

 salesforce.org

#TheFull360

Transition to Salesforce: A Guide from Our Customers



Introduction

As nonprofits, you are the backbone of positive influence and change. Regardless of your cause area, your work is essential and despite the challenges you face, you continually strive to make our communities more inclusive and equitable. Technology can help you do this more effectively. It can spawn innovation, better deliver on your mission and bring your community together on one platform – giving you [#TheFull360](#) view of their interaction with you.

The four customer trailblazers in this ebook will talk you through their impetus for change and the benefits they saw with a transition to Salesforce. They will be joined by consulting partners who worked on their implementation to give you a full picture of who and what it takes as you consider a technological change.



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What are you asking yourself as you consider a transition?

“Everyone seems to be moving to a digital first strategy, is it time for us too?”

“Salesforce is for really big organizations, I am a small nonprofit — will I see the benefits?”

“I want to move to Salesforce but I have so much legacy data and, honestly, don't know where to start.”

If you've asked yourself these questions – you're thinking about all the right things! We asked these questions to nonprofits who have assessed, evaluated and moved to Salesforce. Here's what they say:

Nonprofit Trailblazers Who Moved to Salesforce



Name: Jeffrey Klein, *he/him/his*

Organization: The Center

Size: Medium

Title: COO

Key Benefit of Salesforce:

Staff and leadership can have a [#TheFull360](#) view of everything happening in the organization's ecosystem.



Name: Andrew Caswell, *he/him/his*

Organization: Canadian Cancer Society (CCS)

Size: Large

Title: CRM Implementation Lead

Key Benefit of Salesforce:

A single organization-wide **Flexible Platform** supports all of our varied operations and can adapt quickly to change.



Name: Ashley Stewart, *she/her/hers*

Organization: Extra Special people (ESP)

Size: Small

Title: Director of Development

Key Benefit of Salesforce:

With Salesforce, there is a strong focus on **Innovation** – I know that the platform will meet us where we want to be.



Names: Katie Caljean, *she/her/hers*
VP, Education & Strategic Engagement

Hilary Chiang, *she/her/hers*
Director of Individual Giving

Organization: Maryland Center for History and Culture

Size: Small

Key Benefit of Salesforce: A supportive, social community of over 20,000 users dedicated to helping each other via the **Power of Us Hub**.



Name: Eugene Lovendusky, *all pronouns welcome*

Organization: The Center

Size: Medium

Title: Individual Giving Coordinator

Key Benefit of Salesforce:

Effective **Reporting** to make stronger decisions with data that is presented in a way that is not complicated.



Canadian Cancer Society

with consulting partner, Heller Consulting

The **Canadian Cancer Society (CCS)** is a national organization spanning 10 provinces across Canada working to unite and inspire all Canadians to take control of cancer. In trusted partnership with donors and volunteers, CCS improves the lives of those affected by cancer through world-class research, transformative advocacy and compassionate support.



Courtesy of Canadian Cancer Society

Canadian Cancer Society

People

Andrew Caswell – National CRM Implementation Lead, Canadian Cancer Society

Grant Newbury – Director, Data, Analytics & Solutions, Canadian Cancer Society

Catherine Moore – Digital Transformation Practice Lead, Heller Consulting

Kaia Swift – Marketing and Business Operations Manager, Heller Consulting

The Challenge

Until 2017, CCS operated as a decentralized organization, with regional operations that all operated independently, with their own datasets.

As they looked to the future, their objectives were to:

Consolidate their scattered data: CCS had data on 22 systems, across seven platforms and thousands of spreadsheets.

Upgrade legacy systems: Platforms dating back to the 90's gave them limited insight and ability to track donors and funders.

Streamline for a restructured org: Develop a new nationwide data model and set of common business processes for the new Canada-wide teams.

Why We Chose Salesforce:

In evaluating several solutions, two things stood out in particular with Salesforce:

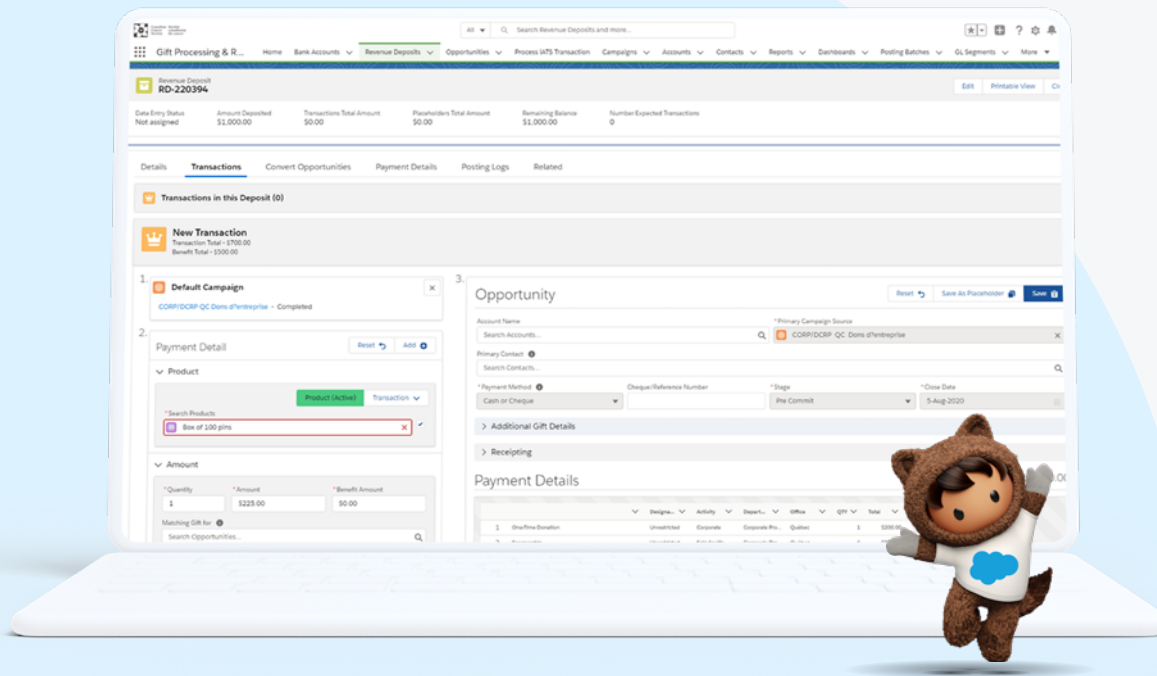
- The NPSP data model and the customization it allowed us
- The unparalleled community of nonprofits on the Power of Us Hub

“During the evaluation phase, Salesforce stood by us as we took the time (almost a year) to understand what would best meet our needs” says Andrew Caswell.

CCS embarked on a 3-year ambitious and successful transformational project in 2018. Andrew attributes this success to the dedicated CCS team working alongside Salesforce and Heller as one team – pivoting, changing course and moving steadily ahead – together.

“Pulling it all together into a single place and seeing our donors as whole human beings that have different ways of interacting with us,” says Caswell, “was game changing.”





Results

- On budget and timely implementation, with a fully bilingual CRM giving CCS one donor and volunteer database across the organization.
- Migration of 118 million records from 22 source databases, along with 18 million contacts to [NPSP](#).
- The customizations in NPSP simplified and streamlined the work of the gift processing team.

“We receive a lot of gifts and we needed to be able to process them all quickly and accurately. The Heller Consulting team worked closely with us to develop a custom gift entry and reconciliation solution. They used an iterative approach to development, with cycles of prototypes, listened to our feedback, optimized both the user experience and the required compliance controls built into the solution. Ultimately, with Salesforce and our consulting partner, we got the right solution for our complex needs.”

Grant Newbury
Director - Data, Analytics & Solutions
Canadian Cancer Society

Consulting Partner

Heller Consulting



By Catharine Moore
Digital Transformation Practice Lead, Heller Consulting

For [Heller Consulting](#), the partnership with the Canadian Cancer Society was a great example of really getting to know the organization and their needs. Here are three key takeaways for other nonprofits looking to embark on a similar journey:

Flexible Platform: Salesforce's flexible platform was invaluable to CCS as we built customizations specific to Canadian receipting requirements.

NPSP comes with so many out-of-the box features but for those of you who want more, there are a range of options for customization and your implementation partner can help you determine the level you need.

Importance of Change Management: CCS invested in change management throughout the project. We were able to help them think through various aspects of how to build in change management within the implementation timeline. This really helped drive user adoption.

Tight Collaboration: We had a really good partnership with both Salesforce and CCS which allowed us to keep communication open and proactively address hurdles brought on by the COVID-19 pandemic.



Courtesy of Canadian Cancer Society

The Center

with consulting partner, Cloud for Good

The Center has been a home and resource hub for the LGBTQ community, NYC residents and visitors since their founding in 1983. They provide a place to connect and engage, find camaraderie and support, and celebrate the vibrancy and growth of the LGBTQ community.



Courtesy of The Center

The Center

People

Jeffrey Klein - COO, The Center

Eugene Lovendusky - Individual Giving Coordinator, The Center

Tal Frankfurt - Founder and CEO, Cloud for Good

Why We Chose Salesforce

In 2017, The Center made a switch to Salesforce using Cloud for Good at their consulting partner. These were the three factors that guided their thinking:

Innovative Systems: The Center is an innovative place and our systems, at the time, were not meeting us where we wanted to go. As you think about a new system, think about how it can support your future direction.

Everyday Efficiency: Our everyday jobs should be as painless as possible. Think about your staff and the headache and inefficiency of their everyday challenges with rigid systems.

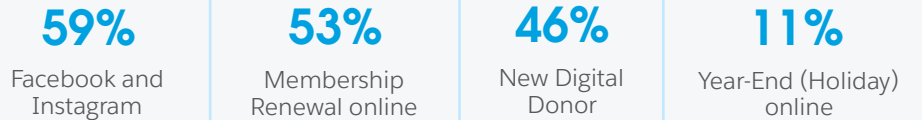
#TheFull360: Finding a system that could give us a 360-degree-view of our community was a true alignment of our mission. Think about the benefit of having a [holistic view of your community](#) – whether someone starts as a client or a donor, a volunteer, you should be able to interact with them in these various roles.



Courtesy of Da Ping Luo

Results

- After canceling in-person fundraising events during the pandemic, The Center’s development team quickly refocused and adapted their fundraising efforts and strategies by leveraging Salesforce and Pardot. Resulting in significant increases across multiple “Digital Buckets” of revenue between FY20 and FY21:



- 20% increase in registrations for the annual Pride event during the first two weeks following the go-live in 2018.
- Dashboards allowed staff to stay connected and on top of work while working from home.
- Case management could be accessed remotely, which minimized service interruptions when COVID hit. Demand for The Center’s services were up 40% during the pandemic, so this was key.

Before

A Day with Salesforce and Eugene

After

With our former system, it was nearly impossible to look up contact information or giving history, or to get a 360 degree view of a constituent.

Reporting was very hard to do. I did not feel comfortable going to my colleague for every time I had a data question.



Eugene Lovendusky
Individual Giving Coordinator
The Center

Reporting is probably the most impactful change for me. I can look at data, discover and report on trends and make decisions that impact how our organization can fundraise better.

With Salesforce, I am empowered. If I need a report of all gifts over \$200, I can easily generate a report with a couple of clicks and it won't be in a spreadsheet – and it will be dynamic and shareable.

My 'Bucket Report': I invented what we colloquially call the "bucket report" which organizes revenue in different buckets based on the channel it came from.

Bucket Report

Report Built on NPSP by Eugene and Cloud for Good

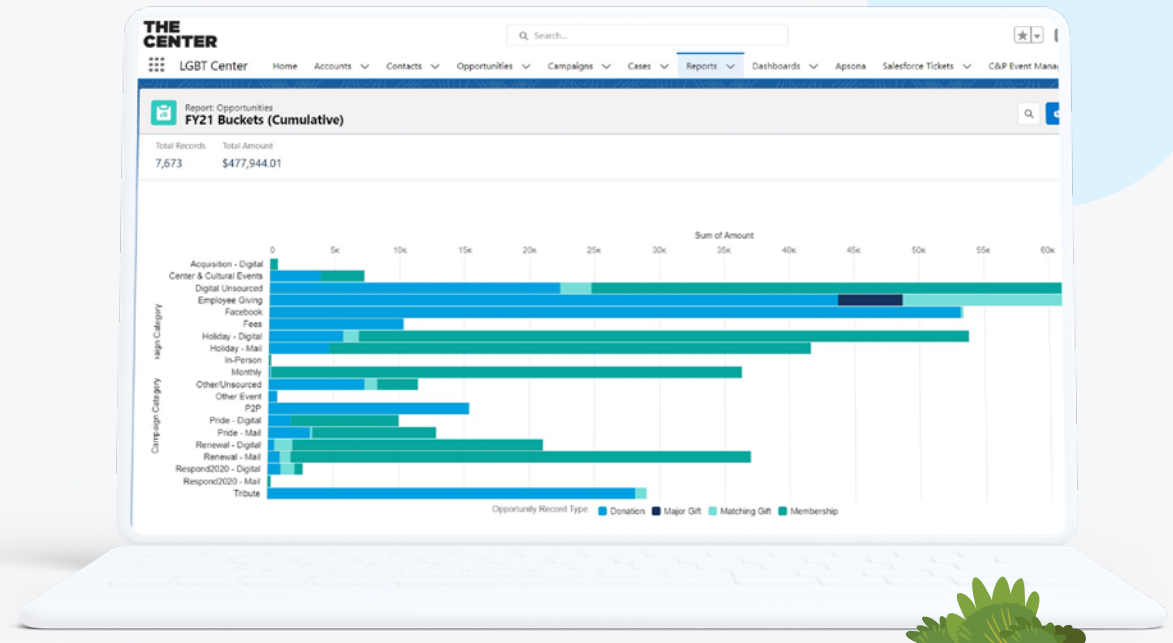
The ability to see specific gifts – like contributions received through a donor’s employee payroll, or an unsolicited digital gift, or even a Facebook donation. This report shows gift volume, subtotals by donation membership, matching gift, or major gift, and how each bucket is changing over time.

What does this report do?

- Gives me a glance into the health of my revenue
- Shows specific gifts, like contributions received through a donor’s employee payroll, or an unsolicited digital gift

How does this report help us?

- It shows me how each of my buckets are changing over time so I can intervene as needed
- Gives key insights on how fundraising methods are performing to help guide our strategy



Consulting Partner

Cloud for Good



By Tal Frankfurt
Founder and CEO, Cloud for Good

Cloud for Good started working with the LGBT Community Center in 2017. The Center had become deeply ingrained in their legacy suite of products – their staff was often forced to adapt to limited usability rather than having the products adapt to their growing needs.

We soon learned that The Center needed a single, secure, and scalable platform. In particular, three facets of this implementation come to mind:

Small Changes With Big Impact: Previously, there was no option for donors to opt to cover the fees associated with credit card transaction processing. With Salesforce, The Center was able to add a check box to raise their donation to cover the small fee directly on the giving pages. This resulted in \$80K additional funds raised in just one year.

Align Your Values and Your Partners: Consistent ground-breaking innovation over a foundation of connectedness represented Salesforce and Cloud for Good, and very much aligned with The Center's values.

Minimize Disruption: Our Migration Accelerator migrated data concurrently with existing operations, allowing us to complete migration in record time.

Cloud for Good Resources

Cloud for Good Migration Accelerator

[Read more](#)

Strengthening Community Through Technology with Salesforce + The Center

[Read more](#)

Your Guide to Migrating from Raiser's Edge to Salesforce

[Read more](#)



Maryland Center for History and Culture

The Maryland Center for History and Culture (MCHC) collects, preserves, and interprets the history, art, and culture of Maryland. By exploring multiple perspectives and sharing national stories through the lens of Maryland, the MCHC inspires critical thinking, creativity, and community.



Courtesy of MCHC

Maryland Center for History and Culture (MCHC)

People

Katie Caljean - Vice President, Education & Strategic Engagement, MCHC

Hilary Chiang - Director of Individual Giving, MCHC

Why We Chose Salesforce

MCHC was using systems that were not able to keep up with the efficiency and scale that staff required. One of the first steps that we took was to understand the functionality of their current systems.

A System that Enables Moves Management: Our systems were not able to measure how supporters and members were engaging with our museum, library, and public programs. We wanted a better way to understand how our audiences were interacting with us so that we could create targeted touch points to engage members purchases and move supporters up the donor ladder.

A Culture of Data that Enables Personalization: We wanted to enable a culture where all staff could access data. Our structure is unique – we have a library, an academic journal and press publications, educational programming, and a museum – we needed to answer questions like – have they been a member for 10 years? Have they just joined as a member because they joined a virtual program and received an email?

Can Smaller Nonprofits Use Salesforce Successfully?

We have a staff of just 37 people – yes, we are a small nonprofit. We have big goals for our organization and we did not want to compromise on our choice of CRM. There might be a notion out there that Salesforce is too much for small nonprofits but the truth is that it allows us the functionality we are looking for and the opportunity to build as we grow without worrying if it will outgrow our needs.

If you are a small nonprofit, our advice to you is to understand the complete functionality of Salesforce. It is a big investment, so do your research and to talk to other nonprofits who have been in your shoes.



Fundraising with NPSP from Salesforce

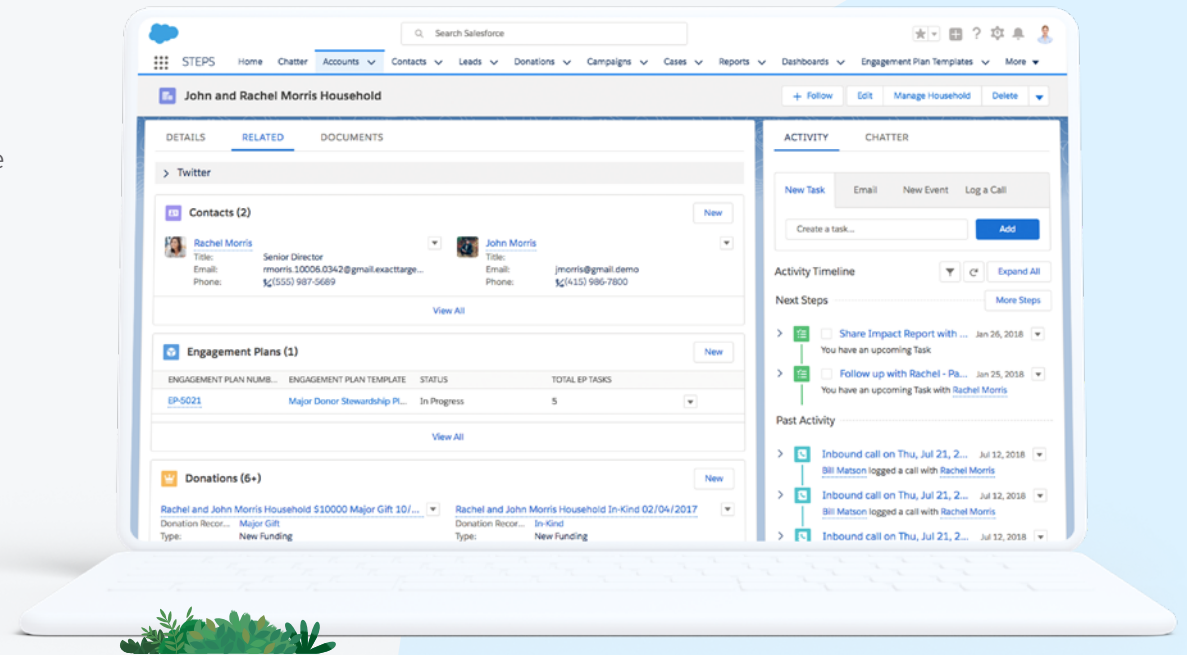
An Easy Solution That is Built for Exactly What Nonprofits Need

[Nonprofit Success Pack \(NPSP\)](#) comes equipped with core tools you can use as a foundation for your fundraising needs. NPSP is versatile enough to support small nonprofits, large NGOs, and every organization in between. Its core tools and data structure support growing organizations and changing missions. Here are some of the core fundraising functions that come with [NPSP](#):

Donation Management: Track all types of donation types – one-time gifts, recurring gifts, matching gifts, in-kind gifts, tribute/honor memorial gifts.

Reporting and Dashboards: Develop lists and reports that you can visualize in dashboards to understand fundraising and program performance. NPSP comes with over 70 constituent and fundraising reports and dashboards.

Constituent Relationship Management: Track volunteers, donors, clients, and board members and more, all in one place.



Your first 10 subscriptions to NPSP are free as part of our Power of Us Program.

[Learn more](#)

Extra Special People

with consulting partner, Arkus

Extra Special People (ESP) creates opportunities for people with disabilities and their families – serving more than 600 participants through various programs.



Courtesy of Extra Special People

Extra Special People



People

Ashley Stewart - Director of Development, ESP

Peter Cates - Recreation and Facilities Coordinator, Development Officer, ESP

Scott Searle - Delivery Team Manager, Arkus

The Challenge:

Inefficient Systems: Our lack of a strong technological infrastructure meant many of our internal processes were manual, taking time away from more meaningful work for our staff.

Scattered Data: As a growing organization, we were adding new technology systems as needs arose, but these systems were not configured to talk to each other. This resulted in a lack of clarity across teams and a scattered supporter experience.

Legacy Systems: Technology we were using in the early days met our needs, but as we grew, we saw a need for more sophisticated platforms to track moves management, data-driven communications, and more.

Why We Chose Salesforce

As we looked into Salesforce, we found solutions that could work across our organization and still sync together. We chose [Accounting Subledger](#), [Case Management](#), [Pardot](#) and the [Nonprofit Success Pack \(NPSP\)](#) to fulfill our current needs but also plan for our growth.

Talking to other nonprofits before you invest in a new CRM is one of the best ways to learn about a system – both the good and bad. Here our mini-guide for migration – things we considered as we made the move:

Get leadership on board: From the very start, we had a member of our Board of Directors serve as an advisor of our steering committee. He sat in on demos with different platforms and would consult with us as we were working through the options. This allowed us to have a voice with someone who had a higher-level stake in steering the organization.

Plan for the future: Ultimately, Salesforce met our vision for our future. CRMs are cumbersome – training staff, creating new protocols and ways of working – so we wanted something that would be able to stay with our organization for the long haul.

Consulting Partner

Arkus



By Scott Searle
Delivery Team Manager, Arkus



By Katharine Atwood
Brand Manager, Arkus

Arkus worked with Extra Special People to realize their vision of a connected nonprofit.

Their vision was to have a single and unified view of their donors, volunteers and grantees. With Salesforce we were able to bring this vision to life with select products and features that met their needs.

While our teams are only a few months in on this implementation, we've started to see the impact of our first phase - the data migration work:

- Emails and calendar events are now automatically captured to the appropriate Contact and Opportunity records using [Einstein Activity Capture](#).
- [NPSP rollups](#) show the ESP team a complete view of donor history for Contacts and Households.
- Within a month of implementation, 1,300 donations and more than \$248,400 have been successfully made through Nonprofit Cloud and the GiveLively integration – all logged accurately in Salesforce.



Courtesy of Extra Special People

Learn more about this implementation by watching this webinar with Arkus and ESP

[View now](#)

The Benefits of Connected Marketing and Fundraising

With the implementation of Pardot and NPSP, Extra Special People have the benefit of getting increased ROI from their marketing efforts.

This is because marketing campaigns may generate buzz, but ROI can remain ambiguous.

On the flip side, fundraising teams get frustrated when marketing campaigns bring them unqualified leads who are not ready to donate. When marketing and fundraising are connected, they have a shared view of constituent data and can easily track the same metrics, which is only possible when they have technology systems that talk to one another in real time.

Learn how you can create extraordinary experiences with Marketing and Engagement Solutions for Nonprofits.

[Learn more](#)



Courtesy of Extra Special People

Nonprofit Resources

Learn

Trailhead Course:

[NPSP Basics](#)

Solution Sheets:

[Nonprofit Cloud for Fundraising Reporting with Salesforce](#)
[Digital-First Fundraising Strategies](#)

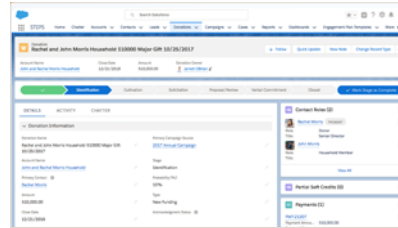
Nonprofit Cloud Solutions:

[Fundraising](#)
[Program Management](#)
[Marketing and Engagement](#)

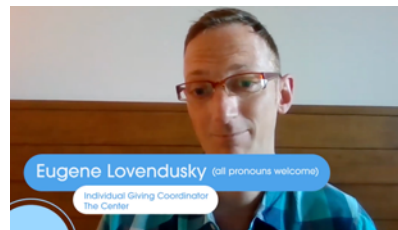
Get NPSP

Your first 10 subscriptions to NPSP are free as part of our [Power of Us Program](#)

Watch



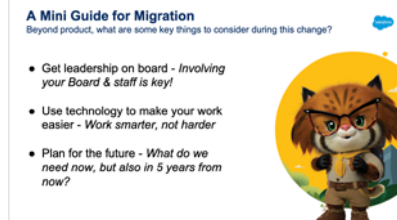
[Nonprofit Marketing and Fundraising Demo](#)



[A Story of The Center's Transition to Salesforce](#)



[Nonprofit Cloud: Deliver Unique Experiences to Drive Impact](#)



[Extra Special People and Arkus Talk Details About Their Transition](#)

