

Introduction to Salesforce for Nonprofits

> Why does a nonprofit need a “sales” database?

If you’ve heard of CRM (customer relationship management) platforms, you may think of them as a tool for business sales teams. Since CRMs became available in the 90s, the business world has latched on to the idea that a sharing information about contacts internally is crucial to success, and Salesforce has become one of the most popular CRM platforms in the business world.

Nonprofits are now finding that a CRM platform like Salesforce can help any organization that is built around people and relationships to track and share contacts internally. And it can even do a whole lot more. At its best, a CRM can allow you to simplify your processes and free your time to focus on your programs.

> Why Salesforce?

Salesforce was the first major CRM to offer the easy accessibility and security of a cloud-based CRM system, and in recent years has built a dedicated focus on the nonprofit sector with Salesforce1 for Nonprofits, the Power of Us Hub, and the Salesforce Foundation.

> The power of Salesforce?

Salesforce is a web-accessible CRM, yes, and it’s also a database where you can store and manage information about your nonprofit’s important contacts – clients, supporters, members, funders, volunteers and more.

- **Highly flexible and easy to use cloud based database platform.**
- **Customizable via Clicks, not code... but you can code.**
- **Began as a sales tool, but has turned into much more.**
- **It’s more than a sales database today. It’s a technology platform.**

**BUT... It’s very deep and can seem overwhelming—especially for nonprofit use.
Enter the Salesforce Nonprofit Starter Pack.**

➤ Salesforce for Nonprofits through the Nonprofit Starter Pack

The Salesforce Foundation offers the optional Nonprofit Starter Pack as a way to customize Salesforce for the specific needs of most nonprofits for donor management. The NPSP is an open source project, meaning that many individual developers share the effort of developing the software.

- **Created and managed by the Salesforce.com Foundation.**
- **Provides donor management via a group of packages on top of the Salesforce.com platform.**
- **Free and available to all nonprofits.**

➤ Beyond the Nonprofit Starter Pack, Salesforce can also help with other common needs

You can extend what you can do with a Salesforce database with customizations and free add-on applications that are tailored to specific nonprofit needs:

- **Volunteer management through the free Volunteers for Salesforce**
- **Auctions through the free Auctions for Salesforce.**
- **Client demographic and tracking through creating custom objects and apps.**
- **New apps are being developed everyday. <https://appexchange.salesforce.com/>**

➤ How nonprofits are using Salesforce

Today nonprofit organizations of all sizes are using Salesforce as much more than a CRM:

- **Human service organizations can use Salesforce to track cases and answer questions quickly.**
- **By tracking the effectiveness of various types of campaigns, nonprofits can use Salesforce to make better decisions about which campaigns to run, and when.**
- **Nonprofits can more easily fulfill reporting requirements of governments and other funders, and better demonstrate their impact to supporters.**

About Database Sherpa

At Database Sherpa, we are more guide than taskmaster, more teacher than consultant. We have met organizations at every point in their trek to database clarity. We know that treating the design and development of your Salesforce database as a journey, and collaborating with an experienced guide, can be transformational for your organization.

Collectively, we bring decades of experience to each project while still meeting each organization where it is. We know the path to a better database, can point out the pitfalls before they become big problems, and will share good practices at every turn. Perhaps most importantly, we believe that missteps and learning are all part of the process... you'll have the freedom to explore without the fear of "failing." So take a deep breath. We know this mountain, and we are ready to help you climb it.

If you have the energy and interest, partnering with a Sherpa is a way to actively engage in the database process and reap unique rewards that come from your own efforts: a completed database, empowered staff, and in-house knowledge that reduces (even eliminates) the need for ongoing consultation.