How to Select Salesforce® Consulting Partner for a NONPROFIT ORGANIZATION and ASSOCIATION?

APLUSIFY

Your Ultimate Guide

Many nonprofits and associations are using Salesforce® **Nonprofit Success Pack (NPSP)** for managing their fundraising, donations, constituent, members, volunteers and other aspects of running such an organization.

Have you ever come across a dilemma when hiring a Salesforce® consultant? How do you know which Salesforce® consultant is best for your nonprofit or association?

If you are one such Salesforce® user. Don't freak out. This whitepaper brings to you the detailed list of questions and solutions that can be your personal guide in choosing the right Salesforce® consulting partner.

Why Choose Salesforce®?

We all know that Salesforce® is undoubtedly the unsurpassed CRM tool. But still, if you have questions like; will Salesforce® solve all my challenges of managing a nonprofit or an association? The answer to the above question is YES! But there is a condition.

Unless you know how to maximize and optimize your Salesforce® usage, you will not be able to get the best returns from it. In the absence of complete knowledge, you might start feeling that you have a CRM platform that does not fit your organizational requirements.

An expert Salesforce® consultant can help you with all the support your organization needs. As a result, you get the required Return on Investment (ROI) and Return on Relationship (ROR). A consultant with experience of working with nonprofit, charity and associations will help you with a good plan. They will also support your team every step of the way as you grow in your nonprofit operations.

Yet, a word of caution here. There is a sea of Salesforce® consulting firms, so finding the right one can be an overwhelming task.

In this whitepaper, we are sharing answers to some commonly asked questions to help you chose the right Salesforce® consulting partner. A Salesforce® consulting partner who understands your vision and here helps you achieve your goals faster.

Let us find out how

FAQ#1

What role a Salesforce® consultant will play in my nonprofit organization or association?

When selecting Salesforce® consultant for your nonprofit organization you need to know what exactly you want. Your Salesforce® consulting partner can influence your organization in many ways. Hence, it is important to understand what role they will play to help you meet your business goals. For better understanding, list your expectations before starting the evaluation and hiring process.

An unclear vision will create more confusion for your internal team. And we are sure you will not want them to lose focus, time and money.

FAQ#2

Should we involve our internal team in the hiring process?

Yes, it is important to involve your team, when hiring a Salesforce®, consultant. **This will help you get clarity on the following aspects:**

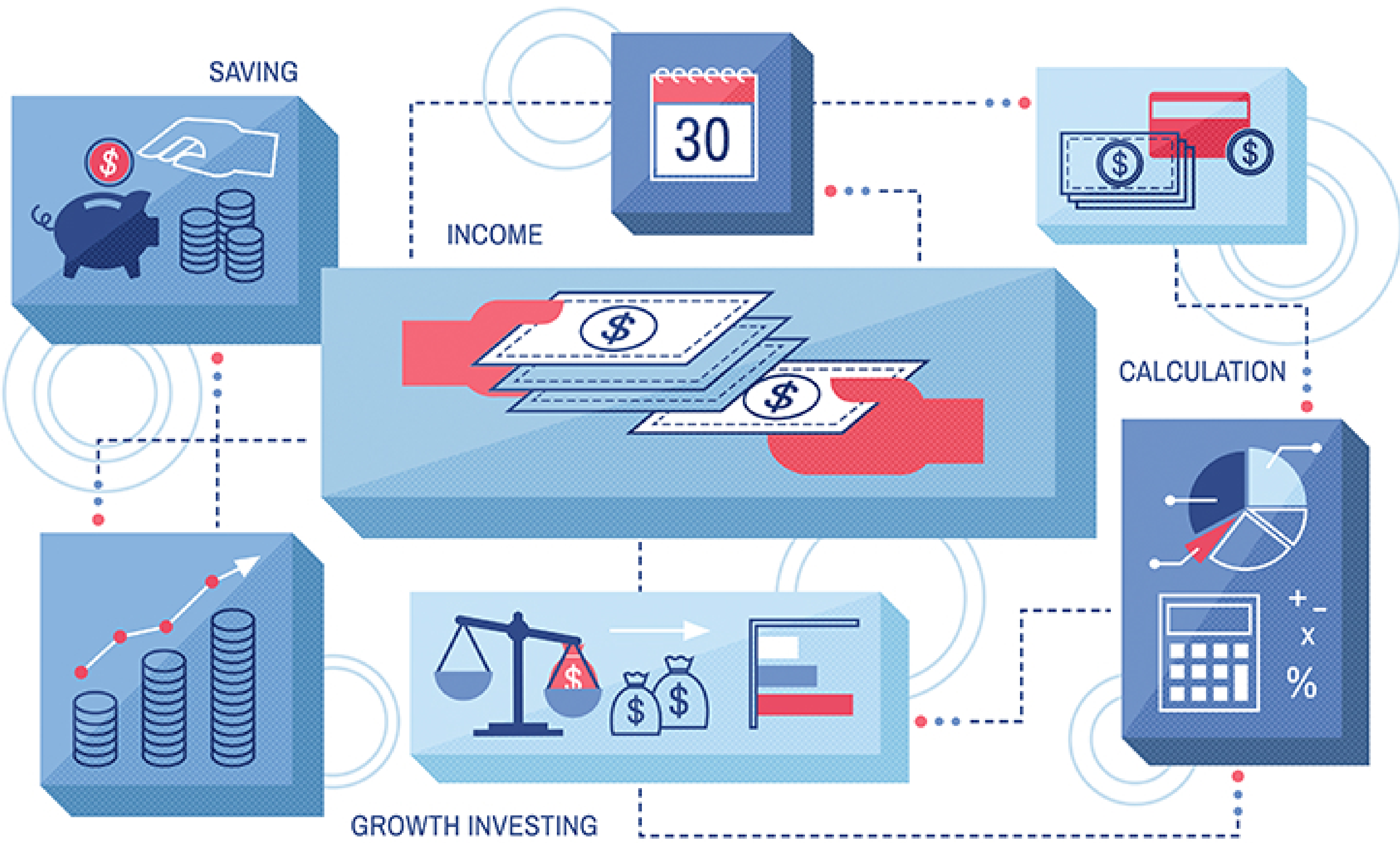
- Do a detailed analysis of how effective is your current CRM strategy.
- Ask for the user feedback on the current setup.
- Get rid of unnecessary tools.
- What are your goals for Salesforce®, implementation?
- What operations do you plan to manage through Salesforce®?

There are so many ways by which Salesforce® as a CRM tool and consultants together can influence your business. You will have to be as specific as possible about your expectations. This way, you will save time in connecting only with the consultants who have experience in delivering similar results.

FAQ#3

How to do budgeting for hiring a Salesforce® consultant for your nonprofit organization?

Plan a realistic budget for your Salesforce® consultation. Get a reality check of how much you can spend on your Salesforce® services for your nonprofit associations before moving ahead. An expert Salesforce® consultant can put your organization on the path to success. But their services do not come for free. So put together a sensible budget that covers all the expenses you will have.



Let us understand this better with the example below

Consultation cost - A Salesforce® consultation cost will vary on the type and scale of your project. Still, it is important that you know the ballpark amount that your top selected consultants will charge.

This price will vary depending on the number of user licenses, the Salesforce® edition, and any additional service you may need.

Integration costs - Based on your business requirement, you may have to integrate third-party applications from AppExchange. Also, account for this additional cost. Decide which apps and features are most needed in your CRM as per your business needs.

It will help you narrow down the list of consultants if you know how much you will be able to spend on your Salesforce® project. There is nothing to worry if the list of shortlisted companies is small. It makes your search more focused and efficient.

FAQ#4

Can we also work with a Salesforce® consultant with no experience of nonprofits?

My suggestion will be to work only with a Salesforce® consultant with nonprofit & association experience.

Now that you have plotted out a Salesforce® strategy for your organization and put together a budget aside. It is time to launch your search for the right Salesforce® consultant for your nonprofit firm.

Most of the consultants will share their portfolio, success stories and customers list on their websites. You can assess the type of work they have done in the past and get an idea of the outcomes.

It is obvious that any consultant you consider should know Salesforce® in and out. If you are migrating data or integrating multiple platforms, find out if they have experience and expertise to help you with this.

You may come across firms who offer broad technology consulting services that can cater to a wide variety of needs. Dig deeper by checking out the projects they are experts of. Check out their online case studies or ask the firm to share their portfolio.

Also, find out what kind of organizations have they worked with. Compare yourself to their past clients to get an idea of the scale and size they have experience working with.

Hiring a Salesforce® consultant is comparable to hiring a new employee in your team. You should ask all the applicable questions. Make sure the volunteer and nonprofit programs they have worked on in the past have some similarity to yours. Just having knowledge of Salesforce® is not enough. They need to know how they can best use Salesforce® to meet your specific project goals of your nonprofit organization and association.

FAQ#5

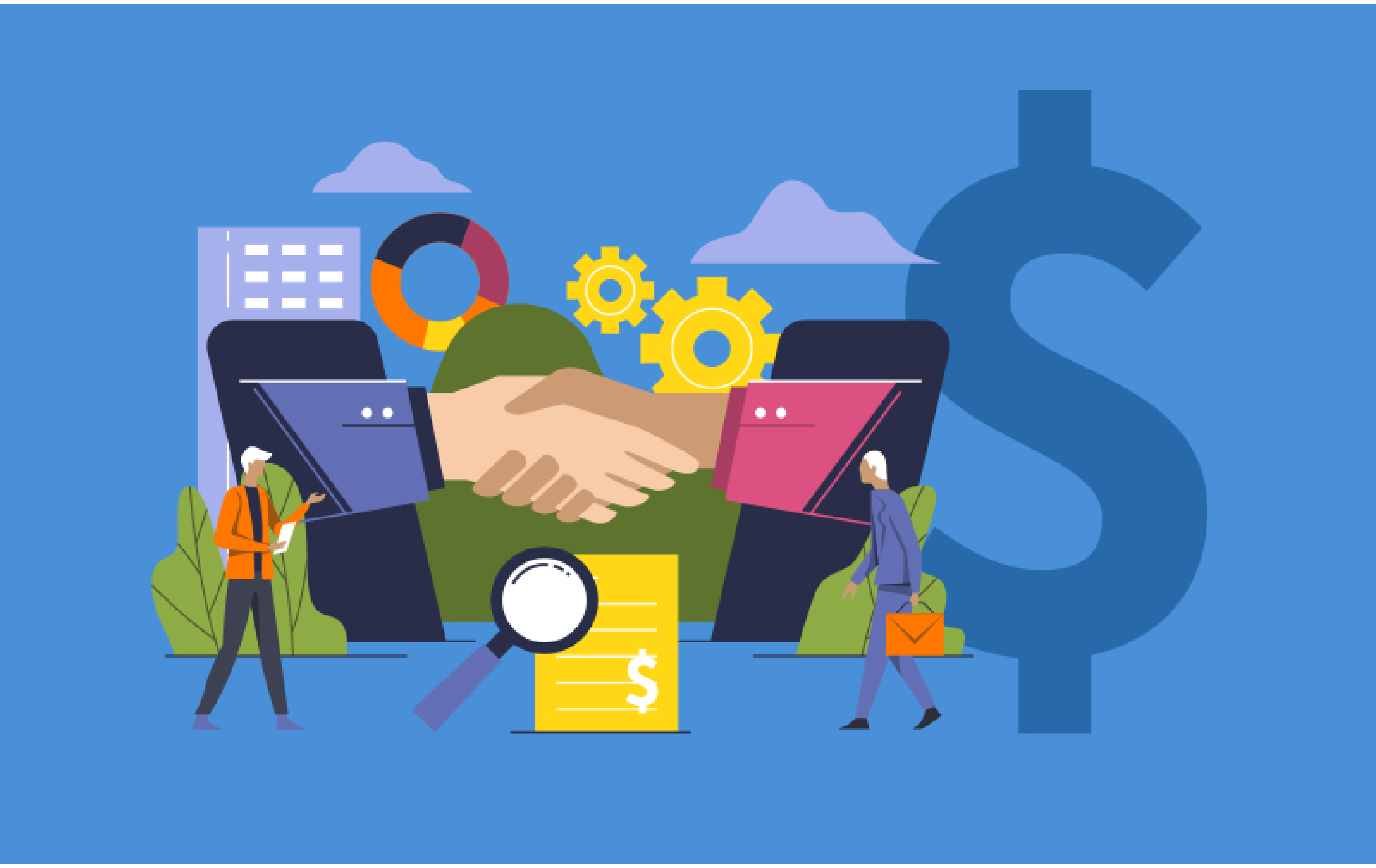
Will my consultant make a tailor-made plan for my non-profit organization?

Like already stated above, it is always beneficial to work with a Salesforce® consultant experienced in managing a nonprofit organization. Such a consultant can craft a specific technology services plan for your goals.

Your selected consultant could have worked on many Salesforce® projects in the past. However, this will be the first time they would be working with your organization. Hence the beginning stages of your engagement level should reflect that in their strategy or plan.

Decision makers along with the consulting team should work together to decide what efforts are most important to your mission? Which of your programs really push your cause forward? Do you thrive because of your sprawling volunteer program? Do you need a way to raise awareness and boost advocacy initiatives? So on and so forth.

What fundraising strategies bring in the most revenue? Knowing what tactics are already working can help inspire a larger strategy. Does your annual fundraising event have a special place in your community? Do text-to-give campaigns resonate with your contributors? Are you maximizing your peer-to-peer fundraising reach?



Give higher priority to a partner who takes a client-focused approach. Choose a partner who is enthusiastic to learn more about the operations of your nonprofit organization. A generic plan that does not account for individual nuances will leave you with an ill-fitting technology strategy.

What does success look like for your team? Since you have already established your goals for Salesforce®, make sure you and your consulting partner know how to measure your progress.

For some nonprofits, just getting an organized view of data is all they need. While others may have more specific requirements in mind. It could be an increase in fundraising revenue or more segmented outreach strategies.

It is highly important that you and your Salesforce® consultants are on the same page. From the very beginning be clear of your goals and how the platform helps you achieve it. But do remember, if your team is not clear about your vision, they will have a hard time communicating it to an external vendor.

If you can't answer the most important questions on your own, head back to step 1 to start some more brainstorming!

Is the guidance helping you? Keep reading we have a lot more in this whitepaper!

FAQ#6

Can I ask for the strategy plan from my prospective Salesforce® consultant? Check with your prospective Salesforce® consultant's plan for their proposed CRM strategy. There are a zillion ways to go about solving a problem. You might as well consider meeting a few Salesforce® consultants, before finalizing which strategy to go with. Different consultants can have different ideas about your strategy or customizations.

Create a list of Salesforce® consultants for nonprofits, with relevant experience, qualifications, and a matching price point. Next, you should ask your selected few about their specific strategy and process. That way, you will be able to find out more information about things like-

Evaluation and discovery process - It is important to know what steps & procedure they will follow to understand your current processes and

Salesforce® requirements. What is their process in terms of the number of resources and timelines, etc.?

Turnaround time - Check about how soon can they get started with your project. Ask them to share a schedule so that you know what time frame you should expect? What benchmarks & checks do they set along the way to keep your project on track? Most importantly, what is their plan to handle delays?

Training methodology - Check how do they plan to train your in-house team? Ask them if they will provide on-site training or remotely. Do they train your entire team at once, or provide the skills for a key leader to train the rest of the team.

No matter how excited you are about onboarding your new Salesforce® consultant, it is important to know how they get the job done. You will end with more smashes than making actual progress if their working methodology does not line up with your expectations. To make it work, both the participants have to be more flexible and realistic at the same time.

FAQ#7

Is it ok if I ask for references for my selected Salesforce® consultants?

You need to be sure that your consultant can deliver on what they promise. One of the best ways to verify that is to hear from nonprofits who have completed projects with this consultant.

Your prospective consultants should be happy to provide you with a list of nonprofit organizations they have worked with in the past.

Instead of a case study, an actual conversation with a former client can give you a more concrete idea of what the working relationship would be like. Take advantage of these discussions!

Ask more than just the basics questions. Ask about the details of the project. Check if the consultant delivered the way they committed. Did the follow the set timeline? You want to find out what the consultant's delivery standards have been in the past to ensure it interconnects well with your vision of the project.

How did the consultant manage roadblocks? Are their existing and past nonprofit clients satisfied with their work?

It is best to ask for project references that were similar to yours. You need to be sure the services you are requesting have been successfully delivered for other organizations, and that the clients are satisfied with what they got.

FAQ#8

Is it important to meet my prospective Salesforce® consultant in person before finalizing?

Certainly, it is beneficial to have a face to face meeting with your Salesforce® consultant.

Checking references might help narrow down the ground a little. But there is an even better way to find out if a consultant is right for you. If possible meet them in person if you are in the same location. If you are working with a remote consultant, a phone or video call can suffice. Just like a job interview, the one-on-one meeting can help you get a clear picture of who the consultant is and what it would be like to work with them.

Why face to face meeting is important?

It will help you clarify any grey areas with the consultant and talk about any concerns you have about their expertise. After this meeting, you should both be 100% clear on what you are looking for from this partnership.

Your team will be working closely with the consulting team, hence it is important to know if you will get along during that time. Make sure that your

Salesforce® consultants understand your nonprofit's mission as well as your team culture.

After meeting your selected top candidates, you should have a clear idea of which Salesforce® consulting partner would be the best fit for your organization. But the selection process is not over yet

Keep reading further to find out the final steps to zero down on the best fit.

FAQ #9

Define, the duration of partnership/stay of your Salesforce® consultant.

Ask your Salesforce® nonprofit consultant how their services fit in with your long-term and short-term goals. One factor that could still be a deal breaker in the selection process is the duration of your partnership.

Discuss in detail about the duration/tenure and engagement level. Read ahead to know more about different engagement levels-

Additional projects - Salesforce® can continue to be your CRM of choice a long time or forever. But that does not mean you will continue with the same strategy and processes forever. You might also want to set up a long-term plan for future expansions to your technology system. Ask your consultant what role they could play in future strategy shifts or software reconfigurations.

Ongoing support - If you are creating a totally custom Salesforce® solution, you might need ongoing consultant support. Find out if your Salesforce® consultant is equipped to answer all the questions and support you may require. Make sure you have a clarity of how much support your consultant can offer over time.

Communication - Discuss communication preferences with your consulting team to find out how you can contact them during and after you move out of the initial project. Know whether they prefer skype, phone calls or emails. Knowing what will be the turnaround time can help you set expectations for the ongoing partnership.

Salesforce® technology consultants tend to play a much longer role in your success than just one project. Since you will be using your Salesforce® for years to come. You need to know what to expect from your Salesforce® nonprofit consultant to make sure you are still maximizing your CRM tool for as long as possible.

FAQ #10

Will my Salesforce® consultant support and empower my internal team over a long run

Your Salesforce® consultant should enable your team to use Salesforce® in an efficient and productive way all by themselves. Of course, you may continue to have their services for a short or long term, depending on your requirement. Search for a consultant that prioritizes all of the below-mentioned aspects of a smart Salesforce® implementation:

Knowing what will be the turnaround time can help you set expectations for the ongoing partnership.

Strategic processes: From the beginning, your consultant should evaluate your current practices and help you improve your operations. Many

non-profits are limiting their potential because they don't realize there's a better way to go about a task. Your consulting team should understand Salesforce® best practices and strive to educate you on the tactics that can help you grow.

Thorough documentation: Do not let your consultant slip away while holding the keys to Salesforce® success! Make sure they have created comprehensible documentation that you can refer later. That way, you don't have to run back to your consultant every time you have a minor issue.

Staff engagement: Your internal team should be excited to work with your chosen consultant. Salesforce® consulting firm for your nonprofit or an association should be involved with all of your team members. They should be available to walk them through any questions or concerns they have about Salesforce®.

At the end of the consulting project, your staff should feel confident in using your Salesforce®. Find a consultant who is passionate about empowering your team to achieve those goals. You will have no issues taking the skills you have learned from such a consultant and put them into action.

We believe with our detailed whitepaper, you will be better prepared to find the consulting team you need for your nonprofit and association. We wish you all the best! **Hope you start using Salesforce® to its maximum capacity with the right consultant.**

About the Company

Aplusify is a team of Salesforce® consultants, project managers, Salesforce admins, solution architects, developers, business analysts, trainers, and data analysts with experience in Nonprofits and Associations. We have a readily available pool of certified Salesforce® experts, capable of solving any Salesforce® related issue, no matter how complex or trivial. We provide a long-term solution to help you manage and support your Salesforce® platform and act as a vital bridge between your organizational needs and technology.

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