salesforce.org

Nonprofit Cloud Reporting & Analytics

Drive analytics, visualizations, and intelligence across your organization.

Introduction

The role of nonprofits has never been more critical in society as demand for services and desire for involvement in mission work increases. But, many times nonprofits don't have the data they need to make effective decisions quickly, and have less and less time to prepare reports and to visualize data.

With the right data visualized clearly, fundraising teams can see where they should focus their efforts, and donors can understand the impact of their gifts – marketers can measure return on campaigns and supporters know their efforts are making a difference – programs teams know where they should spend resources, and clients know how they are progressing.

Having the right tools to visualize your data can make all the difference in how quickly and effectively your day-to-day information becomes insights you can use to further your mission.
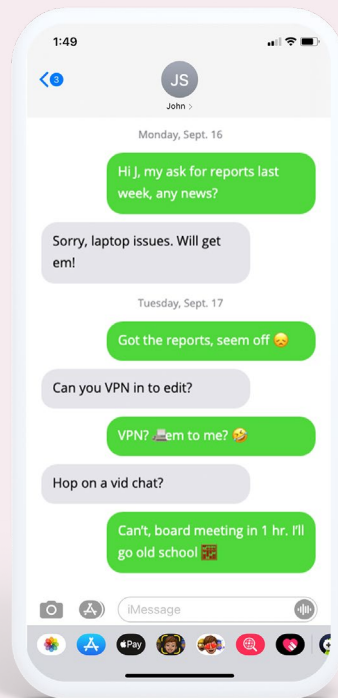
Let's take a closer look

Empower Your People Make Data Work for You

Data should be accessible so that each team and individual can do their job productively and be part of a [Data-driven culture](#) that allows all your staff, partners and even supporters to lead with confidence.

An inaccurate metric degrades trust in a board or supporter meeting, but the right one can get your program or project funded. Lack of data can hold nonprofits back from making important decisions, but the right decisions can be very impactful for an organization's mission.

Go from Lack of Data ⟶ **To Clear Direction**

Democratized, Accessible Data

The data revolution is here

The Nonprofit Success Pack (NPSP) was built for, and with, our community to turn the #1 CRM for businesses into a Constituent Relationship Management system for nonprofits. On top of this foundation for data, nonprofits of all sizes and people of varying technical skills can leverage data to drive decisions.

This guide reviews basic reports and dashboards on NPSP, Intelligence, Business Intelligence (B.I.) with Tableau, and trends and even Artificial Intelligence (A.I.) with Tableau CRM.

Across all you gain:

Instant access to answers and be self-sufficient with prebuilt reports and templates, or build your own!

Cloud collaboration to share, subscribe and comment on. Tableau is even available on desktop too.

Mobile apps to check on key metrics, drive insights, and collaborate on data anywhere.

Data security is no longer a nice to have, it's part of your responsibility to ensure you are stewards of your most valuable and sensitive information. Your constituents trusted data is secure and only viewable by those that should have it.
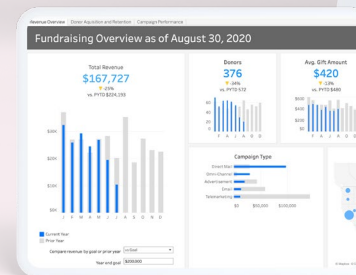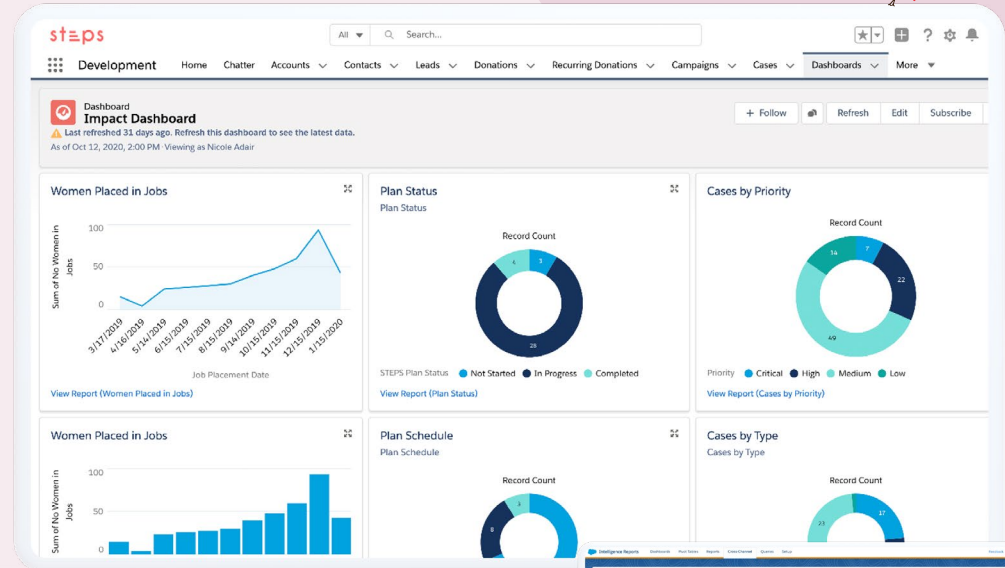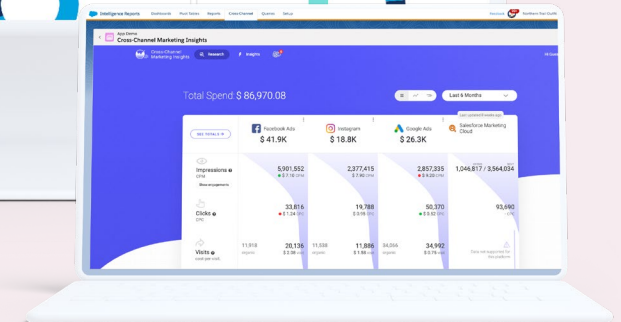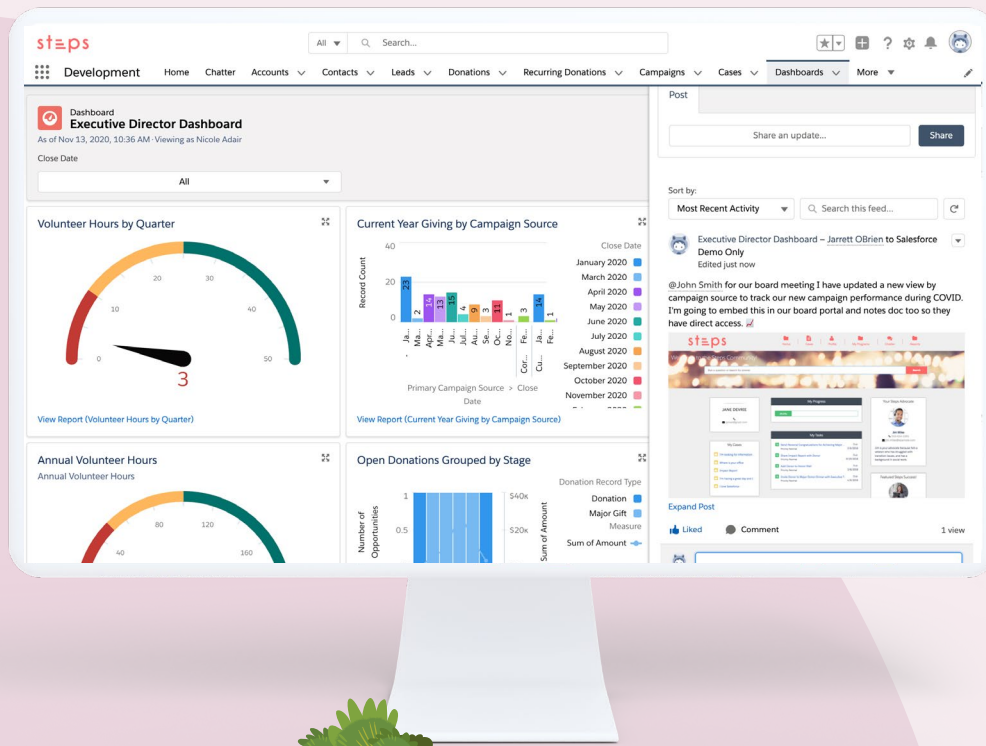
NPSP Reports & Dashboards

Intelligence

Tableau and Tableau CRM

Reports & Dashboards with Nonprofit Success Pack (NPSP)
Save time, show & share the data

With Salesforce, you can build customizable reports and dashboards to analyze your data in any way. But to make it even easier for nonprofits, the Salesforce.org team has built over 70 industry reports and dashboards that are ready to use in the Nonprofit Success Pack (NPSP). Use them as is, or easily and quickly customize them with Report Builder, to meet your specific and every need.

Dashboards take your reports a step further and pull data from dedicated reports so you can view all data in one place and all in one view. These out-of-the-box reports facilitate the monitoring of giving trends, forecast based on open opportunities, and analyze campaign ROI stats.

What are some of the great reports and dashboards that exist in NPSP?

LYBUNT
Understand who has given in the past or may need a nudge to donate this year.

Memberships
View all memberships over the life of your organization by membership join date.

10% Projection Report
Quickly see an ask projection based on a percentage increase.

Reports can even have dynamic math fields to crunch the numbers for you! Staff can also instantly see custom rollups summaries, and quickly create dynamic lists of information filtered and sorted to their liking.

Marketing Cloud Intelligence
All of your marketing data in one place

Marketing Cloud Intelligence unifies every channel you have, from social to web to email, and captures all of the data you need to understand the effectiveness of your marketing, and then shows it to you in beautiful, easy-to-use, interactive dashboards. Now you can know what channels are performing best across all of your efforts, make data-driven decisions, and make a greater impact.

Connect All Of Your Data
Link more than 150 sites and systems to centralize your advertising, marketing, CRM, social and any other data (on any platform!) into one place.
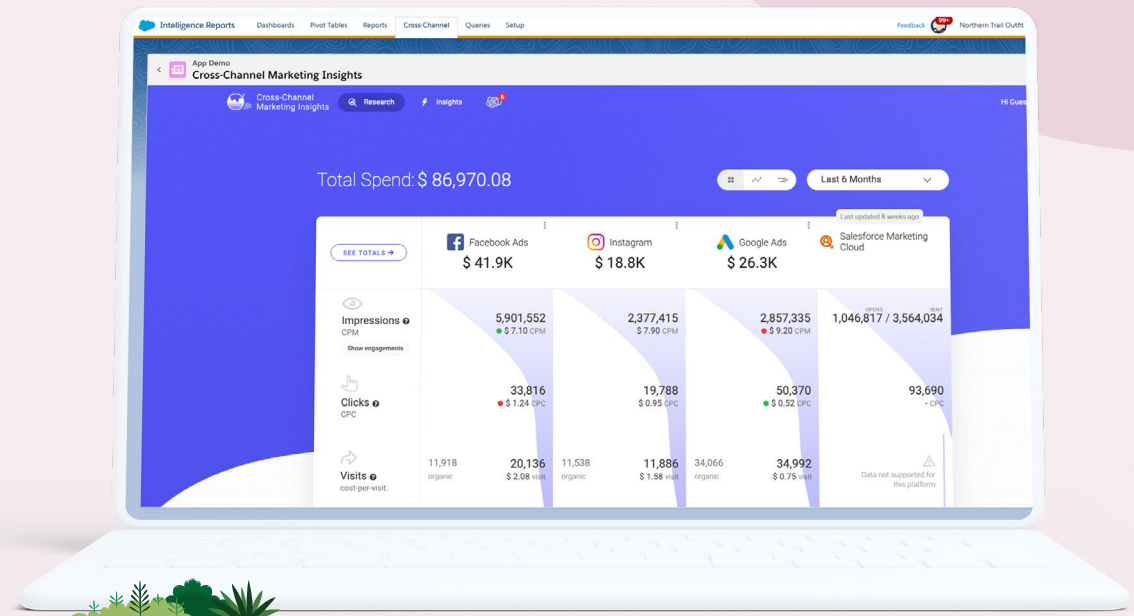
See Instant Campaign Performance
What if you could see all of the data – including donation amount – by every email, every journey and every campaign. It all shows up instantly in an out of the box dashboard in Intelligence.
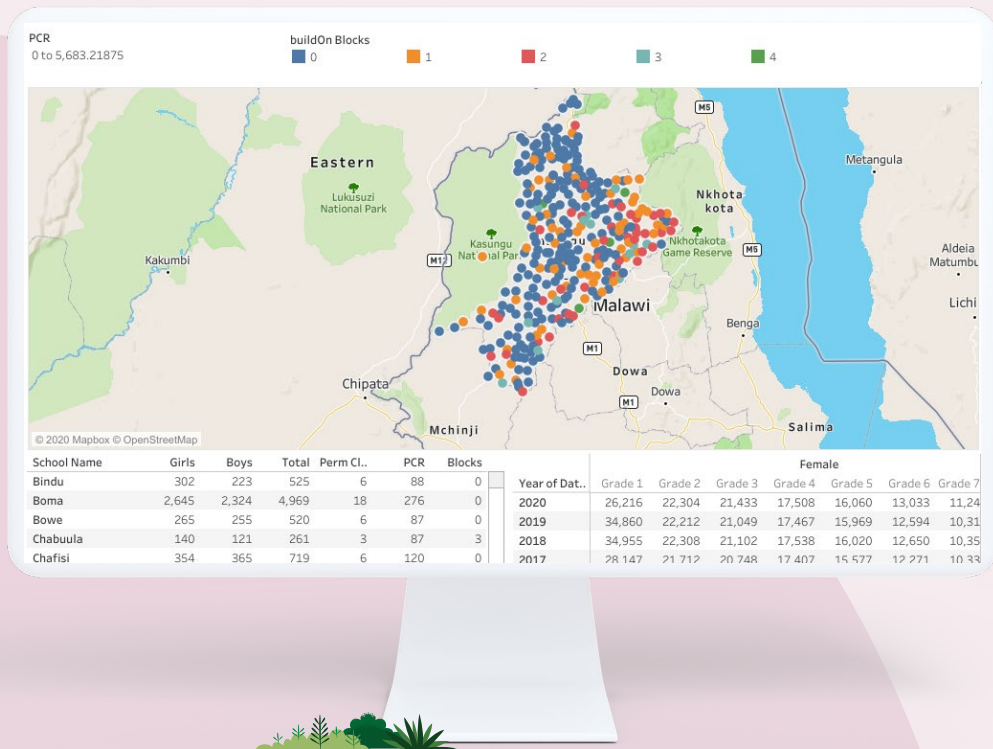
Communicate Internally with Custom, Automated Reports
Whether it's your leadership team, marketing, social, communications – really any team in your organization – you can set-up automated reports.

Be Agile and Innovative
Leverage data and insight to test, learn and innovate across all your marketing.

Tableau
Find easy answers to hard questions

As the market-leading choice for modern business intelligence, the Tableau platform is known for taking any kind of data from almost any system, and turning it into actionable insights with speed and ease. It's as simple as dragging and dropping to prep, visualize, and share your data.

- Unify sources of data and your existing systems on the world's most flexible self-service analytics platform

- Make data easy with intuitive drag-and-drop analysis to quickly spot patterns and reveal those eureka opportunities

- Act collaboratively and securely share dashboards seamlessly across teams with alerts and embed analytics in apps

- Gain data confidence knowing you're using the most trusted, up-to-date data and know which data sources are best
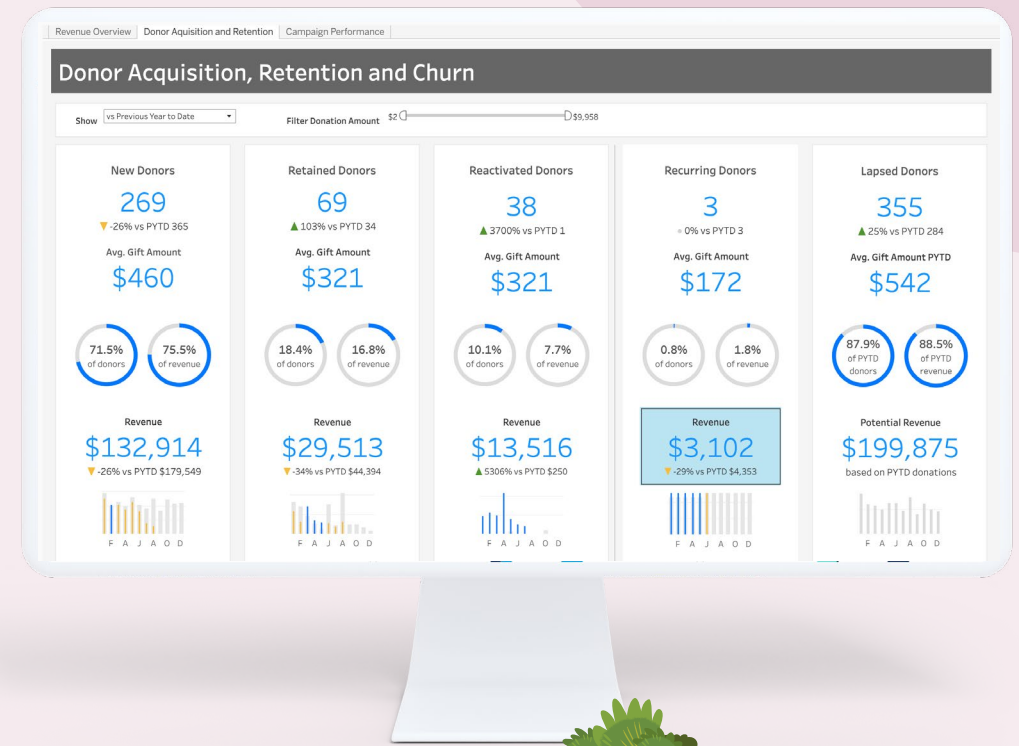
Best of all, it's great for nonprofits, learn more here.

Tableau Accelerators for Nonprofit Fundraising

Unlock the power of fundraising data

The Tableau Accelerators 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 to create beautiful, data-rich dashboards seamlessly:

- Gain insights into revenue performance over time and quickly understand trends for forecasts

- Compare key statistics on statistics around new, retained, reactivated, recurring, and lapsed donors

- Benchmark campaigns that drive the most revenue, and derive campaign trends over time

- Confidently use data to drive decisions to shift strategy and align your team to execute

- Expand usage to other departments and connect with other applications.
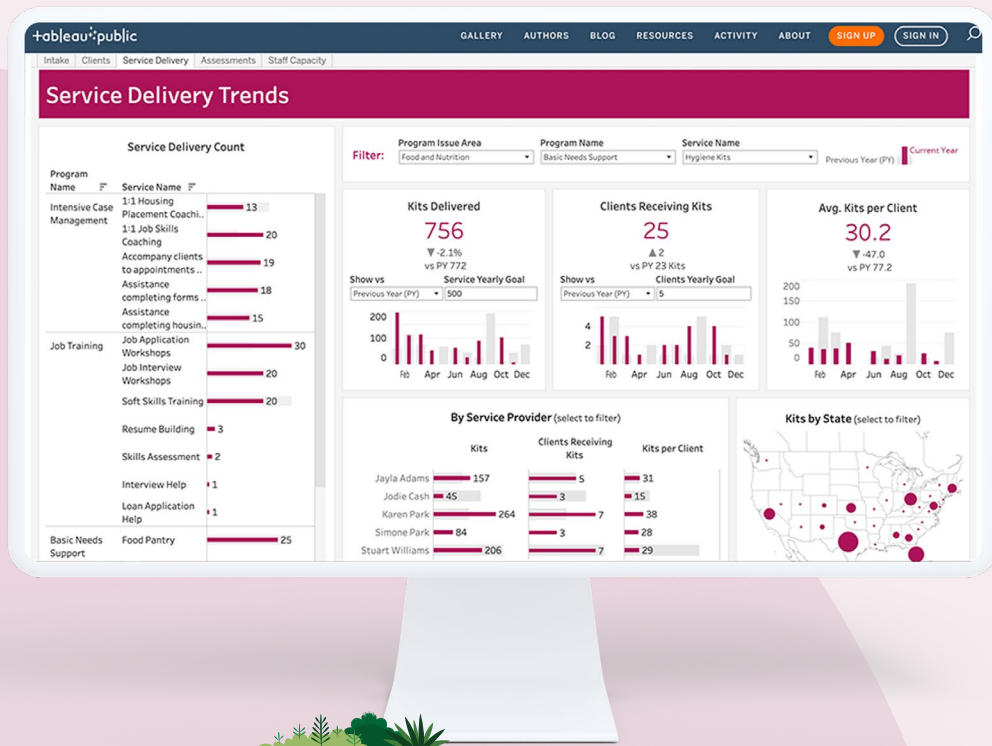
Download all the Tableau Accelerators.

Tableau Accelerators for Nonprofit Program Management
Unlock the power of service delivery data

The Tableau Accelerators for Nonprofit Program Management are designed to help you hit the ground running with actionable data on service delivery, client enrollment and participation, intake, staff capacity and more. In just a few clicks, you'll be able to connect to the Program Management Module and Nonprofit Cloud Case Management to create beautiful, data-rich dashboards seamlessly:

· Gain insights and understand trends around service delivery

· Understand staff capacity and client intake limitations

· View client participation enrollment over time

· Confidently use data to drive decisions
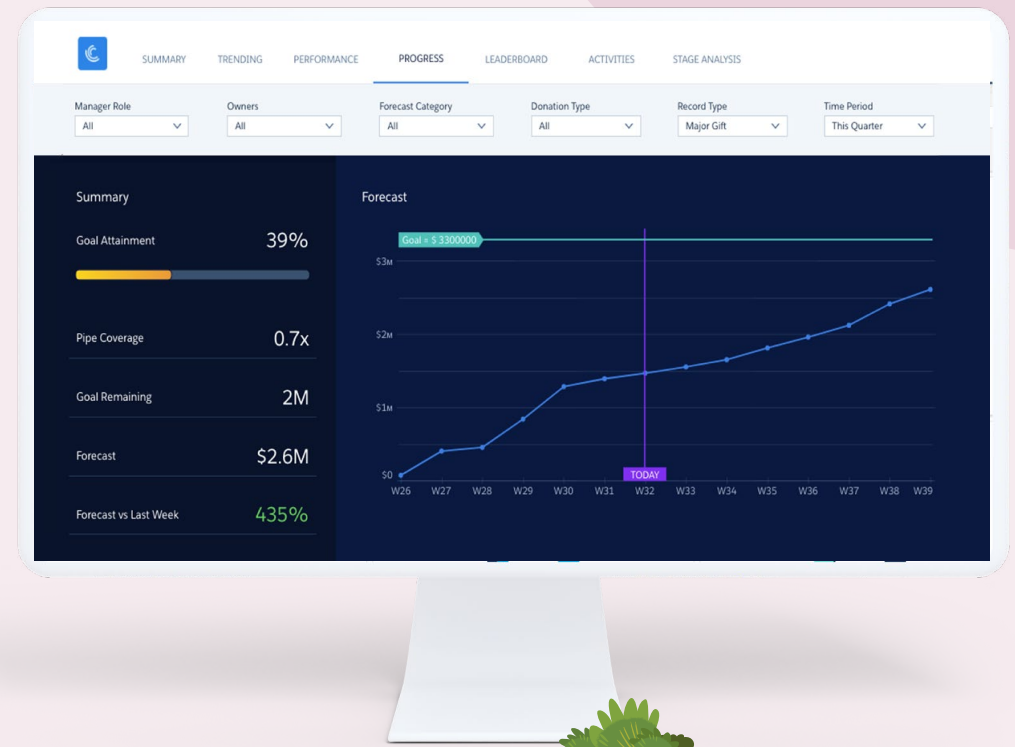
Download all the Tableau Accelerators.

SOLUTION SNAPSHOT

Tableau CRM
(Formerly Einstein Analytics)
Analytics right in Nonprofit Cloud

Tableau CRM helps you spot opportunities, predict outcomes, get recommendations, and more with tight integration to Salesforce's reports, objects, and collaboration features.

- Automate data discovery to find out what happened, why it happened, what will happen, and what to do about it

- Drive performance and achieve all of your goals with precise recommendations and specific guidance

- Take instant action from Nonprofit Cloud to collaborate in Chatter, update records, and share dashboards

- Build with clicks interactive, branded dashboards, or use Einstein to build complex A.I. models

Check out our dashboard templates, the Fundraising Performance and Analytics Dashboard Templates.

Data-Driven Nonprofits
Trailblazers leading the data revolution

Our customer's have transformed the way the
think about the value of, and how they use data.

"Because we have multiple fundraising programs
it's important to know where our revenue is coming
from and where we find the most success in our
efforts. The reporting functionality in the Nonprofit
Success Pack allows us to be really strategic and
targeted in our fundraising strategy."

Melanie Bricker
Director of Development Services,
Furniture Bank

"As we had digitized our mission, we were able to make
decisions and productively shift in 2020, with the time,
space, and focus to learn new technologies. We had
already used Tableau to understand program impact,
and were able to quickly deploy Tableau Starter
Dashboards for Fundraising to now be able unlock our
donor data, forecast more effectively, and visualize
revenue performance."

Eric Dayton
buildOn

Deciding on Technology
Insights for every organization and occasion

So the question you might be asking yourself is, which do I use? There are a few things to take into consideration when selecting the right tool for the job, and many customers use more than one (like buildOn). The benefit is you have choices, and they're all great.

If you haven't used reports or dashboards, start there to learn what kind of data you need. However, many customers hit a wall and want more power. If you're focused on end users and CRM integration or A.I., Tableau CRM is perfect. If you're looking for more of a B.I. tool across departments and systems, Tableau is better to start with. See the next page for details.

Tools and Solutions

Capability	Reports	Dashboards	Tableau CRM	Tableau
Accessibility				
Cloud Based	Cloud	Cloud	Cloud	Cloud or On-Premise
Mobile App	✓	✓	✓	✓
Data Sources & Connection				
Reporting on CRM Data	✓	✓	✓	✓
Reporting on Data Across Systems			✓	✓
Data & System Connections	CRM	CRM	22+ and growing	70+ Connectors
Data Refresh	Instant	Instant	Last data set refresh	Last extract
Reporting & Analytics				
Static Visualization of Data	✓	✓	✓	✓
Interactive Visualization & Trending			✓	✓
Templates and Starters	NPSP 60+	NPSP 60+	✓	✓
Fundraising Templates	✓	✓	✓	✓
Programs Templates	✓			
CRM Integration & Artificial Intelligence (A.I.)				
Embedded in NPSP & Salesforce Widgets	✓	✓	✓	✓
CRM Clicks & Action Framework	Native	Native	Native	Not Native
Embed in Public Facing Properties				✓
Embed in Experience Cloud	✓	✓	✓	
Embed in Quip	✓	✓	✓	
A.I. Predictions			✓	

Have questions? Contact our Account Team

Get more info on Marketing Cloud Intelligence here

salesforce.org

Learn more about Salesforce Nonprofit Cloud

Learn more