

Enhancing Constituent Engagement through Salesforce Einstein Next Best Action (NBA)

Client National Kidney Foundation (NKF) | **Industry** Non-Profit Organization

Project Scope

Implementing Salesforce Einstein Next Best Action (NBA) to optimize constituent interactions and increase user adoption within Salesforce.

Background

After Equals II's successfully delivery of Salesforce Einstein Prediction Builder (EPB) for NKF, the NKF recognized the value of converting predictive insights into actionable steps. NKF leaders sought to enhance Salesforce users' engagement by

guiding them toward meaningful interactions with constituents. Thus, implementing Einstein Next Best Action (NBA) became the optimal next phase of their digital transformation journey.

Project Objectives

The primary objective of the NBA project was to leverage the predictive models and insights generated during the EPB project to create actionable recommendations for Salesforce users. These recommendations aimed to:

- Improve Constituent Engagement**
Provide personalized suggestions for interactions that resonate with NKF's diverse constituent base.
- Increase User Adoption**
Encourage Salesforce users to track and manage more data within the platform, setting the stage for future strategic initiatives.
- Optimize Decision-Making**
Transform existing data into forward-thinking business decisions that derive more value from NKF's CRM tools.



Implementation Strategy

Equals II employed "The Equalizer Way" to deliver the NBA solution, following key steps to ensure success:

- Target Persona Selection**
Identified and defined the user groups, such as field staff, who would benefit from the recommendations.
- Scenario and Use Case Identification**
Detailed the specific business scenarios where NBA would be deployed, such as donor engagement, volunteering and advocacy, medical professional connections, event outreach, and "know your constituent" processes.
- Recommendation Development**
Created actionable recommendations tailored to each use case, including personalized communication and strategic outreach efforts.
- Strategy Creation**
 - Established business rules guiding NBA recommendations.
 - Mapped predictive outputs to actionable steps.
 - Prioritized actions based on impact and relevance.
- Recommendation Embedding**
Integrate NBA recommendations into the Salesforce user interfaces to ensure seamless execution.

Outcomes

The NBA project provided NKF with a sophisticated tool for driving personalized engagement and maximizing the effectiveness of their Salesforce CRM. Key outcomes included:

- Enhanced Engagement**
By offering tailored actions like personalized communication, donation opportunities, and volunteer outreach, NKF users were better equipped to connect with constituents.
- Improved User Experience**
The NBA solution facilitated more accessible interactions and encouraged greater user adoption, with more Salesforce users actively engaging with the platform.
- Strategic Insights**
Thanks to the actionable insights and recommendations from the NBA tool, NKF is now positioned to make data-driven decisions supporting its mission.

Future Considerations

Although the NBA project was highly successful, some recommendations were identified as part of a backlog for future implementation, pending the development of more mature business processes. These include early-bird registration offers, personalized outreach for living donors, and more sophisticated engagement strategies for flexible giving options.

Conclusion

The successful implementation of the Einstein Next Best Action project by Equals II for the National Kidney Foundation underscores the tremendous power of personalized, data-driven engagement strategies in the non-profit sector. With this project, **NKF is better equipped to fulfill its mission and poised to lead with innovation in constituent engagement and relationship management.**

