EMPOWERING NON-PROFITS WITH SALESFORCE

+ A summary of high level outcomes which can emerge from embedding Salesforce Solutions within a non-profit organisation.
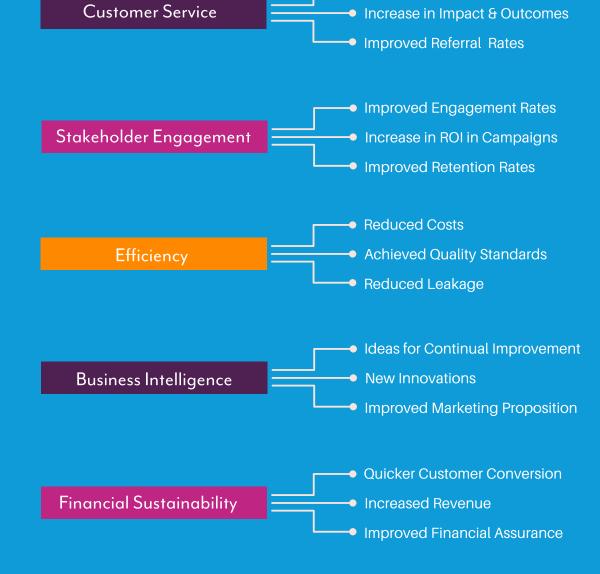
Economic Change
EMPOWERING NONPROFITS

Salesforce CRM

Improved Financial Sustainability
- Online Payment & Financial Integration
- Non-Profit Success Pack / Sales Cloud

Improved Customer Service
- Contact Management 360 Customer View
- Data Security & Management
- Customer Journey with Path & Flow

Improved Stakeholder Engagement
- Marketing Solutions
- Online Surveys
- Service Cloud, Chatter, Communities

Improved Business Intelligence
- Integrated Systems
- Einstein Analytics
- Reports and Dashboards

Improved Efficiency
- In the Cloud with Mobile/Tablet
- Automation of Processes

EXAMPLE INDICATORS

How to formulate the measures of success

1. Identify the drivers for organisational change

2. Review your current baseline statistics

3. Agree your goals for the future

4. Define the measures of success

5. Track performance with reports & dashboards

6. Review and evaluate performance

7. Celebrate success or refine strategy

Economic Change is a Salesforce

Implementation Partner who specialises in

helping non-profits maximise the value of their

Salesforce Solution.

Customer Service
- Improved Feedback Score
- Increase in Impact & Outcomes
- Improved Referral Rates

Stakeholder Engagement
- Improved Engagement Rates
- Increase in ROI in Campaigns
- Improved Retention Rates

Efficiency
- Reduced Costs
- Achieved Quality Standards
- Reduced Leakage

Business Intelligence
- Ideas for Continual Improvement
- New Innovations
- Improved Marketing Proposition

Financial Sustainability
- Quicker Customer Conversion
- Increased Revenue
- Improved Financial Assurance

Economic
Change
EMPOWERING NONPROFITS

Economic Change
EMPOWERING NONPROFITS

SIX KEY INGREDIENTS FOR CRM SUCCESS

Manage Data Integrity

Created trusted data by managing security, validation & cleansing

Senior Management Buy-In

If it's not in Salesforce it doesn't exist - Achieve 100% adoption of Salesforce to effectively support teams to perform.

Support People with Change Management

Manage communication, support adoption and realise benefits for users

High Level of Executive Sponsorship

Embrace the future, invest in resources and evaluate the return on investment

Internal Project Management

Appoint a dedicated internal resource for ongoing management of your system, users and budget

In-depth Business Analysis

Understanding user needs, learn from experts about the right technical solutions and develop a CRM Roadmap

KEY DEPENDENCIES

Realising the benefits of a CRM within a non-profit is dependent on a number of key ingredients. These ingredients need to be deployed by the non-profit during the implementation stage of the project working with an experienced consultancy and for the longer-term management of a system.

Economic Change CIC www.economicchange.co.uk