

Salesforce for Advancement



Optimize Alumni Lifetime Value

Managing today's fundraising programs and capital campaigns, while cultivating lifelong relationships with alumni and supporters, has grown increasingly complex. Many institutions suffer from a lack of staff resources and data locked up in various systems. There is a strong need to consolidate data in one place and automate processes to re-focus staff on strategic programs and report creation.

Enter Salesforce1 for Higher Ed, a set of end-to-end solutions that allow you to connect with constituents in new ways using social, mobile, and cloud technologies. Become a Connected Campus and optimize alumni lifetime value by leveraging Salesforce for Advancement. Salesforce offers solutions that allow you to build enduring relationships, increase fundraising, and report performance results.



Build Enduring Alumni Relationships

Stay current and relevant with alumni by creating events, content, and communications that connect with alumni interests. Connect alumni with prospects, students, and fellow alum for unlimited networking opportunities and to keep strong ties to your school.



Increase Fundraising

Manage the donation cycle from pledge to payment. Use Salesforce to execute multi-channel fundraising campaigns to increase both donor participation and donation size.



Report Performance Results

Provide real-time visibility into progress and productivity metrics to increase accountability. Measure campaign effectiveness and ROI with Salesforce analytics.



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Keep in Touch with Alumni

By having a 360-degree view of your alumni, you are empowering everyone in your institution to connect with your alumni more efficiently.

Engage in Meaningful Conversations

Remain engaged with your alumni through social, web, email and mobile campaigns to maintain the already strong sense of community and foster pride in your school that could translate into donations in the future.

Gift Processing

Driving a state-of-the-art gift processing department requires a system optimized for accuracy and efficiency with clear and effective process management. Gift Processing will be at the center of your fundraising success with built-in validation, auditing of batches, work process flows and triggers, data cleaning tools, and state-of-the-art data integration tools.

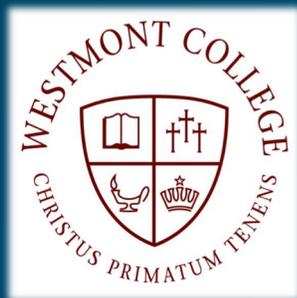
Event Management

With Salesforce, your event team can easily post new events, manage event calendars, track RSVPs, create table seating charts and provide VIP summary reports of attendees. With integrated check-in apps for mobile devices, the latest information and real-time reports are in your hands and your institution's database.

Annual Giving/Appeal Tracking

Annual appeal tracking begins with real-time dashboards and reports that provide your executive team with up-to-date information on the status of your appeals. Build integrated donation landing pages for each appeal and drive reporting with appeal code tracking, build real-time lock box integrations with your financial institution, and drive success with integrated email campaign and event management applications.

Customer Success



Westmont College freed up its IT staff from keeping the lights on for legacy applications to focus on advancement innovation, resulting in a 250% increase in fundraising over 3 years. Gift officers use Salesforce to capture donor notes in real-time, replacing spreadsheets and handwritten notes. Salesforce reports and dashboards provide real-time visibility into fundraising progress and gift officer productivity metrics.