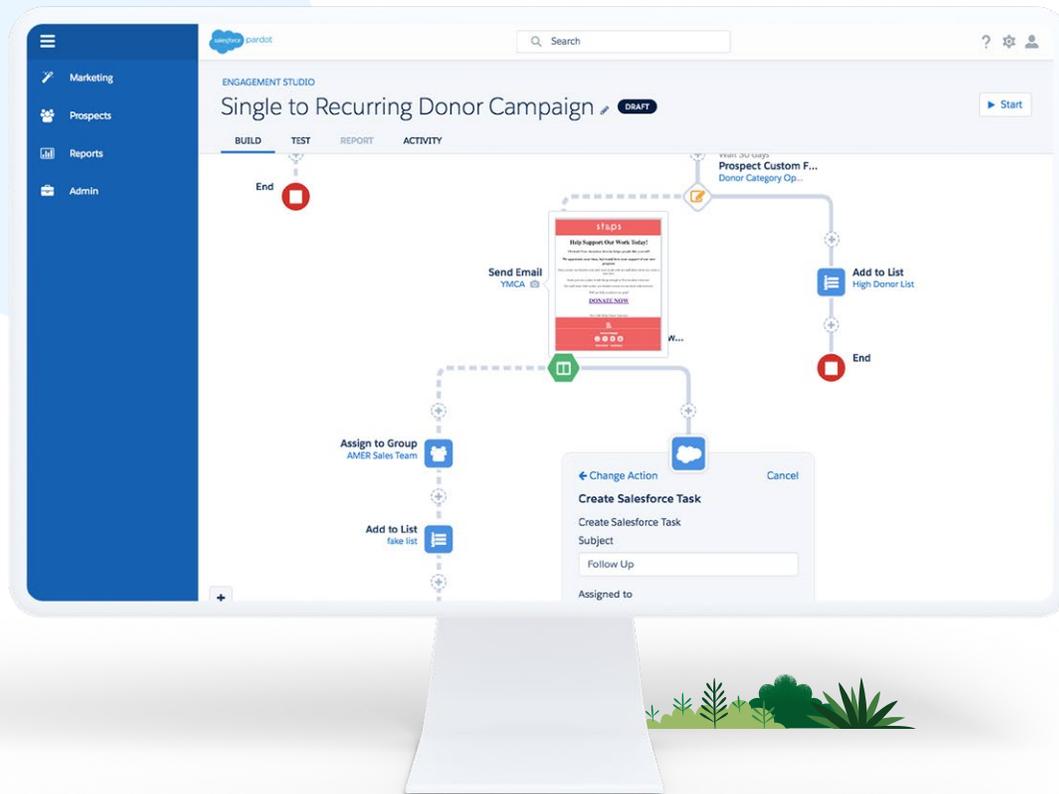
Leverage fully integrated omnichannel marketing tools that drive engagement and conversion.

- Build compelling landing pages, forms, and emails that boost your pipeline with quality prospects and analyze who's visiting them, without the need for IT help
- Ensure accurate addresses, personalize 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 behavior
- Leverage dynamic content to personalize 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 Advertising Studio to help shape your donor acquisition to build audiences, place ads and capture across dozens of channels
- Connect donors and supporters to a digital community for self-service and support
- Link supports to donation pages with personalized ask amounts and prefilled forms to maximize conversion



## Value of Multi-Channel Marketing

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



## Nonprofit Cloud Innovation for Marketing & Engagement

### Marketing Cloud for Nonprofits

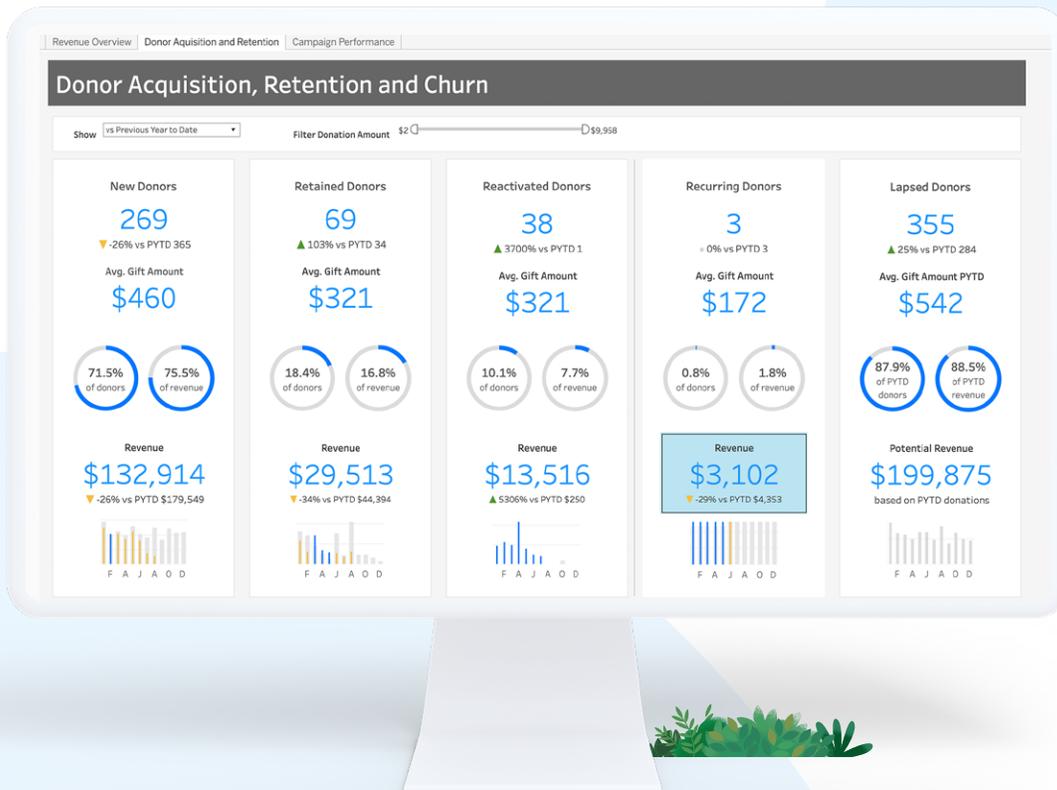
Build constituent-first communications faster, personalized from data in the Nonprofit Cloud. The result is you can better engage and convert known supporters, leveraging beautiful, personalized email campaigns. Grow your reach, but never outgrow your marketing technology.

# 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 personalized 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 optimize your campaigns and use metrics to maximize 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 visualize trends in revenue with analytics



## Nonprofit Cloud Innovation for Analytics and Artificial Intelligence (AI)

### [Tableau Dashboards for Nonprofit Fundraising](#)

The Tableau Dashboards for Nonprofit Fundraising are designed to help you hit the ground running with actionable data on revenue and donors in minutes. In just a few clicks, you'll be able to connect to the Nonprofit Success Pack (NPSP) to Tableau to create beautiful, data-rich dashboards seamlessly.

### [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.

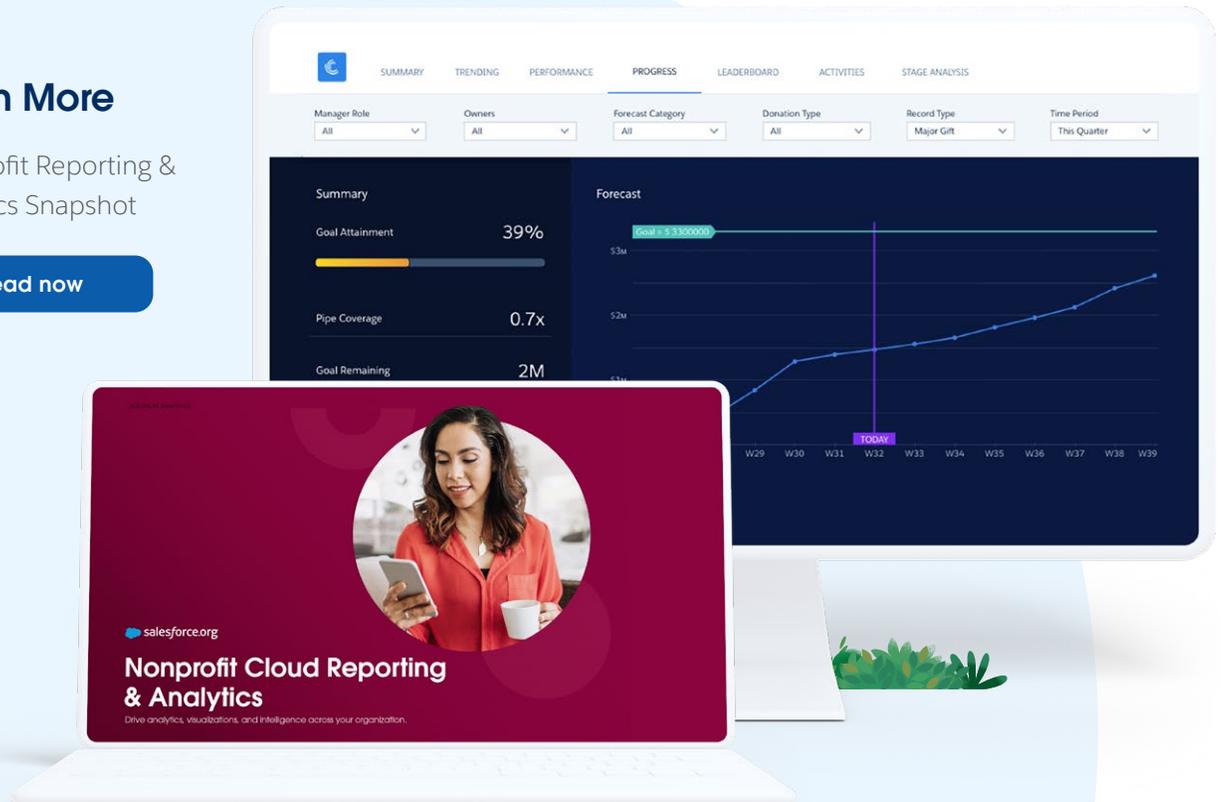
### [Einstein for Nonprofits](#)

Einstein for Nonprofits brings you the power of Artificial Intelligence without the complexity, enabling any nonprofit to deliver smarter, more predictive experiences to their communities. Einstein is built right into the Salesforce platform and automatically discovers relevant insights and predicts future outcomes – all without a data scientist.

## Learn More

Nonprofit Reporting & Analytics Snapshot

[Read now](#)



## Success with Salesforce

Nonprofits partner with Salesforce to be on the cutting edge of technology, however, they also realize 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:

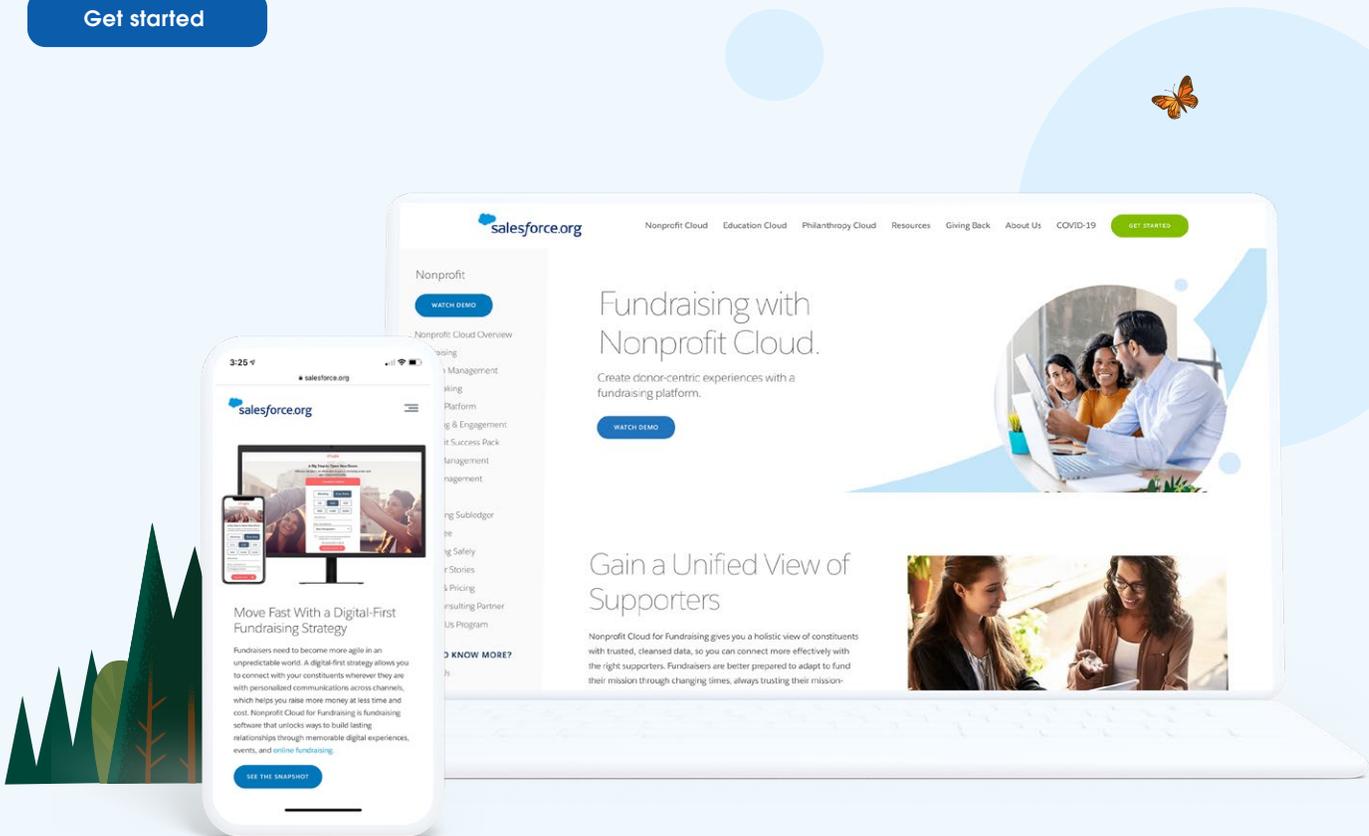
- [Trailblazer Community](#) and [Nonprofit User Groups](#) help connect digitally and in-person with your peers locally
- [Trailhead](#) ensures every staff member is up to speed on Salesforce products with thousands of nonprofit, product, tech and professional training and testing modules
- Every nonprofit 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 organization
- 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



# Get Started Now

Visit our Nonprofit Fundraising Home Page for more reports, webinars, and demos

Get started



Get in touch to learn more about Nonprofit Cloud

Visit us at [www.salesforce.org/contact-us](https://www.salesforce.org/contact-us) or call 1-800-667-6389 to learn more

Salesforce.org is a 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](https://www.salesforce.org) for more.

