



# Supporting Black Nonprofits

The Importance of Having a CRM Strategy to Scale



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# Welcome



# Upcoming Webinars

## Every Thursday of February

**Feb. 18<sup>th</sup>**

Supporting K-12 Administrators | [bit.ly/ecgk12schools](https://bit.ly/ecgk12schools)

**Feb. 25<sup>th</sup>**

Supporting Black Schools | [bit.ly/ecgblackschools](https://bit.ly/ecgblackschools)



**Tiffany Spencer**

 /TheTiffanySpencer



 @TheTiffSpencer

## Esor Consulting Group, COO | Founder of HBCUforce

Tiffany Spencer is a 7x certified, Salesforce MVP and Co-Leader of the Orlando Salesforce User Group. She has more than a decade of working with companies to implement Salesforce.com solutions. Tiffany has worked across several industries, including finance, technology, real estate and nonprofit. In the community, she serves as president for Black Orlando Tech and a mentor with The Greatest Investment Girls Empowerment Program.

# Our Panelists





 /8-cents-in-a-jar  
 @8centsinaJar

**Lashea Reaves**

## **Founder of 8 Cents in a Jar**

Founded by Lashea Reaves in 2016, 8 Cents in a Jar, Inc. is an award-winning 501(c)(3) nonprofit organization serving the Central Florida community to create opportunities for underserved students to achieve economic mobility through financial education. 8 Cents in a Jar uses the power of Salesforce to manage the students and programs, along with gaining insights to donations and metrics for scaling growth.



 /vevienneebanks  
 @vevienne

**Vevienne Ebanks**

## **Certified Agile Practitioner & Community Ambassador**

Vevienne Ebanks is a Certified Agile Practitioner with over a decade of Information Technology experience. Roles held over the years include Business Analyst, Lead Functional Analyst and, Scrum Master. She is passionate about education and philanthropy and serves on two nonprofit boards, Pace Center for Girls Palm Beach and Path to College.

# Topics

Challenges Faced by Nonprofits

01

What is a CRM and why do you need it?

02

Organizing Customer Data

03

Automate Business Functions

04

Reporting and Data Visualization

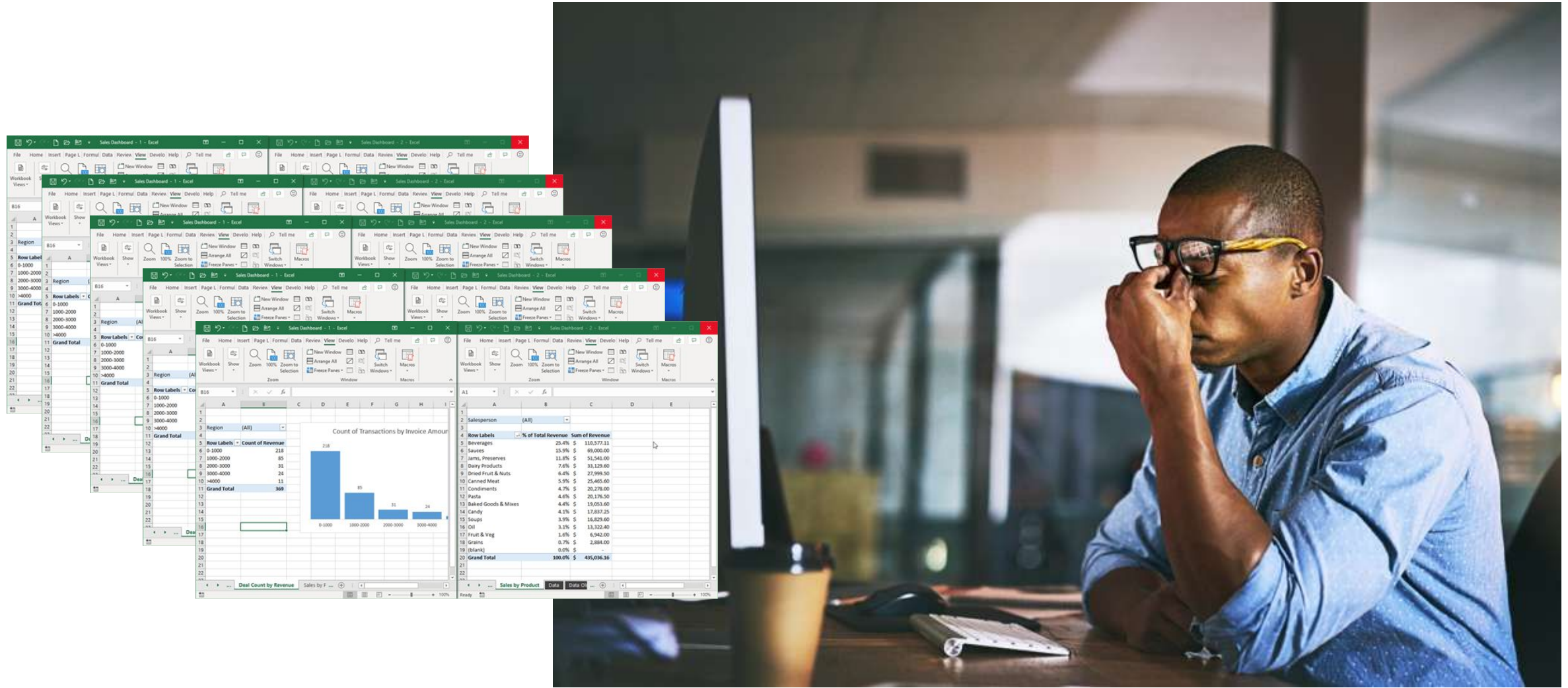
05

We want to hear from you!

06

# Challenges Faced by Nonprofits

# CRM 101





# Key Challenges Faced by Nonprofits



Increased demand  
for services



Accessible, Reliable  
and Real-time  
Information



Inefficiency  
Tracking  
Donations



Inflexibility of  
visibility within  
the organization

# What is a CRM and why do you need it?

# Organize Customer Data to Build Data Transparency



# Organizing Customer Data

# Single-Source of Truth Data

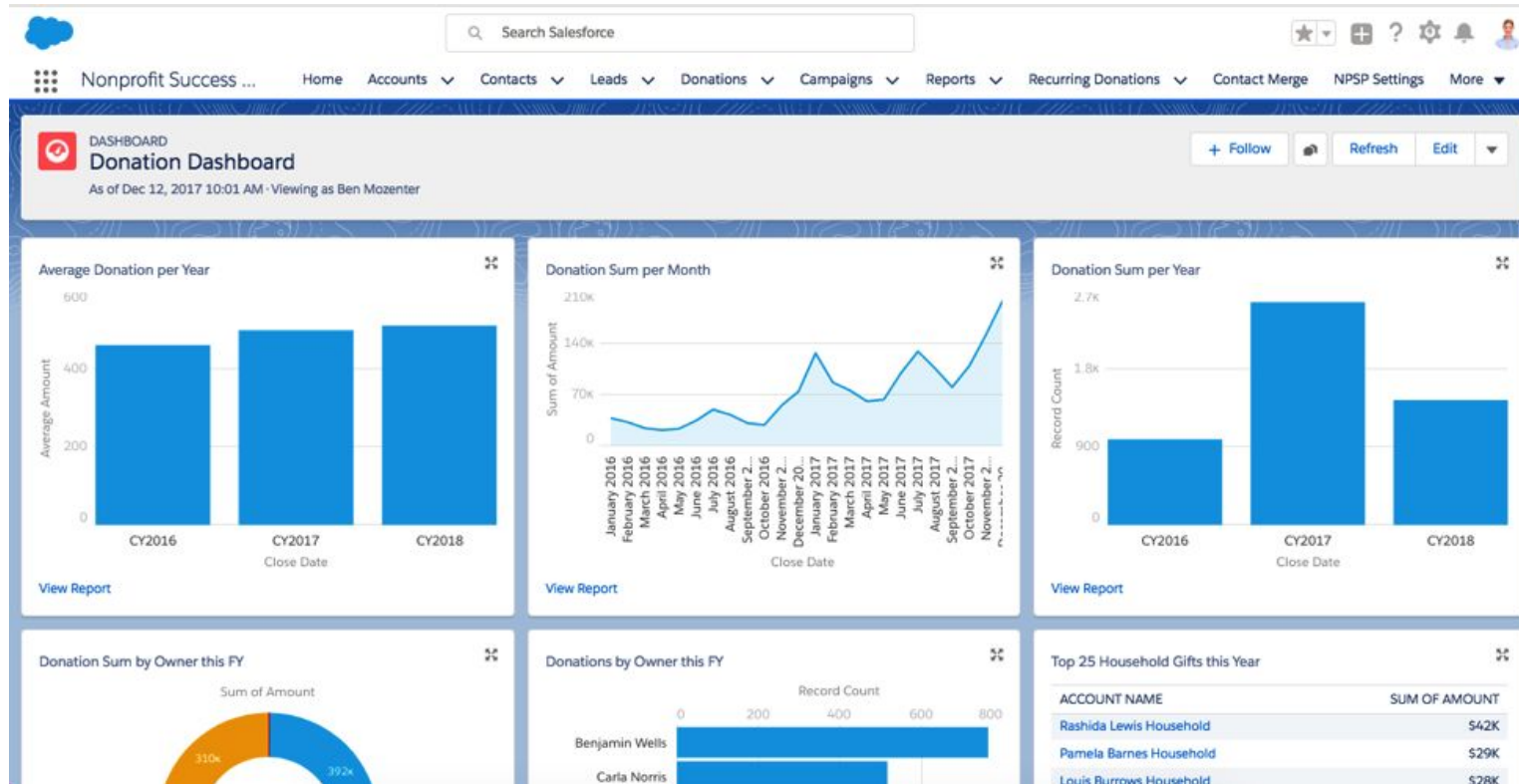


# Single-Source of Truth Data



## Volunteer Management

# Single-Source of Truth Data



## Donation Management

# Single-Source of Truth Data

The screenshot displays a Lightning App Builder interface for an 'Account Record Page'. The main content area features a Tableau visualization titled 'Sales Activity by Team Type' for 'Dickenson plc'. The visualization includes four line charts: 'Emails', 'Calls', 'LinkedIn Messages', and 'Customer Meetings', each showing activity from June 1st to August 1st. Below the charts is a summary table of sales activity by team type and individual salesperson.

Team Type	Salesperson	Value
Field Sales	Geraldine Zanolli	52.5K
	James Smith	27.0K
	Pierre Dupond	15.2K
	Amanda Johnson	8.1K
Inside Sales	Lee Graber	20.5K
	Geraldine Zanolli	22.1K
	James Smith	10.8K
	Pierre Dupond	7.3K
Field Sales	Geraldine Zanolli	153
	James Smith	149
	Pierre Dupond	51
	Amanda Johnson	77
Field Sales	Geraldine Zanolli	7.4K
	James Smith	4.6K
	Pierre Dupond	2.6K
	Amanda Johnson	1.8K
Inside Sales	Lee Graber	119
	Geraldine Zanolli	8.9K
	James Smith	3.8K
	Pierre Dupond	3.2K

The right-hand configuration panel shows settings for the Tableau visualization, including the URL 'https://us-west-2a.online.tableau.com/t/gzr', a height of 550, and options for tabs, toolbars, and filters.





# How to automate business functions to help scale

# Automate Everyday Business Functions

**Builder**

ENTRY SOURCES

- Data Extension
- API Event
- Audience
- CloudPages
- Salesforce Data
- Event Data

ACTIVITIES

Messages

- Send SMS
- Send Push
- Send Email

Advertising

- Ad Audiences

Flow Control

- Decision
- Random
- Engagement

Journey Plan Duration: 5 days

What do you want to say?

**Best Practice Recommendation**  
Send your well wishes for the customer's happy day! Provide an offer or celebration coupon, including details about expiration or limitations.

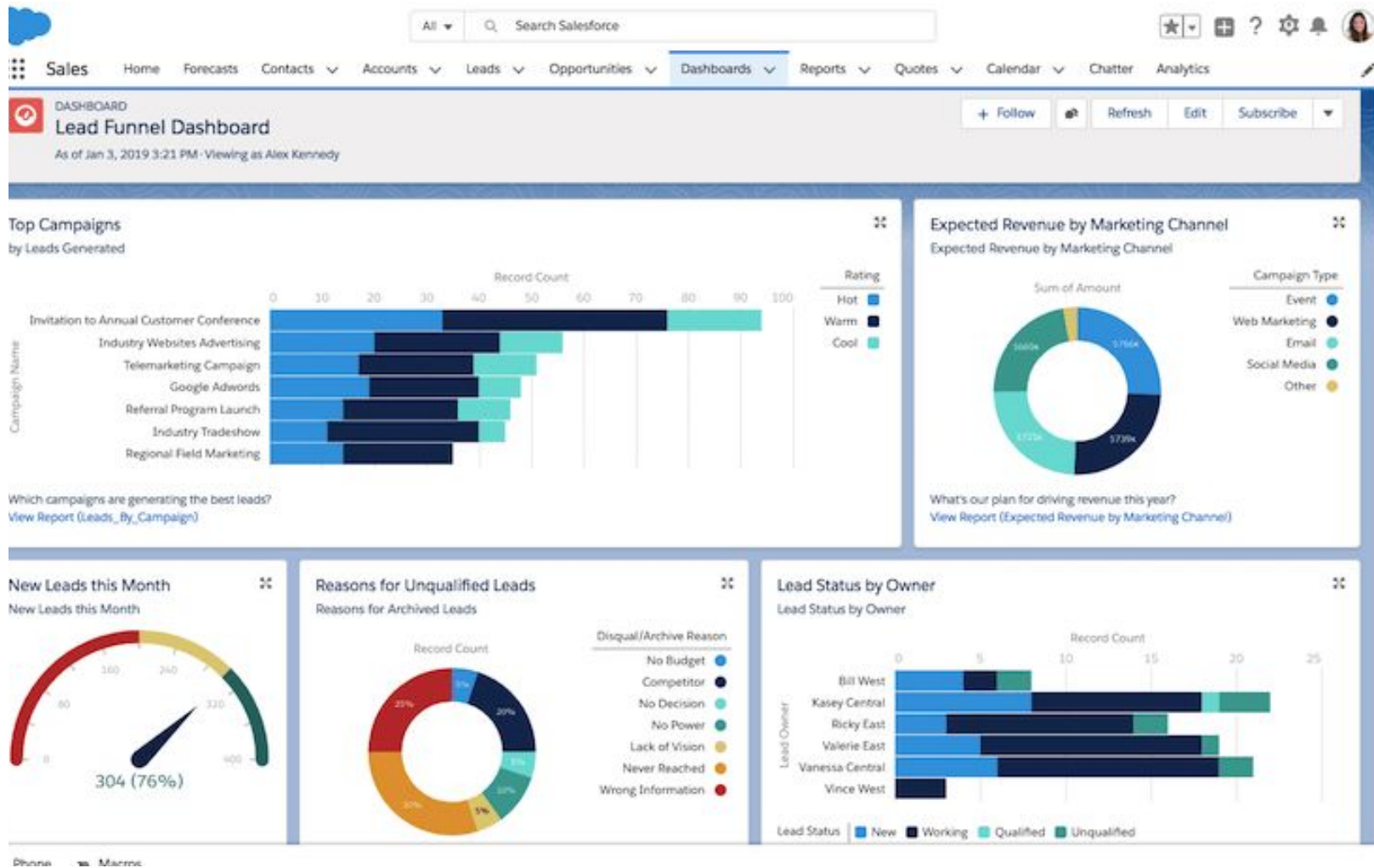
**More Information**  
[Send Email Activity](#)



Automate teams manual processes

# Reporting and Data Visualization

# Reporting and Data Visualization



## Reports & Analytics

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 /veviennebanks

 @vevienne



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## Contact Us



EMAIL  
[info@esorcg.com](mailto:info@esorcg.com)



WEBSITE  
<https://esorcg.com/>



PHONE  
(201) 357-7451