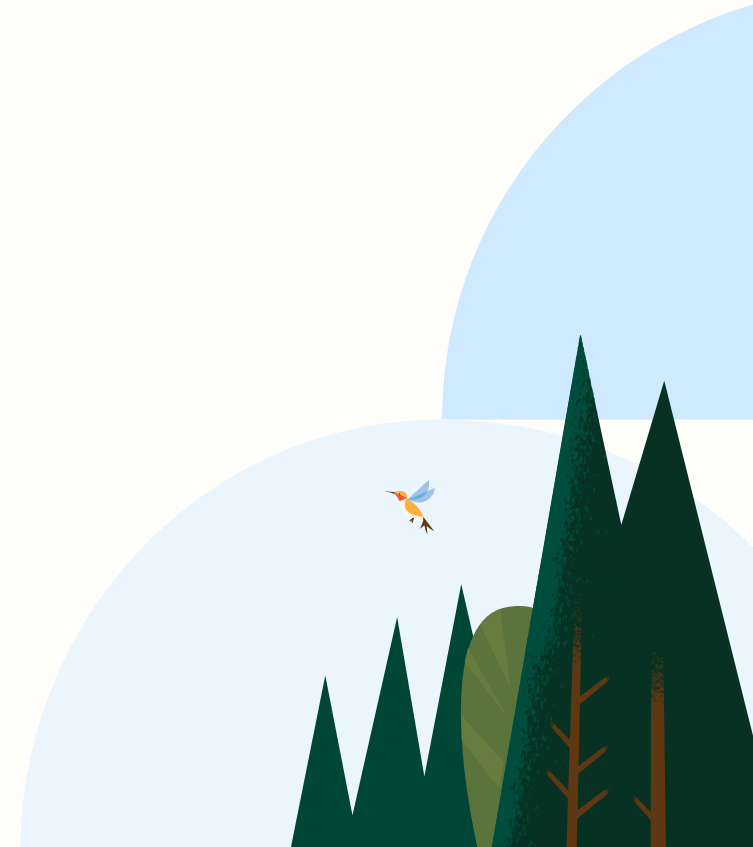salesforce.org

7 Ways to Maximize Your Impact with Salesforce

From service delivery to supporter engagement, discover how to overcome some of the biggest roadblocks to nonprofit success

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Introduction

Your ability to fulfil your mission is impacted by how well your nonprofit can scale up economically and efficiently, manage service delivery, amplify and demonstrate impact, and communicate effectively with supporters.

Fortunately, customer relationship management technology can help you address these challenges and more. In this guide, we'll look at seven of the biggest roadblocks to nonprofit success, give you some ideas for how to use digital solutions to overcome them, and introduce you to nonprofit Trailblazers that have achieved their goals with the help of Salesforce's CRM.

1 Make the Best Use of Your Database

Improving efficiency with a unified view

Challenge

From supporter insights to service delivery details, your nonprofit manages a lot of data. But data often comes from multiple sources and is held in multiple systems, which makes it difficult to track, keep accurate, and use effectively. This can cause issues from duplicated work to siloed data and negatively impact your ability to make informed decisions and deliver on your mission.

Solution

Uniting all your data in one database gives you a comprehensive overview and lets you track information to fulfil your mission with ease. Using tools that automate data entry processes will also improve accuracy and save you valuable time.

Salesforce's customizable database and Salesforce Nonprofit Cloud Case Management put the information you need to achieve your mission at your fingertips.
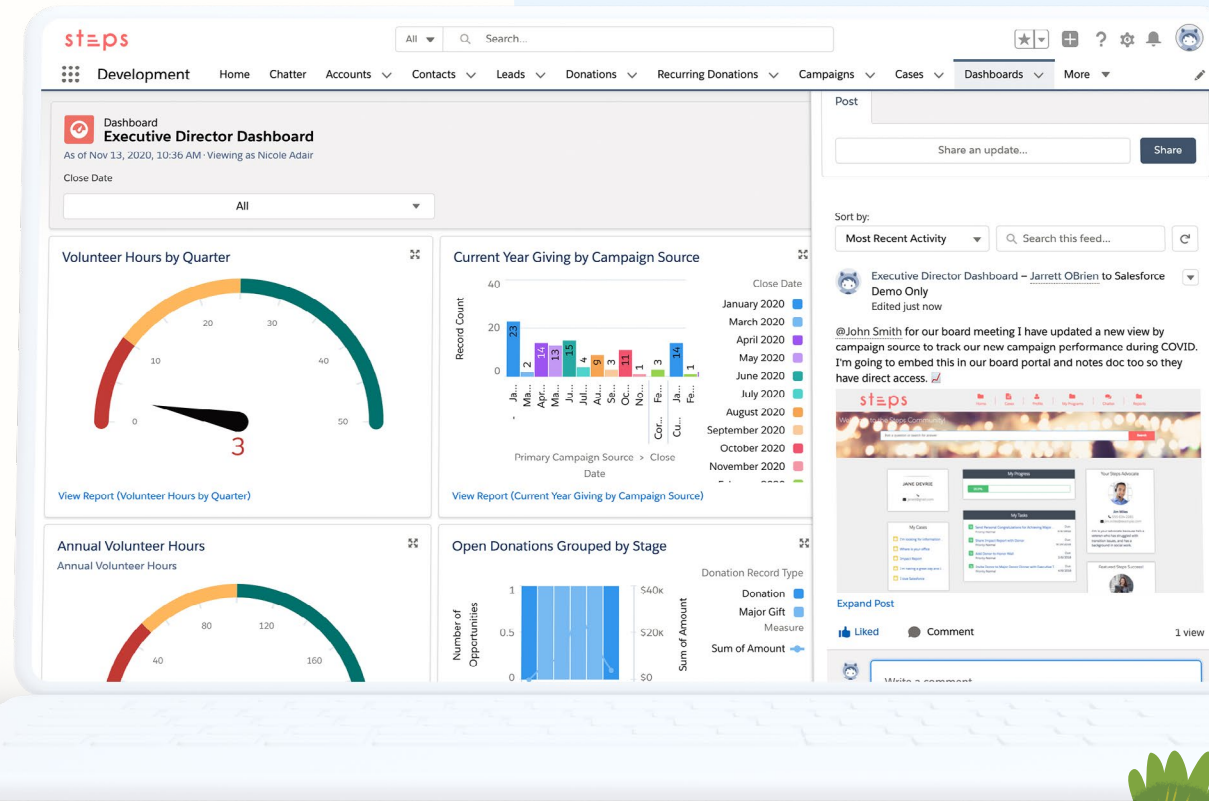
Customer Story

Thomas Pocklington Trust

Supporting blind and partially sighted people, Thomas Pocklington Trust sought a digital data storage solution to replace their paper-based approach. Salesforce Nonprofit Cloud Case Management's accessibility features and flexibility made it the perfect fit, providing managers – including those who are partially sighted – with real-time access to data and freeing up more time to support service users.

"We have been looking for a solution like this; nothing else comes close."

TPT

**Russell Cable, Thomas Pocklington Trust
Data Systems Manager**

## 2 Expand Your Reach

Using tech to scale up your operations

Challenge

Nonprofits ready to expand their reach and impact often find technology and resourcing challenges blocking their path to success. Incompatible or ageing systems struggle to keep up with the addition of new users, locations, and changing processes, adding to the workload for nonprofit staff and volunteers.

Solution

Implementing a cloud-based, scalable platform that can grow with your nonprofit allows you to accelerate your digital transformation and scale up with confidence. A cloud-based platform makes collaboration possible from anywhere and data accessible in real-time. This increases efficiency and reduces the strain on your staff and resources.

Salesforce's Nonprofit Success Pack (NPSP) makes growing your organization easier than you imagine.
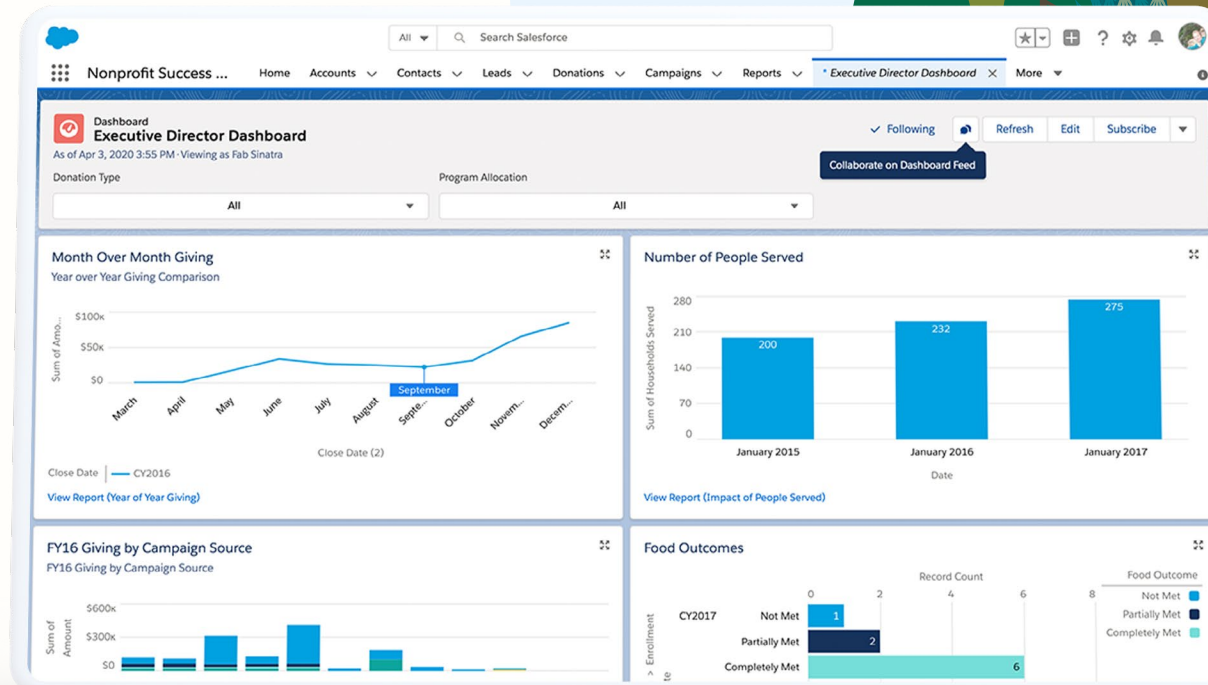
Customer Story
Self Help Africa

Working in nine African countries to tackle poverty and improve the lives of local communities, Self Help Africa needed to bring all activity into a single view to manage and measure their programs effectively. With Salesforce's Nonprofit Success Pack (NPSP), information including budgets, progress reports, income, and beneficiary data is readily available. Having their data more accessible allows Self Help Africa to demonstrate the impact of their programs to donors, which is key to driving engagement and success.

Self Help Africa's revenue has grown from €7 million to €20 million per annum with Salesforce's Nonprofit Success Pack.

Self Help Africa

3 Go Mobile-First to Improve Service Delivery and Case Management

Minimizing the burden on staff

Challenge

Many nonprofits work on paper or use outdated database systems for case management. Not only does this create waste and inefficiencies for overworked teams, it also increases the risk of inaccuracy, which makes regulatory compliance and programme and service delivery much more difficult. With the rest of the world now thinking digital and mobile first, it can be a barrier for beneficiaries and supporters alike, restricting your progress.

Solution

A mobile-first platform brings your programs into the digital era. Data can be collected on any device and sent directly where it needs to be. Add to this a cloud-based management system, and your programs and caseloads can be effectively managed from anywhere. Plus, track everything from services to referrals, case plans, and assessments in real-time. with confidence. A cloud-based platform makes collaboration possible from anywhere and data accessible in real-time. This increases efficiency and reduces the strain on your staff and resources.

> Salesforce's Nonprofit Cloud Case Management provides your nonprofit with the technological advancements you need to succeed.
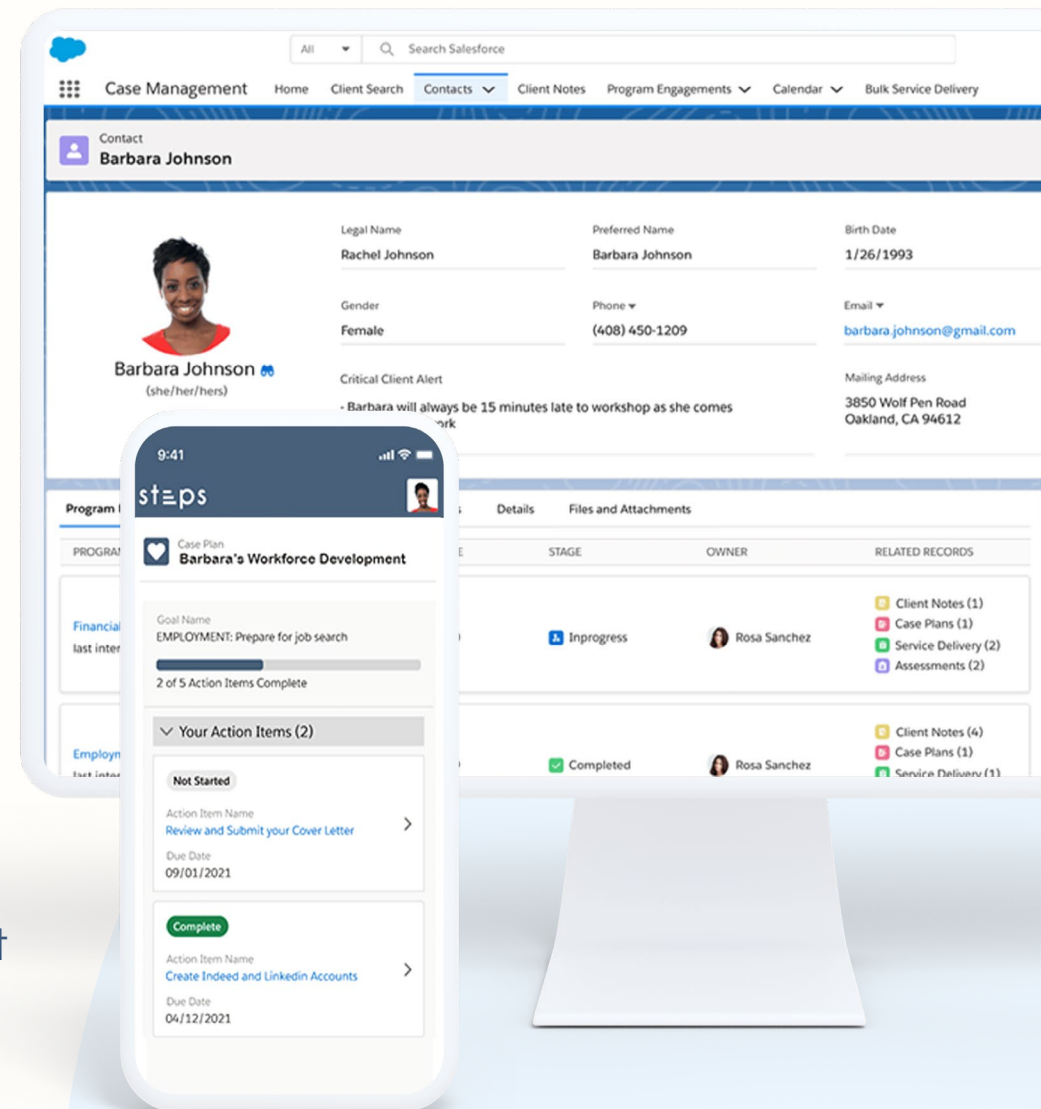
Customer Story

Camfed

Camfed, a nonprofit that supports the education of girls in sub-Saharan Africa, needs to have visibility of every student throughout their education to ensure those who are the most vulnerable get the help they need. The nonprofit uses the Salesforce mobile app in the field to collect data that identifies girls at risk of dropping out, enabling immediate action.

Camfed collects data at 5,270 partner government schools through one mobile app with Salesforce.

"Salesforce provides the data we need to respond with urgency and deliver girls' education at scale."

Anke Adams, Head of Advocacy and Strategic Communications, Camfed

4 Align Your Reporting Processes

## Implementing an organization-wide approach

Challenge

Many nonprofits have several branches or regional offices that each can have a slightly different way of inputting and managing data. This promotes inconsistencies, inaccuracies, duplicate entries, and interoffice communication problems, making it almost impossible to keep track of and report your impact.

Solution

Implement and share a common data model across your organization to ensure that everyone reports back to your central office or HQ in the same way, and that data standards are upheld. Adding a cloud-based digital experience platform also allows staff to easily share files and collaborate with others, while maintaining the level of data privacy you require.

> Salesforce's Tableau CRM and Experience Cloud standardize data usage so your data can do more for your nonprofit.
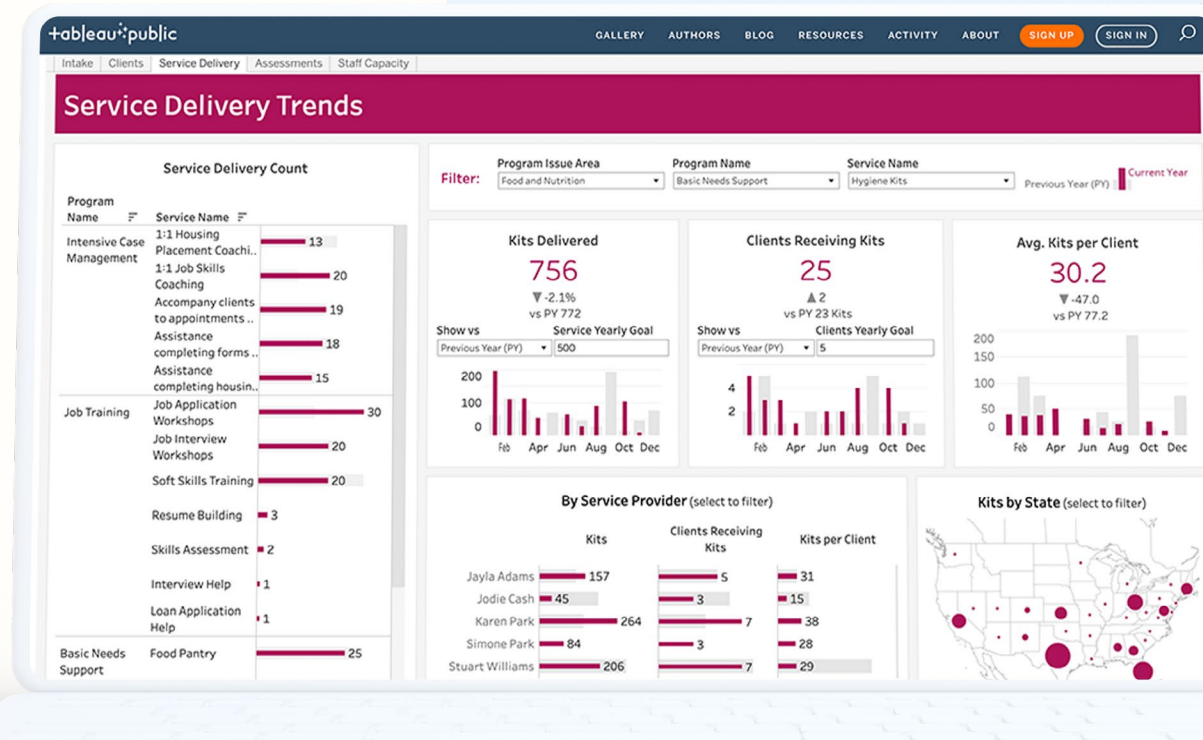
Customer Story

The Fire Fighters Charity

Providing lifelong support to all Fire and Rescue Service personnel, The Fire Fighters Charity relies on technology to help them engage and communicate with both supporters and beneficiaries. They started by partnering with Salesforce to replace their disparate systems with a single view, then implemented additional Salesforce tools to increase their understanding of their beneficiaries. Now, they can offer the right support and measure the impact of their work.

⑤ Manage Partnerships More Effectively

Working smarter together

Challenge

Relationships with external partners are extremely valuable but often pose operational challenges. External partners need access to necessary resources and a forum for communicating and reporting back. At the same time, you must control the information they're able to view.

Solution

Having a digital platform with a portal means you can create a tailored experience for partners that deepens their engagement with your work, allows them to collaborate more effectively with you, and lets them view progress data and access important resources. Plus, a customizable portal gives you greater control over what they can access and do, while protecting any sensitive data.

> Salesforce's Experience Cloud makes working with external partners more effective and efficient.
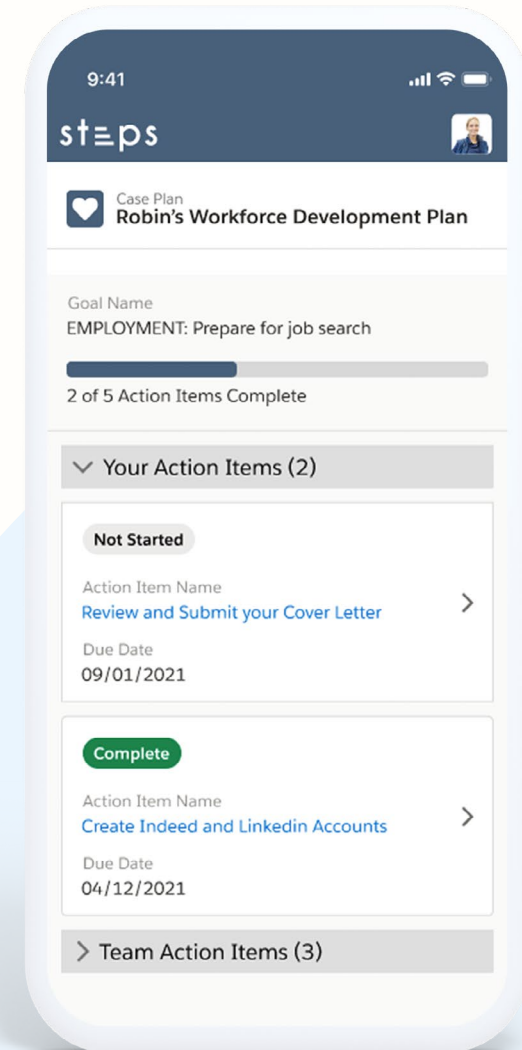
Customer Story

Gavi

Working with partners worldwide to deliver immunisation programs meant Gavi needed a way to simplify interactions and processes and provide real-time insight into grant applications and renewals. The nonprofit built a portal through which countries can apply for new vaccine support and report on programme performance. They're also using Salesforce Platform and Experience Cloud to analyze successes, make data-driven decisions, and provide countries with real-time access to their grant status.

Salesforce Platform and Experience Cloud helps Gavi keep partners in 73 countries up to date.

6 Enhance Beneficiary and Supporter Experiences

Deepening engagement with marketing automation

Challenge

Engaging supporter and beneficiary audiences is crucial for success, but with so much competition online for their time and attention, just getting noticed can be a challenge. Then, you must keep new audiences engaged once you've got their attention.

Solution

Salesforce's Engagement Plans, our marketing automation tool, can help you do both, creating unique supporter and beneficiary journeys tailored to their interests and past activity. From emails to social media, run all engagement activity automatically from one platform, messaging and branding aligned and give marketing staff full visibility.

> Salesforce's Engagement Plans increases supporter and beneficiary engagement.

Customer Story

National Citizen Service

National Citizen Service, a youth enterprise nonprofit, has provided programs for more than 600,000 young people since 2009, contributing to 14.5 million hours of social action. Salesforce technology is helping NCS accelerate its mission and transform interactions with young people and their families through personalised journeys and communications.

The National Citizen Service increased sign-ups by 25% in three years using Salesforce's Engagement Plans.

"The sign-up process can now be completed online in just 25 minutes – in the past it could have taken up to three weeks."

Ryan Lang,
Salesforce Product Owner at NCS Trust

7 Strengthen Analytics & Reporting

Improving impact reporting processes

Challenge

Your nonprofit's ability to track, measure, and prove impact to supporters is mission-critical, but older processes or systems can make it difficult to access necessary data for efficient and useful reporting. Analytic limitations often force organizations to settle for measuring program outputs instead of outcomes, which doesn't show your real impact.

Solution

Integrate all your data in a CRM system that includes reporting capabilities. Salesforce's Tableau CRM allows anyone in the team to quickly and easily pull together the reports needed to see results and demonstrate impact. Tableau includes advanced tools to draw in and analyze data outside of your CRM, such as from third-party or public data sources.

Put your data to better use with Salesforce's Tableau CRM.
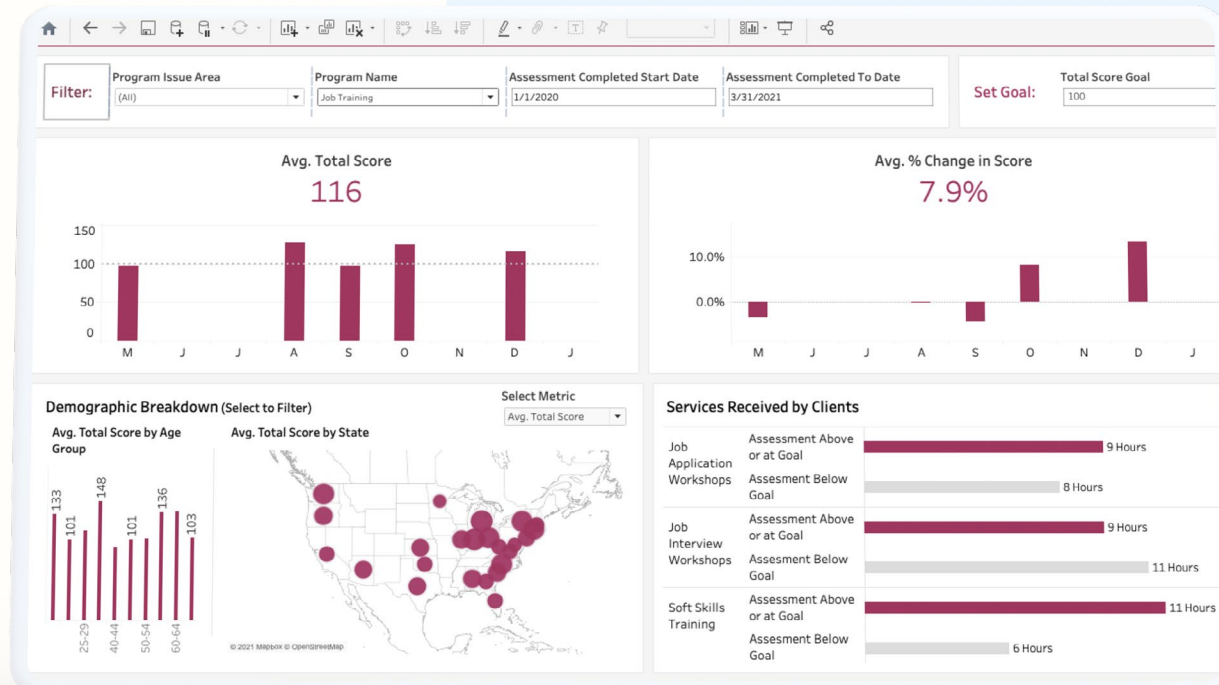
Customer Story

Women Win

Women Win, which helps women and girls exercise their rights through sport, uses Salesforce solutions to track and evaluate impact. Since moving to Salesforce, the nonprofit has transitioned from financial and narrative reports to interactive dashboards and detailed data analysis, allowing them to establish and share the collective impact they and their partners are having. As a result, they're seeing increased success in addressing important issues, including girls' access to rights, health, and education.

WOMENWIN.ORG