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SALESFORCE EXPERTS

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How to **liberate** **your organization** from manual, repetitive tasks

An e-Guide for not for profit organisations wanting to make the most of Salesforce.com

As a not for profit organisation every penny you receive is important. How you spend it is an important decision and one that nowadays comes under close scrutiny. As we all know, if you are wasting time, you are wasting money. Do your staff spend too much time on manual, repetitive tasks which could be automated therefore freeing them up to do more valuable work?

In this guide, we examine seven typical operational challenges facing not for profit organisations (NFPs) and discuss how the Salesforce.com technology can be used to provide solutions that reclaim many hours of lost time.

Challenge 1 - Dependency on spreadsheets



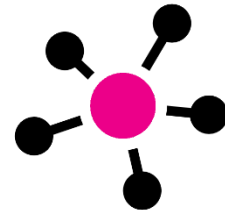
A spreadsheet is not a database in the same way that a shoebox full of receipts is not a bookkeeping system. We all know it but understanding how to progress to the next stage can often be confusing. So you struggle on, aware that there is a better way, but not really sure how to take the next step.

A typical NFP will have an ever growing number of spreadsheets that are used to record lists of organisations and people you interact with. You may also have spreadsheets to keep track of funding opportunities, applications for grants or places on your Programme.

Consequently, it's a challenge to locate the latest piece of information, segment lists based on criteria or simply organise your information in a useful way.

Solution – Salesforce will accommodate all this information with ease, interlink records and present segmented data back to you in logical chunks that support your day to day activities. Furthermore, a centralised database means you have a single source of the truth rather than an extended family of spreadsheets. This means you can spend your time using your data productively rather than spending hours corralling it into a usable state.

Challenge 2 – A holistic view of a person or organisation



With information held across multiple spreadsheets and team members' mailboxes, it's impossible to view all the interactions and history relating to a single person or organisation without trawling through lots of dispersed sources.

Solution – With Salesforce acting as the central hub of information in your organisation, you can easily view the entire history about a person or organization on a single screen. Since records are inter-connected, you can view more information by simply clicking through to underlying detail.

Challenge 3 – Reporting and metrics

As the volume of data streaming into your organisation increases, organising and making sense of it becomes harder and more time consuming. Do team members dread that email that asks them for a specific report knowing it will take hours to collate and double check all the pieces of information?



Solution – Pre-set templates can pull information together into Reports and Dashboards at the click of a button giving you instant insights and tells you the story behind your organization. Furthermore, these Reports can be automatically sent to those who need the information on a scheduled basis.

Challenge 4 - Mass communication

Sending mass communications is often a major headache for NFPs. Assembling a segmented list of recipients, creating a professional looking HTML email template and sending emails in bulk is often a highly manual process. Tracking opens, click throughs and opt outs or simply who has been sent specific email communications is usually a distant dream.



Some NFPs use Outlook or Gmail for sending mass communications. Both of these platforms are more suited to sending individual emails rather than in bulk. You may be using an email marketing tool which will solve some of the issues described above, but if it's not integrated into the database, you may be finding it a struggle to manage data in two systems.

Solution – The first step is to maintain a central repository for all your contacts, ensuring that their email preferences are recorded. Categorising them by type, location, interest etc will help when generating segmented lists for specific marketing campaigns so they are sent relevant communications. After that, having an integrated email marketing system that facilitates the transfer of contact data and campaign performance data such as opens, click throughs and opt outs will streamline your marketing processes, avoid data integrity problems and save you time.

Challenge 5 - Capturing data

Do you receive applications for a place on your Programme or for grant funding? Perhaps you carry out surveys to gather feedback from Participants and Partners. Maybe you capture periodic progress updates via MS Word documents? Does the information being collected arrive by email for manual processing and recording in spreadsheets? Worse still, does this information arrive in paper format? If so, you will understand how incredibly time consuming and error prone this can be.



Even if you are using a system such as Survey Monkey, this is only really replacing the manual data entry element. The information being recorded is still disconnected from the rest of your data.

Solution – The process of collecting data can be radically streamlined by using online forms to capture information which is saved directly into the database. The information can be automatically linked to the relevant records that will not only enrich the information you have on an individual but improve your visibility and ability to produce accurate reports at the press of a button. Streamlining this part of your operational process will save you and your team many hours of unnecessary administration.

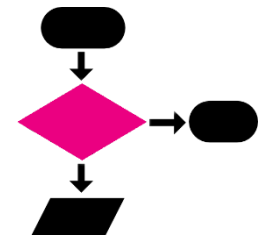
Challenge 6 - Creating standard documents



Data input is only one side of the coin. You no doubt have many examples where documents need to be created (offer letters, contracts or even a record of what was submitted via an online form). Once again, this is a time consuming task that just gets in the way of more important activities.

Solution – Combining the data stored in Salesforce with the power of a 3rd party application such as Conga Composer will enable these documents to be generated on demand. Take this one step further and you could automatically generate and distribute standard documents in bulk. Either way, taking advantage of this technology is a huge time saver.

Challenge 7 – Disconnected manual processes



We have touched on many day to day activities which are manual, disjointed and time consuming involving the use of spreadsheets, back and forth emailing, data entry and manually compiling reports. To automate any of these individual pieces would be an improvement but if they remain separated, your team still needs to link them together and consequently will not be working in an optimized way. For example if applicants apply online but a team member then needs to send an acknowledgment, this can sit as a “to-do” in somebody’s inbox.

Similarly if feedback needs to be returned by a certain date, who chases the recipient if they do not respond? How would they know which recipients have responded or not?

Solution – If you can define a routine sequence of tasks that need to be carried out as part of your organisation’s day to day operation, Salesforce can tie them together in an automated series of actions easing the admin burden on your team and giving them time back to concentrate on more important activities.

Conclusion

Many of these challenges and their associated solutions can bring meaningful benefits to your organisation, but combining them together can create an incredibly powerful system that can see your entire operation moving across to a Cloud database platform that stores your data in a secure, structured and interconnected way and automates many aspects of your day to day operation.

Rephrase chose Salesforce to power our liberating solution because of its flexibility and our in depth knowledge of its structure and capabilities.

The possibilities with Salesforce for NFPs are endless and finding a partner that fits with your organization and understands the challenges you face is vital.

Take a look at some of our case studies where we explain how organisations including Ark Schools and Frontline have transformed the way they work and have made considerable efficiency improvements as a result.