

Salesforce for Mid-Sized Nonprofits

A guide to the implementation process



The Value of Salesforce Salesforce with the Nonprofit Success Pack, commonly referred to as NPSP, is the leading CRM solution which powers the mission and increases the impact of nonprofits. With Salesforce, nonprofits get a powerful cloud based CRM with extensive, built-in functionality for fundraising and constituent management. This click-to-configure platform allows a nonprofit to customize their processes without the need for a developer. Salesforce with the NPSP can save your organization hundreds of hours per year with streamlined workflows, clean and unified data, and the ability to report on and visualize all of it.

And did we mention the price? Salesforce generously offers nonprofits ten free user licenses and deep discounts on additional Salesforce products. This gift can save nonprofits thousands of dollars per year.

Salesforce as a major investment

Even though your first 10 licenses are free, Salesforce is still a major investment and implementing it for your organization should be treated as an effort that requires a budget, staff time, and resources. The truth is, the more you initially invest in the planning and implementation of Salesforce, the more useful and effective it will be for your organization in the long run. Think of Salesforce not just as an IT tool, but as something that is core to supporting your organization's mission.

Any major investment requires vision, planning, and organizational executive buy-in. The same is true for Salesforce. This is not a side project. This is your organization's data, present day and historical, and where your core business processes will be conducted. You will need an expert nonprofit Salesforce consulting partner, and a basic implementation will typically cost at least \$50,000 - \$100,000. If you have complex program needs, the cost may be higher. Additionally, you should plan for some ongoing licensing costs for additional Salesforce products and third party apps. Finally, you will likely need a full-time Salesforce administrator who is familiar with the platform.

In addition to the financial investment, you will also need to invest time and energy for change management and adoption. Adopting a new CRM will require you to rework some of your business processes in order to achieve new efficiencies. While there are real pain points with your current database due to subpar functionality, a functionality upgrade will require additional data collection, standardization of procedures, and a new data-centric mindset. It will require significant work on the part of your departments to upgrade their processes and adopt a new system, but the resulting operational efficiency and increased ability to accomplish your mission are well worth it.

How does Salesforce benefit me if I'm a...

Director of Services

With Salesforce, your program data is standardized, accessible, and recorded in one centralized place. This makes it easy to pull reports for a grant report or for your upcoming board meeting. Additionally, you can now increase the scale of your services and ensure more effective outcomes.

Development Director

Instead of taking hours to put together a fundraising report for a board meeting or for the executive team, Salesforce makes it easy to report on your development data. Salesforce reporting gives actionable insights into your donors and helps you target your fundraising efforts and raise money more effectively.

Communications Manager

Before Salesforce, contact data may be spread across multiple spreadsheets, email solutions, and even in your executive director's head. With Salesforce, all your data lives in Salesforce, allowing you to pull email lists and reports with confidence.

Investment in improved business processes

Implementing Salesforce will take significant time and energy on your part as you improve and update your business processes. Your existing database is outdated or you have outgrown it. As a result, staff may be tracking things in spreadsheets that should be in the CRM, making reporting challenging. A well-configured Salesforce instance will allow you to bring everything back into the CRM and allow you to track more of your processes with a greater level of complexity and standardization, generating significant long-term rewards and insight. However, implementing it often requires significant changes for your organization.

In order to track more data, allow automation, and improve reporting in Salesforce, you will need to make adjustments to your business processes. Your expert nonprofit Salesforce consulting partner can help guide you through this process, but you will also need to have a Salesforce implementation working group that will make decisions for the organization during the implementation. Specifically, you will need an executive sponsor with a vision for the project and who is empowered to drive institutional change, as well as a project manager who will work closely with your implementation partner and lead decision making and deliverables within your organization.

Typically the time your implementation will take is largely dependent on your organization's ability to accomplish your tasks on the project. This will take some effort, and there will be a learning curve, but ultimately you and your organization will be the better for it.

Wrangling your data

And then there's your data. Chances are, your data is scattered across multiple systems: your old CRM, spreadsheets, email marketing solutions, event registration systems, your financial ledger, etc. Your joint task with your implementation partner will be to determine which systems will be retired, what data will be migrated to Salesforce, and which systems will be integrated to Salesforce. Then the task will be to gather all of that data, and compile, clean, and standardize it so that it will be ready to import into your new Salesforce system. Some of this work will be done by your implementation partner and some by your staff, but it is a significant process that will require time and energy from your staff.

Investing in a Salesforce administrator

Once Salesforce is implemented, you will need a Salesforce administrator as part of your IT or Operations department to support and maintain your system. Consideration for this role should be a part of your pre-project plan. In fact, this administrator should be in place prior to starting your Salesforce implementation and should be heavily involved in the project. A significant portion of their training will be accomplished during the project.

Choose your administrator wisely. If your administrator is talented and experienced, you will have much greater success and minimize costs in the long run. Your Salesforce administrator could be a new hire, or you could identify an existing staff member who has the expertise and willingness to move into this new position. For larger implementations you may need a team of Salesforce administrators with your consulting partner to augment as needed and take on additional projects.

Don't forget training

Your Salesforce implementation won't do you much good if you don't know how to use it well. Make sure there is adequate training included in the project. A good rule of thumb is to have at least 10-15 percent of your implementation budget allocated for training. Some of that training will be for your administrator, while other training will be for your end users. Training will include basic Salesforce functionality, use of third party apps, as well as training on the business processes your end users will be using in Salesforce. Record the trainings if possible and have your Salesforce administrator become your in-house trainer. Your Salesforce administrator should also prioritize creating documentation of your system in case of staff turnover.

Commit to adoption

Once your project is complete, adoption becomes the crucial task. Change is hard and you may have staff members who find it easier to keep using the old systems. This is where executive buy-in is crucial. Using Salesforce needs to be an expectation and added to job descriptions. Operate with the motto that "if it isn't in Salesforce, it didn't happen." In the first few months post launch, have your administrator regularly meet with end users to answer questions, provide additional training, and ensure that they are adopting successfully. After initial adoption, your administrator should continue to periodically meet with those teams to discuss pain points and determine whether these are issues with adoption or if they are concerns that need to be addressed with further configuration. Your administrator should also continue maintaining and updating Salesforce documentation. Consider whether you want to contract your consultant for ongoing support or use Salesforce Premier Success to assist you as you move forward.

Once Salesforce is implemented, enjoy the power and efficiency of your new CRM. You can now track more, see more, and do more. You now have the opportunity to raise more money, connect more effectively with your constituents, and advance your mission. Congratulations on a Salesforce implementation well done!

We wish you great success in your Salesforce implementation. Please let us know if Dayspring Partners can be of assistance to you as you proceed forward with Salesforce. You can contact **Dale Gish** at dgish@dayspringpartners.com or **(415) 247-9421 ext. 131**, or fill out our contact form at <https://www.dayspringpartners.com/contact/>