Using a Salesforce Database to Build Membership and Donations

"You may not know what you are missing!"

Helen Tjader, Acorn Nonprofit Solutions

Using a Salesforce Database to Build Membership and Donations

Today's presentation includes two segments:

- Part 1 - Selecting Salesforce for CRM
- Part 2 - A look at the Salesforce Nonprofit template

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Part 1 - Selecting Salesforce for CRM

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RILWP

The Rhode Island Land and Water Partnership

- Formed in 2003 to support networking among 40 land trusts in Rhode Island and a dozen watershed nonprofits in the Narragansett Bay Watershed
- Goal - improve the networking and capacity of these organizations
- One key project – Donor/Membership management resources suitable to our small nonprofit organizations
- Result – the development of a customized version of 'Salesforce' updated to its new Nonprofit Template.
- Some partners have been using Salesforce for about a year now; some for about a month. Other partners have chosen to use DonorPerfect or Access. Another option for small nonprofits is eTapestry.

Acorn Nonprofit Solutions

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Grow Strong!

- Professional consulting firm formed in 2009 to provide affordable backoffice support services to small nonprofits.
- Initial projects have included a variety of services for the RILWP supporting the adoption and transition to Salesforce by partner organizations including this presentation and tip sheets that will be available at the RILWP website in the future.

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What does your organization currently record about your donors, volunteers and members?

- Basic personal & business information
  - Names, address, phone, email
  - Membership status, join date
  - Donation records
  - Volunteer roles
  - Event participation

What are you putting into the 'hat'?

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What does your organization extract from its donor and membership records?

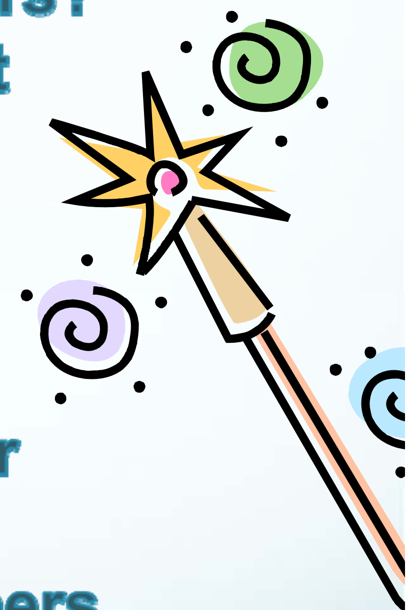
- Basic Lists of Information
  - Mailing labels
  - Membership & donor rosters
  - Donation totals
  - Volunteer rosters
  - Event participation lists
  - Federal reporting, Form 990, information

What does your organization create from its donor and membership records?

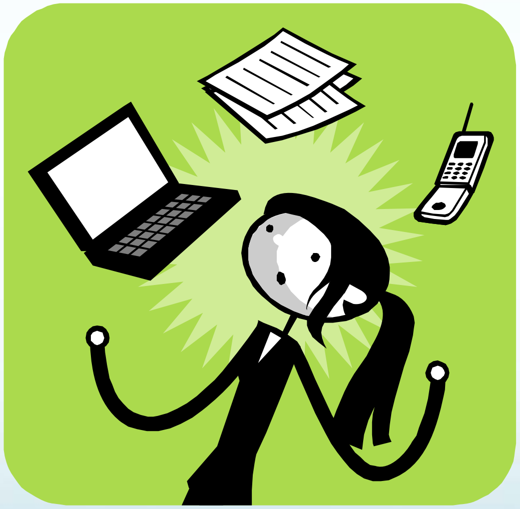
- More advanced items
  - Personalized communications
    - Letters
    - Emails
    - Website
  - Donor relationship links
    - Soft credits
    - Multiple donors
    - Memorials
    - Grants
    - Product sales

How does your organization analyze donor, volunteer and membership records?

- Who are your ‘best’ volunteers and donors?
- Was your most recent campaign or event successful and cost effective?
- As successful as in prior years?
- Is gift size increasing?
- Is donor participation increasing?
- Is your member/donor base expanding or contracting?
- What is the source of your newest members, donors and volunteers?
- Have all your acknowledgments been sent?



If you could not easily answer these questions, you are not alone!



The very largest organizations struggle with these tasks…

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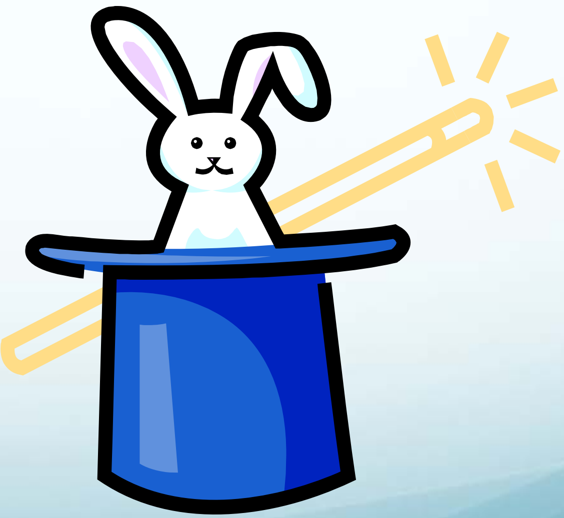
But even the smallest nonprofits need to be able to reach into the ‘hat’ and retrieve the bunny!



The Rhode Island Land and Water Partnership studied the needs of all of our local land trusts and watershed groups.

- Every organization had the need to

  "build capacity"

  - Growing membership/donor base
  - Building an endowment
  - Recruiting volunteers
    - One-time events
    - Ongoing roles
- Every nonprofit, large and small, shared these fundamental needs.
- These issues were particularly acute in all volunteer organizations.

What was the biggest obstacle to building capacity?

Inadequate means to track and analyze donor, member and volunteer interactions.

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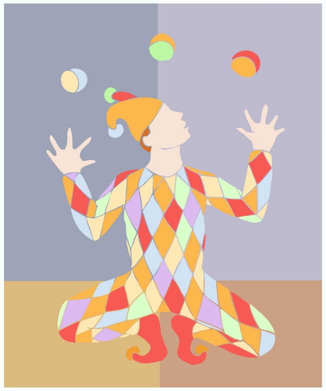
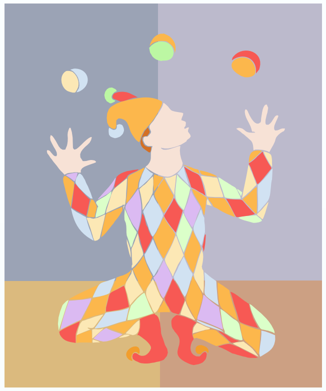


The Solution?



CRM software to track and analyze donor, member and volunteer interactions.

WAIT!!!
What is CRM?

CRM stands for Customer Relations Management. In the 'for-profit' world, CRM software products are used to track all aspects of sales and customer communications.

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Why should we care about CRM?

Per Wikipedia, “CRM is not just a technology, but rather a comprehensive, customer-centric approach to any organization’s philosophy of dealing with its customers. This includes policies and processes, front-of-house customer service, employee training, marketing, systems and information. Hence, it is important that any CRM implementation considerations stretch beyond technology toward the broader organizational requirements.

But we’re a nonprofit – CRM doesn’t apply to us!

Although CRM is usually described in ‘for profit’ terms, every nonprofit relies completely on connections with its members, donors and volunteers in order to fulfill its mission.

If new links are not established, if past links are lost or broken, your nonprofit will lose its way.

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But this sounds complicated! Yes…There are many products and variations of services to consider.

So the partners of the Rhode Island Land and Water Partnership worked together to research, test and then use products best suited to our nonprofit needs, capabilities and budgets.

What were we thinking!?!

- It had to be easy enough for volunteers who did not work with the software daily to understand data entry and reporting.
- It had to be robust enough to include most of the features desired by our partners.
- It had to be flexible enough to be adapted in the future as our partners grow.
- We wanted a common software product so customizations and learning could be shared between partners.
- We wanted an online solution.
- And…

It had to be extremely inexpensive!

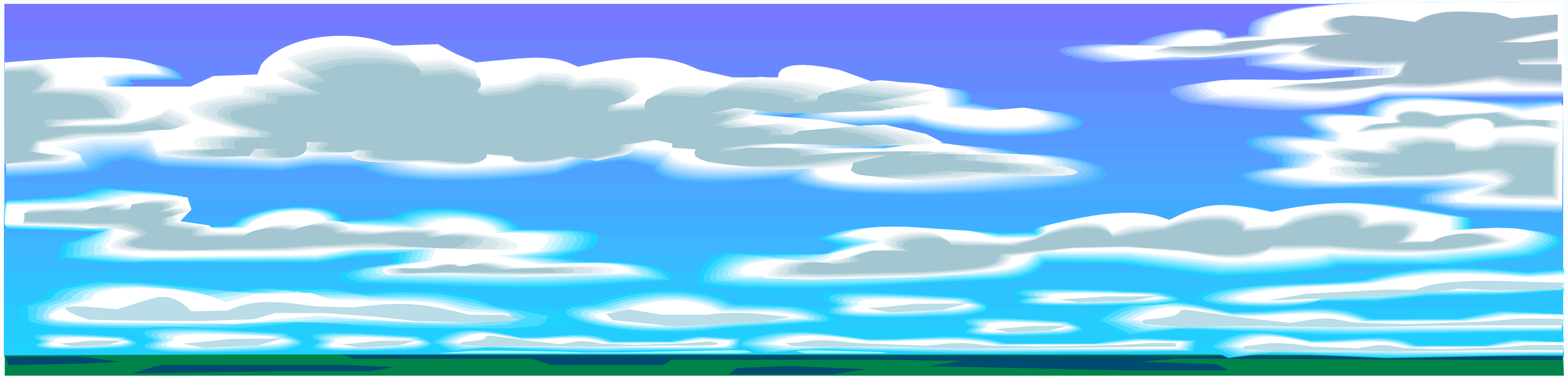
OUR SOLUTION?

The Nonprofit Template donated by Salesforce.com Foundation, a nonprofit organization established by Salesforce, a leader in online CRM software.

Salesforce is a leading provider of 'CLOUD' computing solutions for CRM.

Salesforce™
for Nonprofits

SOFTWARE®



We really like clouds… but what is ‘Cloud Computing’? Why would we want to ‘work in a cloud’?

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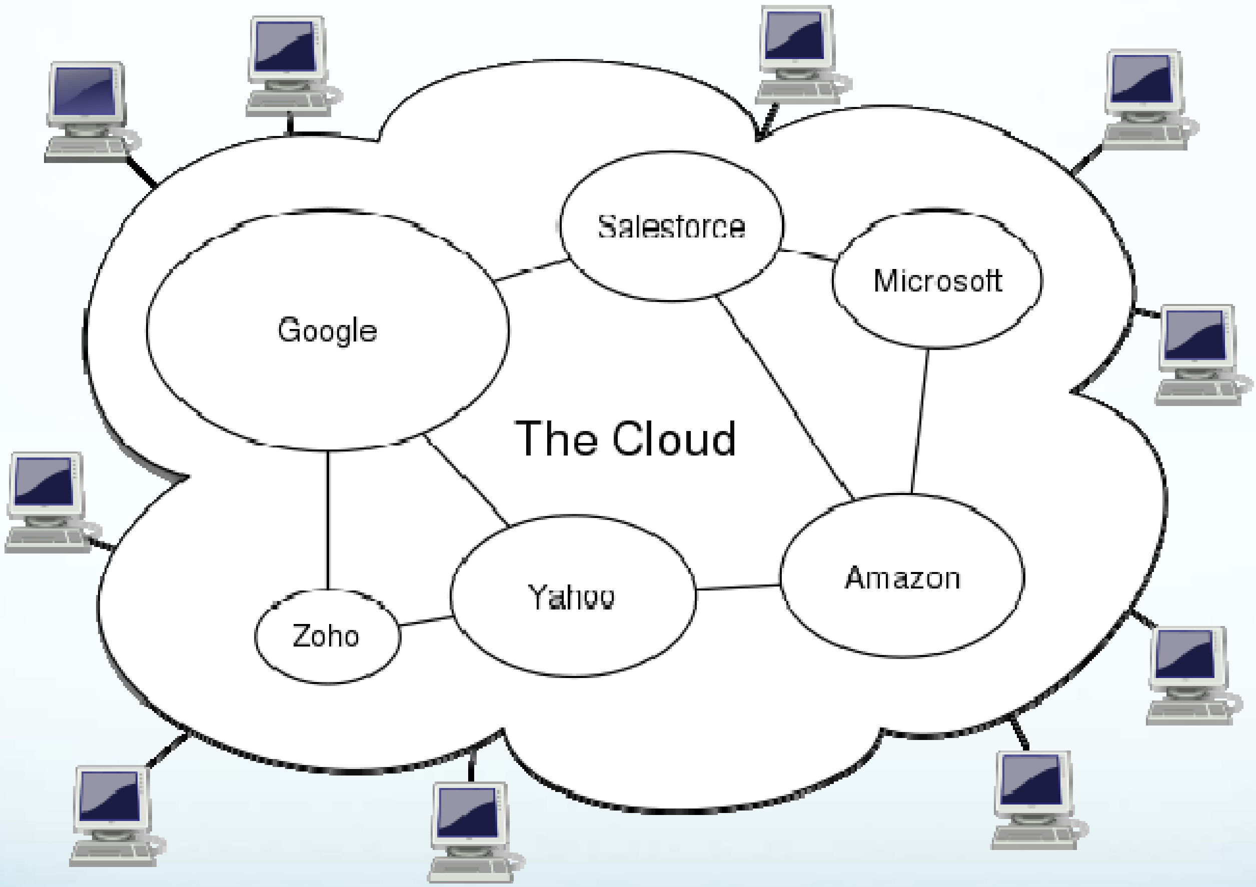
Cloud Computing

Per Wikipedia, ‘the term ‘cloud’ is used as a metaphor for the Internet based on how it is depicted in computer network diagrams. It is an abstraction of the complex infrastructure.’ ‘Common business applications online are accessed from a web browser while the software and data are stored on the servers.’

Working in the Cloud



From Wikipedia: Created by Sam Johnston using OminGroup's OmniGraffle and Inkscape (includes Computer.svg by Sasa Stefanovic) 3 March 2009

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Still, why would we want to work in a cloud?

- Services are accessible over the Internet rather than being stored on individual personal computers.
- Services are updated by the provider.
- Users don't need to purchase or professionally manage the technology infrastructure.
- Key security safeguards are addressed through the infrastructure: data backup, firewall protection, virus protection, id and password protection and audit trail.

What does this mean for our nonprofit?

- Services are updated automatically so your nonprofit stays in sync with related services.
- Services are usually billed periodically so that there aren't major additional investments.
- Users don't need to be technology experts.
- Security is timely and professional.
- Services can be available to more than one user simultaneously.
- Services can be accessed from a variety of locations via the Internet: home, office or field.
- Users can participate in online learning communities and online training.

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Why did RILWP select Salesforce for CRM?

salesforce for Nonprofits

In addition to the general features mentioned:

- The Nonprofit Template is donated for free to qualified nonprofit organizations.
- Each template can accommodate up to ten simultaneous organizational users.
- Salesforce is a prominent provider of CRM services which are constantly improving and expanding.
- Salesforce could be customized, if needed, by consultants to suit our specific needs (such as the Land Trust Tracker).
- Many free or low cost applications are available to supplement Salesforce.

End of Part 1