



Salesforce Non-Profit Quick Start

Who we are

Necessidad Consulting Ltd is a Salesforce and Resco implementation consultancy based in London, United Kingdom. We are a Registered Salesforce Partner, Salesforce.org Partner and Resco Professional partner. We offer multi-cloud Salesforce implementation services for Sales Cloud, Service Cloud, Salesforce NPSP and custom Salesforce Platform configurations; as well as Resco for Salesforce implementation services for Non-Profit and SME organisations.

Our core value is to make a significant and positive impact in organisations we serve.



salesforce **PARTNER**

salesforce.org **CONSULTING PARTNER**

resco.net
Professional Partner

EXCLUSIVE PARTNER
Resco for Salesforce

Sales Cloud

Service Cloud

Non-Profit Cloud

Experience Cloud

Salesforce Platform

PLEDGE
1%



What is Quick Start Who is it for ?

What is Quick Start

Our Quick start service provides you with the essential important features of the cloud of your choice to get your organisation up and running with Salesforce as quickly as possible.

Who is it for?

Quick Start is perfect for small-medium businesses or non-profit organisations who have Salesforce “out of the box”.

Quick Start is an excellent way to extend your platform’s capabilities - quickly expanding your connected platform.



Benefits of Our Quick Start

Cost Savings

We believe Quick Start should not be expensive, that's why we are competitively priced to deliver excellent service

Immediate Value

Our Quick Start implementation will get you up and running fast so you can start realising the rewards of your investment

Digital Transformation

Transform your business or charity organisation with customisable platform that grows with you. Find, win, and keep customers

360 Data

Have a single shared view of your customers' data, history and interactions with your team on a collaborative platform

Start Small & Scale Up

A scalable solution that matches your business and sets you up for future success

Fixed Price Engagement

With a fixed budget and defined scope you can be rest assured

Optional Ongoing Support

Our managed services can continue to provide support and enhancements.

Best Practice Implementation

Based on tested approaches built on years of experience delivering successful projects

Our Approach

We will take care to understand your organisation's needs and processes, offering you the optimal solution to get you up and running smoothly

Our team will work with you to ensure your new Salesforce instance delivers maximum value to your business

We offer different types of Quick start packages, mainly Sales Cloud, Service Cloud & Non-Profit Cloud

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Salesforce Non-Profit Cloud (NPSP)

The NPSP Cloud Quick Start Package is tailored to help you get up and running quickly. Without the fuss.



People and Organisations

Track households, companies, foundations, or other organisations with whom your organization has a relationship



Gather Insights

Visualise real-time reports and simple dashboards to help understand performance and drive decisions.



Donors & Donations

Track and acknowledge one-time donations, pledge payments, and recurring donations.



Engage Constituents

Manage all of your constituent engagement efforts with campaigns.



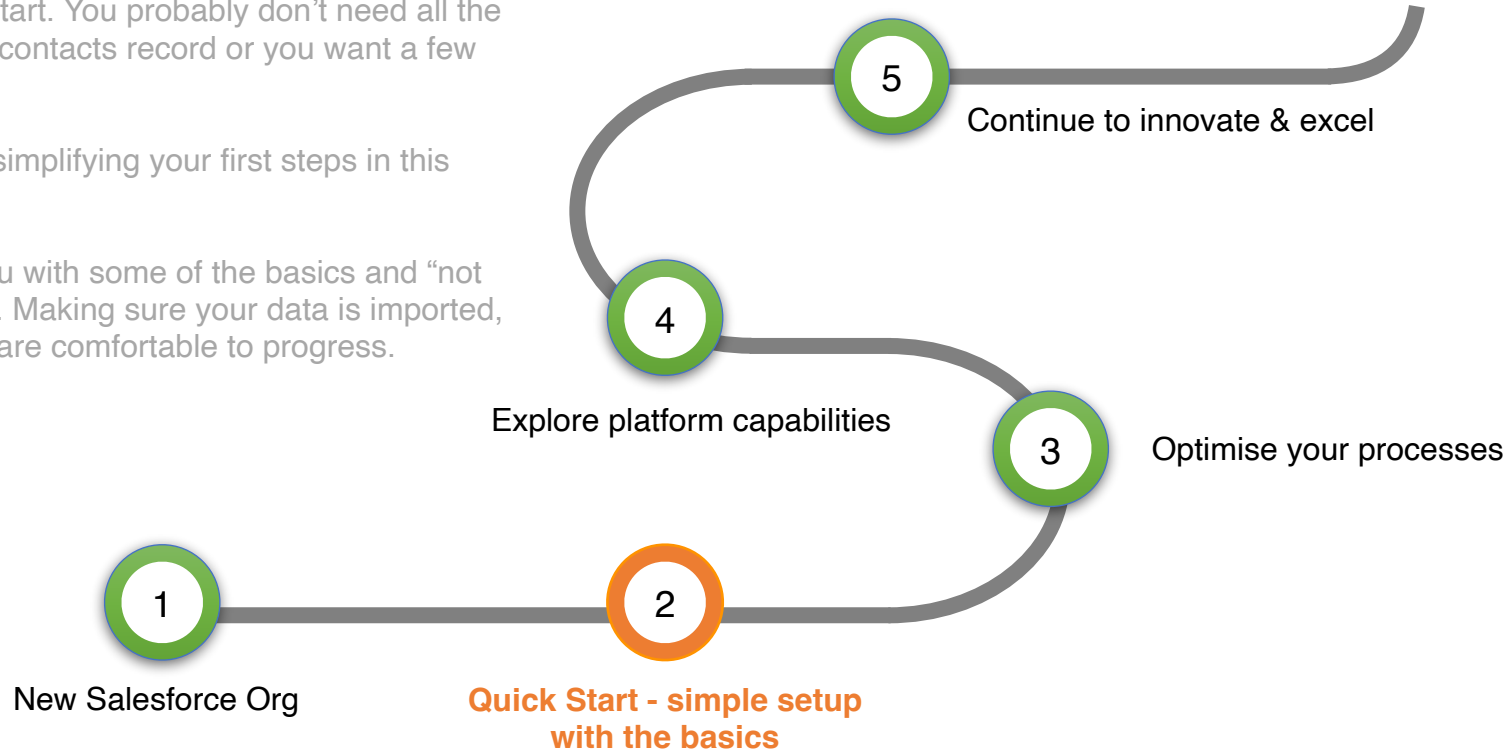
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Your Journey with Salesforce Non-Profit Cloud

After signing-up for Salesforce, having all those features may seem overwhelming to start. You probably don't need all the fields displayed on your contacts record or you want a few other features enabled.

Our quick start looks at simplifying your first steps in this wonderful journey.

This includes guiding you with some of the basics and "not so basics" of Salesforce. Making sure your data is imported, setup properly, and you are comfortable to progress.



Of course, your journey doesn't end here. Salesforce offers rich capabilities that, together with optimised processes and a trusted partner, you can continue to innovate and excel.



What to Expect - NPSP Quick Start Package



- ✔ **A kick-off call**, and another discovery call (approx 2 hours) to ensure we have a shared understanding of your needs.
- ✔ **Basic configurations** so you can view and capture the data you need: such as organisations, people, households and donations data. Data quality is important, so we will ensure simple and appropriate duplicate / match rules are included. You can expect to be able to manually capture one-off donation data, recurring donation, major and matching gifts.
- ✔ To keep things simple and lean, we will create **(up to 50) additional fields** you require and hide the fields you do not require at this time from the pages on various objects. Don't worry you can unhide them should you wish to use them later on. The objects (and record-types) we will configure are the standard: **Account(2), Campaign(1), Campaign-Member(1), Contact(1), Opportunity(2), Recurring Donations(1), and Payment(1)**. Each of these will have only one corresponding page-layout.
- ✔ We will configure up to **10 reports and 1 dashboard** as well as a standard Salesforce **integration to your Gmail or Office 365**.
- ✔ Data is the life-line of any system so we will provide you with csv templates for you to populate with cleaned, deduped data. We will do a one time **import of up to a combined total of 100,000 records** of the data you provide (in the csv template) into Salesforce using standard salesforce import tool.
- ✔ User setup (1 profile) and 2 hours **remote online training** for your users.



Fixed price. Service only. This fee excludes any additional Salesforce licenses.



What to Expect - NPSP Quick Start Package



Setting the the right expectations is also about knowing what **not** to expect. Because this is a quick-start designed to get you up and running fast, **some services are excluded** but could be purchased separately.

These are:

- ⊗ Configuration of any online forms
- ⊗ Salesforce Service Cloud capabilities beyond Cases (Knowledge, Entitlements, Milestones, etc)
- ⊗ Configuration of Salesforce Approval Processes
- ⊗ Installation of AppExchange packages
- ⊗ Programmatic Development (Apex, LWC, VisualForce pages, etc)
- ⊗ Integration with 3rd party systems (such as integrated payment sources)
- ⊗ Technical Documentation
- ⊗ Multiple languages and currencies

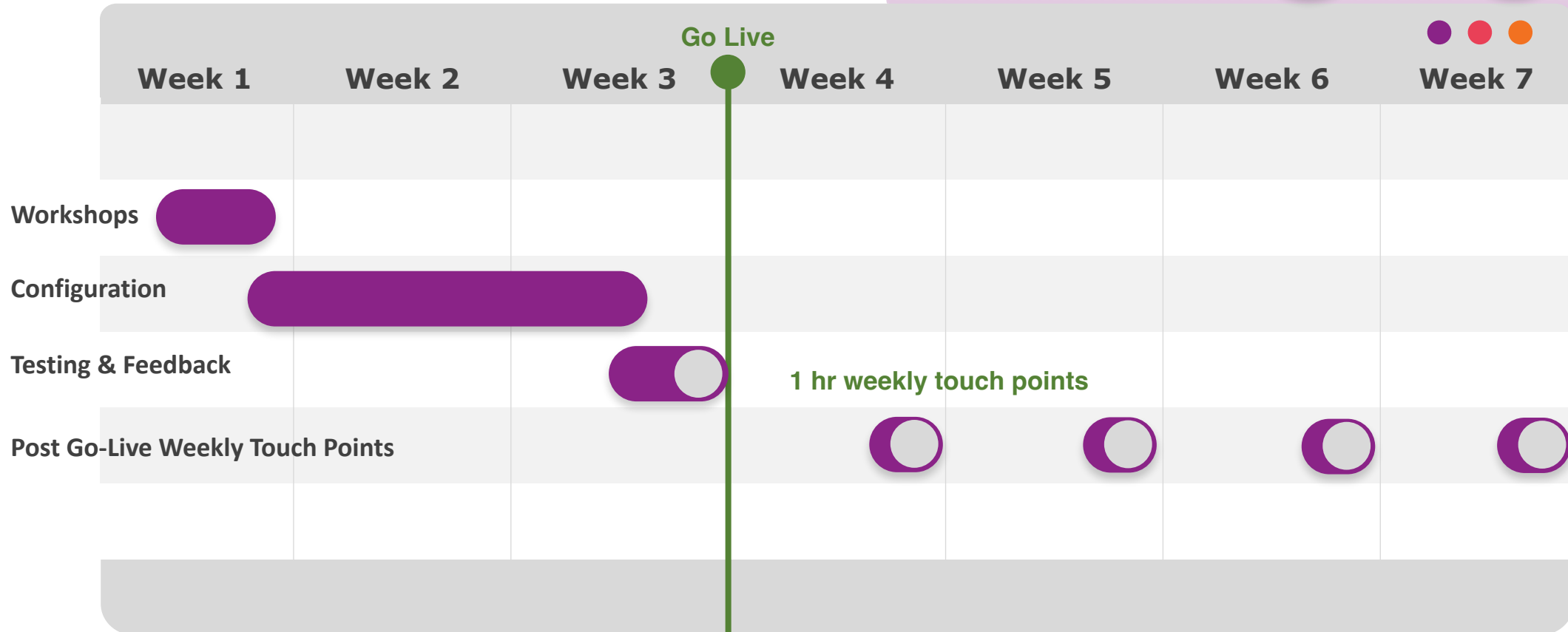
What we expect from you are:

- ✔ A new, clean Salesforce Power of Us Instance (10 donated licenses + NPSP) - click [here](#) for eligibility
- ✔ Signed-off statement of work with Necesidad
- ✔ Availability of your authorised representative(s) / stakeholders



What to Expect - NPSP Quick Start Package

Approximate Implementation Timeline: 3 weeks



Target Market - NPSP Quick Start Package



Our success stories



“Necessidad worked with us on our local area's Covid-19 emergency response hub. We used Salesforce to referrals from clients in need and Necessidad used a variety of solutions to work flexibly and quickly to address the urgent needs. They worked hard to understand our requirements without rushing into a solution. The project was difficult because of the time pressures to get things live and they did an excellent job of combining in-built Salesforce functionality with custom solutions where necessary”

“Necessidad is highly experienced and extremely knowledgeable when it comes to Salesforce...They communicate effectively and work collaboratively to produce high quality work. I would recommend Necessidad as a partner to anyone wanting a Salesforce partner.”



Frequently Asked Questions

1. Can we have optional extras that are not in the packages?

Yes, we can include certain optional configurations to meet your requirements beyond the scope of the packages.

2. What options do we have to make changes months later on ?

We offer a suite of optional managed services to provide proactive support and minor enhancements to your Salesforce environment. Over time, you will need a little more from your CRM, we also offer other implementation services to bridge the gap and take you further.

3. Can we include 3rd party applications?

Yes, outside of the Quick Start Packages. In this cases, we can guide you with the selection and installation of 3rd party Salesforce AppExchange applications of your choice. Depending on the application, consulting the provider may also be required.

4. How long will it take to start using the system?

We aim to complete our quick start implementations within 10 days.





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