



Digital-First Recipes for Nonprofit Success

How to Use Technology to Thrive in the New Normal



Let's all take a deep breath in. And release.

Can we agree that 2020 was a year like no other? The challenges we've all faced in our personal and professional lives have forced us to adapt and pivot in so many ways, in real time – from how we socialize to where we work from and how we do our work. And while this past year has delivered so many unknowns, one thing we do know for sure: *For mission-driven organizations like yours, making the shift to a digital-first approach is more important than ever.*

Nonprofits have known for some time about the need to shift toward digital-first models for fundraising, program management and marketing. Donors and constituents are increasingly living digitally-centric lives, and nonprofits have had to pick up speed to meet those fellow humans where they are. The current crisis has only accelerated this shift.

What is a digital-first strategy? It's a mindset that asks, "how can we support and improve this initiative or operation leveraging the power of data and technology?" That could be a large digital transformation around reporting to funders. But it can also be smaller, in how you highly personalize a communication without lifting a finger, automate a repeatable program process, or delight a donor with a perfectly timed thank you.

Before we dive in, we want to pause and say thank you. Thank you for continuing to carry out your missions and charting a course through the chaos. Our nonprofit customers have made impressive pivots, taken big risks, and achieved tremendous results for their communities this year.

We know it hasn't been easy to adapt to changes in the way you raise money, convene and communicate with stakeholders, and execute your work, but one truth that's been underscored this year is that our social ecosystems are fragile, and mission-driven organizations are essential to bolstering us all.

You could be working on health and economic challenges, social justice movements, or local disasters. You could also be a nonprofit where operations are still paused due to the pandemic. Regardless of your cause area, your work is essential. We're here to help you do it in a more effective and efficient way, letting our customer trailblazers lead us through this change throughout this ebook.

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The New (Ab) Normal

Is anything in your organization operating in the same way it was last year at this time?

- You most likely have staff working from home, and you're trying to gauge the best way to *keep teams productive, connected and happy* while they're working apart from each other, often in a distracted environment (hello, remote school).
- How about finances? Maybe revenue slipped, or maybe it surged – either way, you might be struggling to accurately forecast giving in the upcoming fiscal year, and you're thinking of new ways to diversify revenue and *make up for budget shortfalls*.
- How many times has your message evolved this year versus last year? We know it's increasingly challenging to cut through the deluge of notifications on your constituents' phones and inboxes with *highly relevant communications*.
- Speaking of shortfalls, if event revenue was central to your budget, you're probably trying to figure out how to *take events online* and create experiences with just as much impact as your annual gala. Would you like a virtual hug? Because we know that's not easy to figure out.
- And as people are spending more time online than ever, cutting through this clutter to reach donors and prospects requires an agile, dynamic, and personalized strategy.
- And last but far from least, how are you meeting the ever-changing and increasing needs of your communities during this crisis, while ensuring you *hit your program impact goals*?

The quick answer is no – nothing is the same. The challenges have been enormous, but there's also an urgency felt in the sector to overcome these new challenges, creating a push to stay relevant and not only survive, but thrive.

That's what Salesforce and *Nonprofit Cloud* are here for: Our technology is built to support nonprofits in overcoming the challenges you're facing in fundraising, marketing, and program delivery as you evolve into more adaptive, agile, future-proof organizations.

Becoming Future-Proof

Change is the only constant, and it's picking up speed, both within your organization and in the world, every day. This change does not work well with a rigid model for making decisions, a way of working etched in cement, or technology that was built for an office, especially one from 1990 with a server in the closet.

Meeting this moment means you holistically structure your organization with an *eye to agility and resiliency* at every turn to digitally transform your organization for change. It means you can do more with less, and see what's coming at you, using the data you've generated through the course of your work.

Maybe you want to make it easier for staff to move between work-from-home and in the office, using flexible tech as the scaffolding across disciplines – whether finance and fundraising, marketing and engagement, or programs and constituent services.

Or maybe it feels urgent to collect and leverage data to shine a light on your impact; and use those insights to inform decisions at every level – from the way you approach donors to how you allocate resources.

So you're figuring out how to build your work accordingly by ingraining a culture of data-based decision making that is flexible, iterative, and adept at shifting course as needed.



"To stay agile and overcome challenges like the COVID-19 pandemic, nonprofits require strong partnerships and systems across finance, fundraising, marketing, programs, funders, and other teams. Foundational to achieving that trust is data, with a unified, transparent view of your impact, operations, and effectiveness."



ERIC DAYTON

Director of Data Management, buildOn.org

Building a Digital Vision Across Your Whole Team

To build toward a fully digital future, consider the ways that digitizing your mission will affect every facet of your organization. From leadership to programs, finance and donors to volunteers, *Nonprofit Cloud helps you connect all parts of your organization in support of the urgent and imperative shift to a digital model.*

Let's take a quick look at the benefits at every level of your org:



With a single trusted platform, *leadership* can have a 360° view of everything happening in the organization's ecosystem, from staff productivity to what's motivating donors to throughout of your program operations.



Fundraising staff can build effective strategies and donor experiences, sending clear communications with impact in campaigns, while understanding a donor's journey from awareness to advocacy. Fundraisers are more productive with automation of tasks and artificial intelligence across devices to help them connect.



Marketing teams can speed up the pace of that journey by designing multi-channel, streamlined communications based on constituent personas. Good data integrated to world-class marketing technology makes that possible!



Program teams can scale their impact with workstream automation, and use data to better serve their constituents in more personal and empathetic ways. Imagine being able to adapt to constituent needs as those needs shift and change in real time – with our tools, it's possible.



For *staff* overall, a unified source of data and information helps to break down silos within the organization, enabling smooth collaboration, communication, and productivity among staff on all teams.

Shared Recipes for Digital Success

Nonprofits run the gamut in terms of size, budget, and mission. And though they all share an urgent desire to change the world, why and how they engage with donors and constituents is not a one-size fits all situation.

[Nonprofit Cloud](#) and its suite of tools empowers teams to unite behind finding and engaging today's digital stakeholders – from supporter to beneficiary – and delivering experiences that surpasses their expectations, whether they're a major donor or a casual supporter. Our integrated technology allows orgs of all sizes and scopes to apply a holistically digital, data-driven approach to change.

The next few sections will show you how other nonprofits have taken the steps to digitize their missions – we hope they inspire you to do the same.

In a way, it's kind of like following a recipe. If you can visualize the outcome you want, you can use a mix of ingredients and a set of steps to move you toward that outcome. And once you have the fundamentals down, you can flex, tweak, and adapt the process to make it your own.

Below are 7 examples of recipes, where real nonprofits leveraged the right ingredients and instructions to deliver new digital-first outcomes.

- [Knowing and Segmenting Donors](#)
featuring Atlanta Mission
- [Good Clean Fundraising Data](#)
Robin Hood
- [Virtualizing Events and Services](#)
Gigi's Playhouse, Boston Partners in Education, Farm Aid
- [Communication & Supporter Journeys](#)
Common Sense Media
- [Bringing Client Services Online](#)
The Healthier Kids Foundation
- [Working Smarter with a Distributed Staff](#)
buildOn
- [The Transparency Imperative](#)
The Jewish Federation of Atlanta



Knowing and Segmenting Donors

featuring Atlanta Mission



Why Knowing Supporters Is So Critical

Donors don't just want to be a funding mechanism, they want to be fully integrated with your organization, and properly acknowledged for their support. Knowing your supporters requires the [good data](#), which in turn requires an integrated set of technology and a way to segment people accordingly.

Atlanta Mission Knows Their Supporters

[Atlanta Mission](#) empowers people experiencing homelessness in Atlanta. Founded during the Great Depression, the organization is the longest-running provider of services to homeless men, women, and children in the city. Their digital transformation began when they started using the [Nonprofit Success Pack \(NPSP\)](#) as the foundation of all of their operations, from constituent services to fundraising.

Before the switch to Salesforce, Atlanta Mission relied heavily on direct mail to connect with their donors. Not only was the volume of mail expensive and an inefficient use of funds, they were relying on the same set of messages for every donor and prospect. As they evolved, Atlanta Mission realized they needed to personalize their outreach to donors, making the shift from transactional interactions to relational ones.

Staff members James Barrell and Bonnie Beauchamp relied on a set of surveys to get to know their donors and prospects better, then designed six audience personas based on that data. From there, they began designing empathetic donor journeys that culled data insights to create personalized outreach. Beauchamp automated those journeys via email using the [Nonprofit Success Pack](#) to capture donor data, [Pardot Lists & Engagement Studio](#) to segment and communicate with donors. This freed

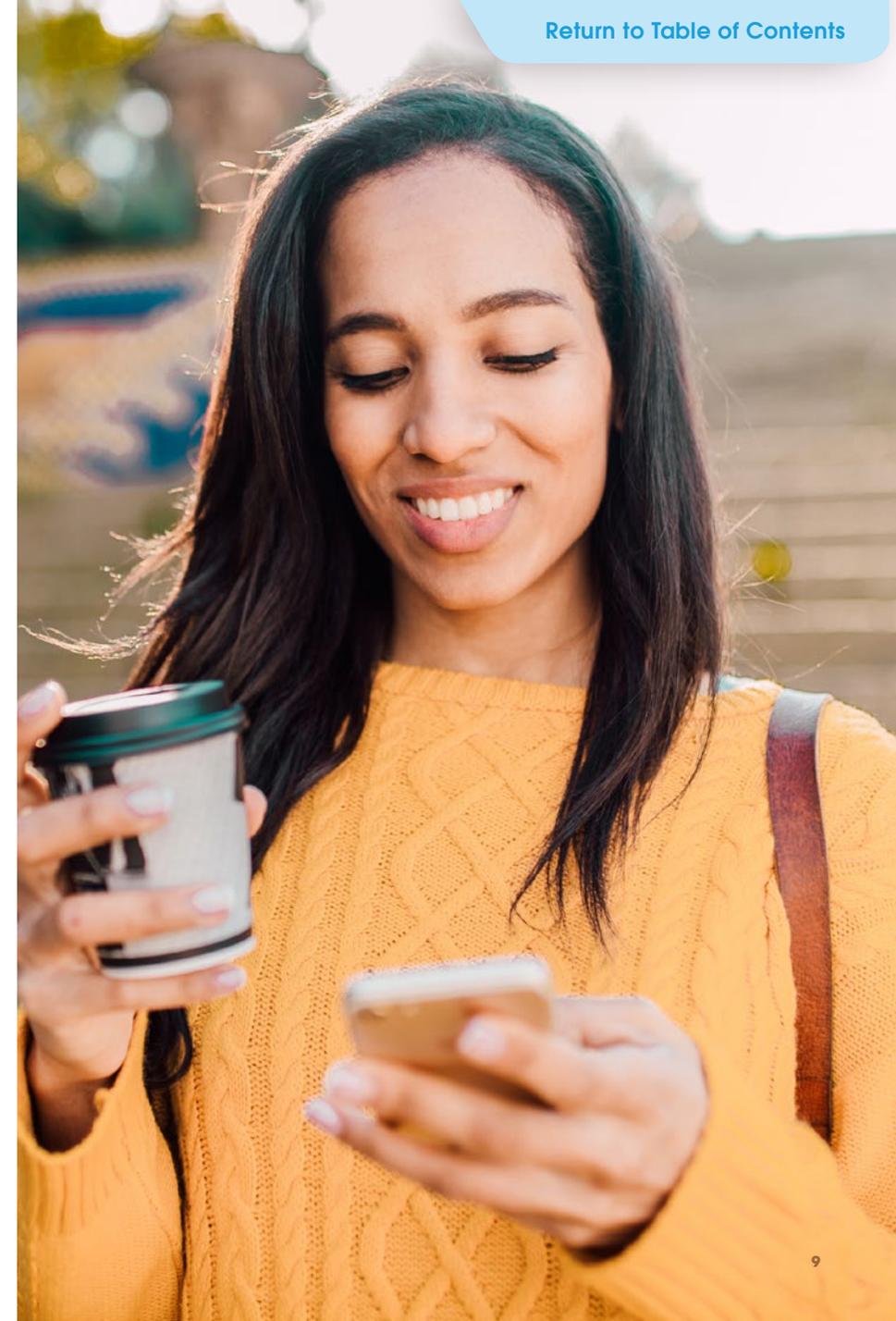
up precious staff time and significantly increased revenue growth. Donors became energized and engaged on a whole new level.

Sounds, well – transformative, doesn't it? Guess what? It's totally do-able. With the right combination of ingredients and a roadmap for getting it done, your organization can chart your course into a digital-first mindset and find and engage supporters for life.

Only 26% of fundraising professionals say they have good data in their Customer Relationship Management (CRM) system according to the [2019 Fundraising Productivity Report](#).



Note: Atlanta Mission's vision for digital transformation actually started with constituent services. Installing [Nonprofit Success Pack](#) as the foundation for its programs, Atlanta Mission was able to realize its vision for transformational, individualized client care and create a central repository for clients and programs.



RECIPE

Knowing and Segmenting Donors

People – Depending on your size, you might need more or less people involved.

- Tech Leader – *James Barrell, Chief Information Officer*
- CRM Admin – *Heather Webster, CRM specialist*
- Marketing – *Bonnie Beauchamp, creative and digital manager*
- Fundraising leadership and teams

Partners – Depending on your budget, you may do some of this inhouse.

- Marketing agency for research persona & journey work
- Consulting partner for [NPSP](#) & Pardot

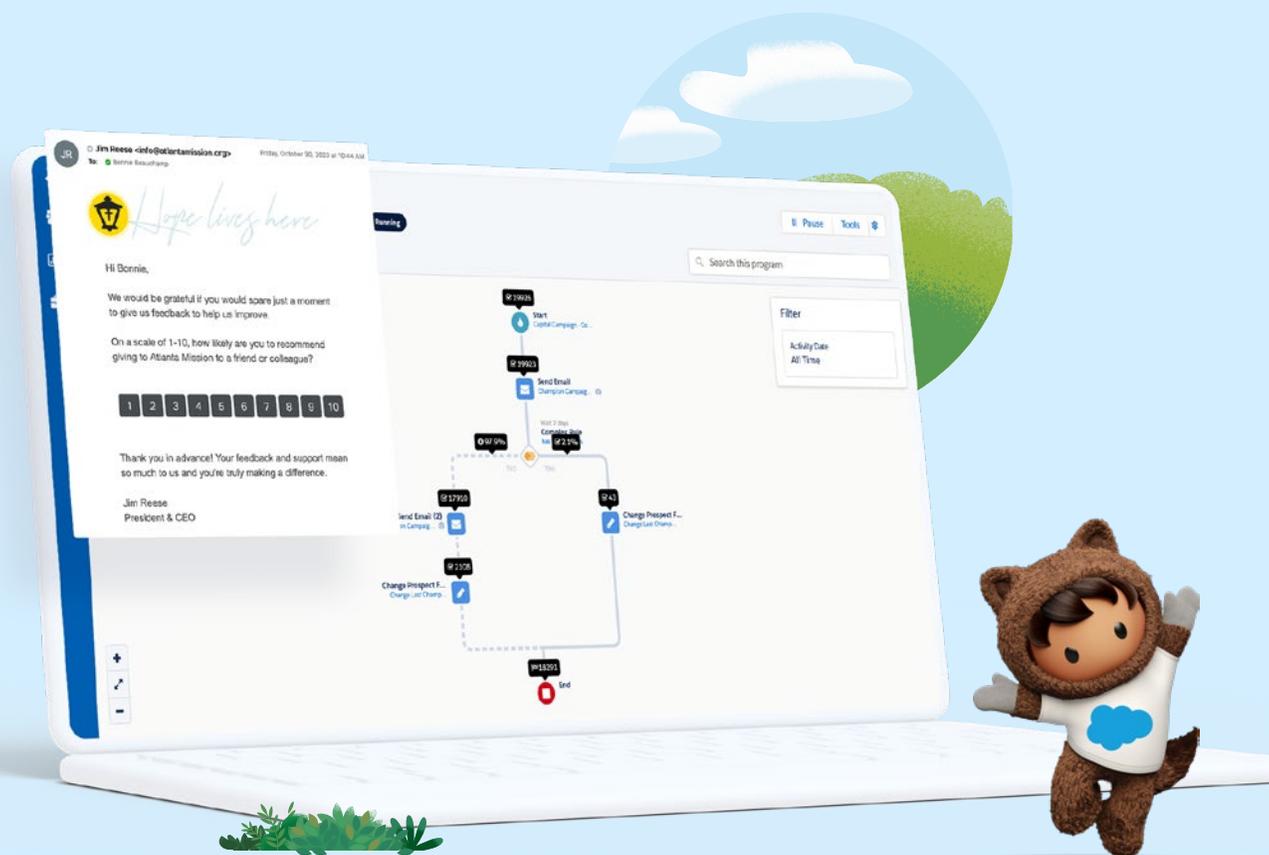
Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – One integrated platform and CRM for nonprofits to transform digitally. [Households, Customized Rollups & Levels](#) unify household data and rolls up data.
- [Pardot or Marketing Cloud](#) – Create progressive forms to capture data. Lists to listen to digital actions, capture data on supporters, and segment audiences.
- [Wealth Engine](#) + [Wealth Screening Apps](#) – Propensity to give data
- [Classy](#) or [Online Donation Apps](#) / [Elevate](#).

Steps

1. Atlanta Mission's first stepped back, and started defining their personas, their journeys, and where they could improve the experience.
2. Their first audience was segmenting major donors, and assigning individual gift officers to cultivate relationships with each of the segments.
3. Barrell ensured [NPSP](#) captured all the data on donors, levels helped segment supporters based on their giving history, and they leveraged propensity to give from [WealthEngine](#).
4. Next, Beauchamp used Pardot to design and map out a variety of engagement studio campaigns based on the individual's interests and actions. Customized campaign communications include transformational stories, first hand needs, events, and more.
5. These communications drove supporters to specific actions, such as a specific [Classy](#) page for Online Donations for mid-level donors, or a survey to find out if they were a “champion” or net promoter of their mission.
6. Once the tech was implemented and the strategies were underway, Atlanta Mission was able to have a 360° view of their constituents and how they were interacting with the organization's mission.





Results

- Before using [NPSP](#) and Pardot, building a donation page and emails for a single campaign could take *4 to 12 hours* of staff time. It now takes minutes, saving precious time and allowing them to accomplish big goals with a small team.
- They've seen *double digit growth* in their major donor fundraising and over 50% growth with our digital donors.
- This year marked Atlanta Mission's biggest operating revenue generating year in our organization's 83-year history.
- The new marketing systems resulted in *37% revenue growth* year over year since implementing the new tools and strategies.
- Automations in data cleanup have saved the organization *\$10,000 annually*.

Resources:

[Segmentation, Cultivation and Stewardship of Donors](#)

[Atlanta Mission's digital transformation story](#)

[Atlanta Mission How-To: How to Automate Moments of Delight for the Digital Donor](#)

[Trailhead: Constituent Data Management with **Nonprofit Success Pack**](#)

[Trailhead: Engagement Plans and Levels in **Nonprofit Success Pack**](#)

Good Clean Fundraising Data

featuring Robin Hood



Everything Flows From Data

As the push into a digital-first world speeds up, organizations are learning to pivot in new directions and pick up the pace of their own digital transformation. Capturing clean data about your constituents is crucial to that shift – it's the foundation of, well, everything an organization cares about.

Robin Hood Runs on Clean Data

For over 30 years, Robin Hood has been lifting New Yorkers out of poverty by partnering with organizations across the city's five boroughs to support food, shelter, education, legal services, workforce development and more to New York's most vulnerable residents. They rely on clean data to fuel donor-centric experiences that enable giving at all levels – from small donors to transformational gifts.

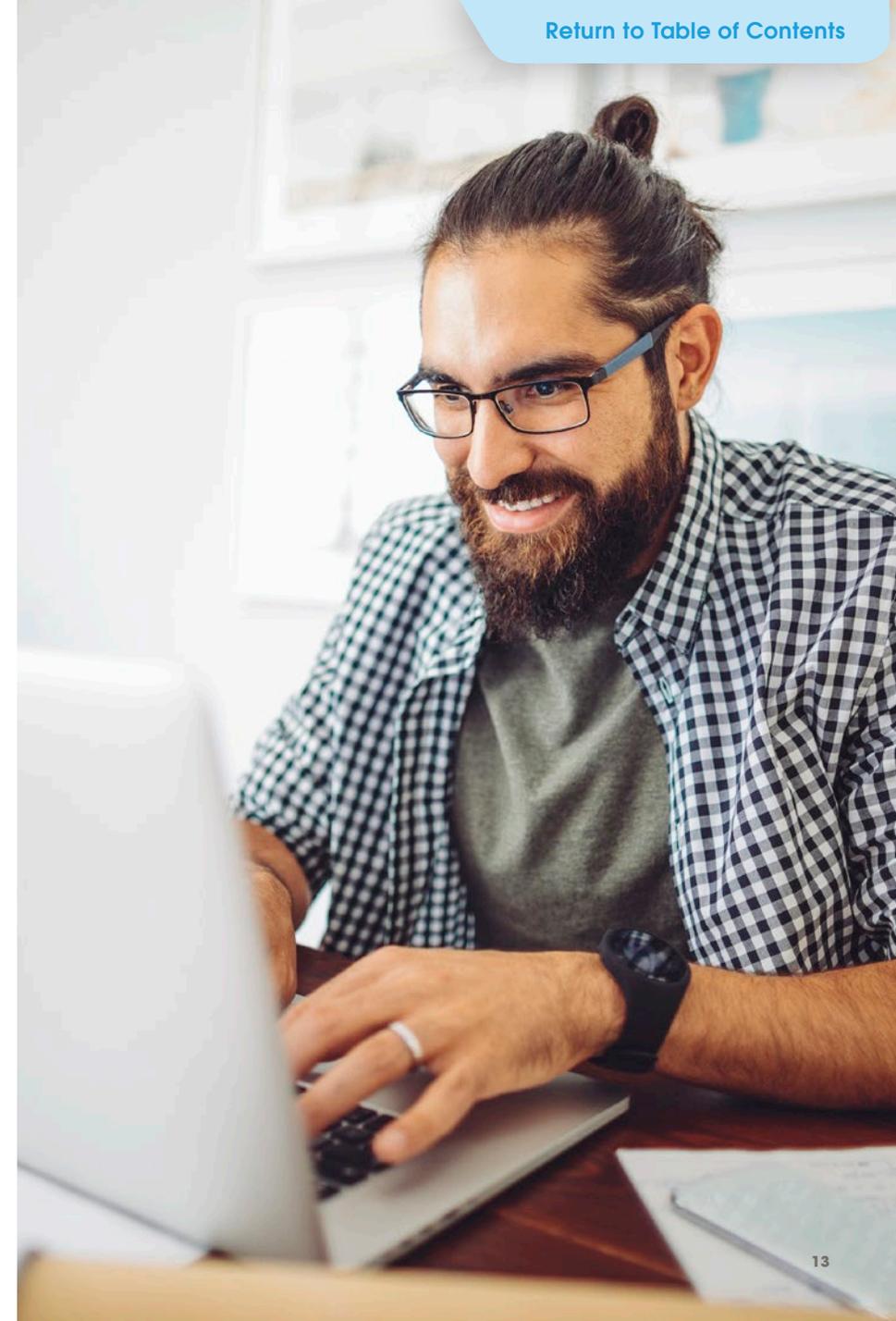
“Data means everything to us,” says database administrator Hao Lu. “All decisions that we make are premised on the data we have.” For example, having an accurate snapshot of a donor's giving history allows Robin Hood's fundraising staff to create the most personalized experience possible when returning to those donors for end-of-year appeals.

And since data is so central to their operations, Robin Hood staff are super-focused on keeping it clean and robust to reduce operational inefficiencies. Lu works on building good data hygiene habits among staff when they enter new records into the database, and a recent installation of the [Insights Platform Data Integrity](#) helps them speed up the process for finding and purging duplicate records in their system.

When the org is built on the cleanest and most comprehensive information possible, says Lu, it enables fundraising staff to build stronger, more trusting relationships with donors. And it lets you shift strategies nimbly when something like a global pandemic throws a wrench in your ability to carry out your mission.

Earlier this year, Covid forced Robin Hood to hold their first digital gala in their 30-year history. It included a special virtual benefit appeal to raise money for a fund to help New Yorkers hardest hit by Covid – their data told them that their supporters were motivated to give in this way. They were right – that night they raised \$115,000,000.

47% of nonprofits are substantially or extremely challenged in capturing and managing accurate data on constituents, according to the [2020 Nonprofit Trends Report, 2nd Edition](#).



RECIPE

Good Clean Fundraising Data

People

- Database Administrator – *Hao Lu, Database administrator*
- Chief Advancement Officer – *Sheila Kelly, Chief Advancement Officer*
- Development Team

Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – One integrated platform and CRM for nonprofits to transform digitally. Batch Data Import of data from offline sources
- Salesforce AppExchange – Integration with 3rd Party Systems
- Salesforce Platform & Lightning UX – Data validation and required fields
- [Insights Platform Data Integrity](#) – Address Standardization, connecting to a National Change of Address database, dedupe and merge capabilities.

Steps

1. Although Robin Hood has long been data-driven, Hao implemented [Insights Platform Data Integrity](#) in a matter of hours
2. He was quickly able to identify 10x duplicates by scheduling regular duplicate jobs to scan the ENTIRE system and flag duplicates
3. He could then identify parent data and merge using the native Contact Merge feature to unify records and all related data, and purge duplicate records, ensuring a better donor experience (and no double sends!).
4. The fundraising team used the data to look at donor's giving history to accurately forecast and predict giving for the upcoming year.
5. Hyper-segmentation allowed development teams to personalize their outreach to donors and connect with them more effectively, boosting giving to record-setting levels in 2020.



Results

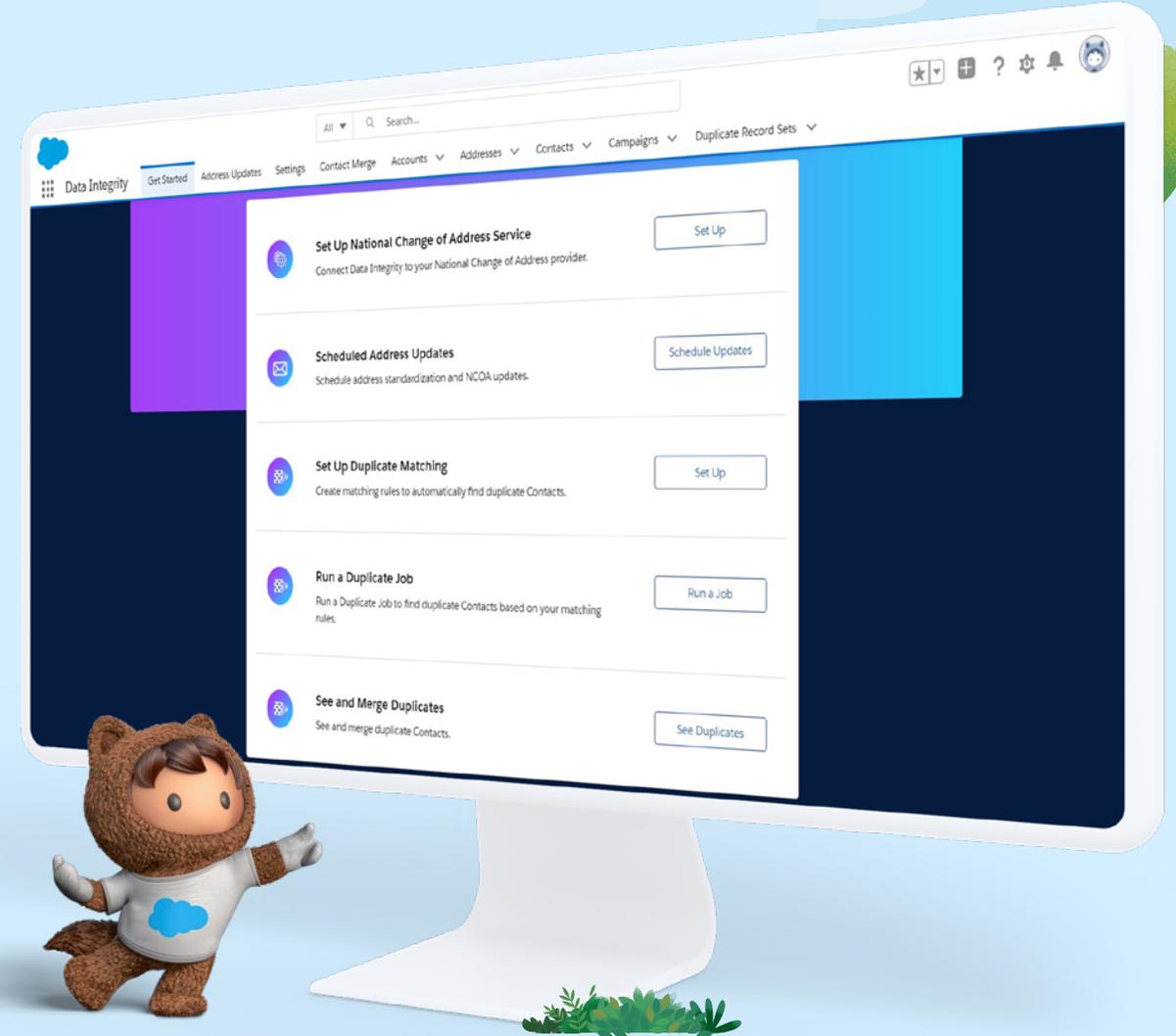
- Using [Insights Platform Data Integrity](#), staff were able to find *10x* the number of dupes than they would have using basic duplicate management tools.
- Insights saves staff hours and valuable time by automating previously manual tasks like updating and correcting addresses.
- They grew from 35K donors to 100K donors in one year and raised *\$115,000,000* in their first online gala in the organization's history.

Resources:

[Clean Data & Supporter Journeys for End of Year Giving](#)

[Insights Data Integrity Snapshot](#)

[Trailhead: **Nonprofit Success Pack** Health and Optimization](#)



Virtualizing Fundraising Events

featuring Boston Partners for Education,
Gigi's Playhouse and Farm Aid



Going Digital With Events Can Be Transformational

If your organization relies on revenue from live events for a big chunk of the budget, 2020 was quite a year. In February, you were likely putting the finishing touches of the year's event calendar, getting ready to host a gathering, or assessing your 2020 budget against projections you'd made with last year's data. By March, if you were like some of our customers, you were working overtime to figure out how to pivot away from in-person gatherings due to Covid.

65% of respondents said they had to accelerate their move to digital events or programs. according to Salesforce.org's [3rd Edition of the Nonprofit Trends Report](#).

Boston Partners for Education was in that position with their Gala. They are a hyper-local organization supporting Boston Public School students. Half of their budget comes from their annual Big Cheese Reads gala, which was eight weeks away when the quarantine began. The team had to move quickly to assess their options and decide what to do. They took their event online using a platform called [Traction Gather](#) [built on [Salesforce Experience Cloud](#)], which they chose because it "gave the feel of an in-person gala-style event," says Andy Kall, the development manager at BPE. The night-of experience was seamless, says Kall, and the organization surpassed their fundraising goals for the night, raising close to \$500,000.

Gigi's Playhouse, a chapter-based organization that runs achievement centers around the country for people with Down's Syndrome, was in a similar situation. With about 50% of their revenue coming from events (the main models being galas and road races) around the country, financially, they couldn't cancel these major sources of revenue. So they pivoted, encouraging their chapters to hold full-scale experiential online galas using [OneCause](#) for donations and auctions. The online galas hit their original fundraising goals and had more reach online than they would have with an in-person event. Their results far

surpassed their expectations, raising almost as much as the in person event, reaching new audiences, at far less cost.

Gigi's Playhouse also had a virtual road race challenge, connecting with [OneCause](#) for Peer2Peer, tools for streaming like StreamYard and Facebook Live, along with Strava to track steps. This blew the audience away, with 100,000 people participating and over \$1 million raised.

Farm Aid is an organization that works to build a vibrant, family farm-centered system of agriculture in America and is known for their annual music festival every fall. Right before the quarantine, they were preparing to host a smaller food and music event on co-founder Willie Nelson's ranch. While they cancelled parts of that event, they also worked with their partners on streaming a live concert broadcasted from all of the different artists' homes.

From there, they decided to hold their own live online event, At Home with Farm Aid, with a call to action to support farmers and ranchers impacted by Covid. Integrating the concert, livestreamed on FarmAid.org, YouTube and AXSTV, with [Classy](#) fundraising pages and Pledgeling for text-based donations, they raised \$500,000 from that event, from all 50 states and 16 countries – with 95% of the gifts from first-time donors.



RECIPE

Virtualizing Fundraising Events

People

- Board members
- Artists and management
- Fundraising teams
- Marketing & events teams
- IT staff

Partners

- Marketing agency for research persona & journey work
- Consulting partner for NPSP & Pardot

Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – One integrated platform and CRM for nonprofits to transform digitally; allows for comprehensive and unified data collection
- Integrated peer to peer digital fundraising tools like One Cause or [Classy](#)
- Traction Gather – Online event platform part of Salesforce Communities
- [Marketing Cloud](#), [Social Studio](#) & [Ad Studio](#) – Multi-channel marketing communications
- Pledgeling – Text-based fundraising app, integrates with SF

Steps

1. All three organizations had to make assessments on a quick timeline to decide how to pivot their fundraising events.
2. For Boston Partners in Ed, communication with stakeholders was crucial – from board members to supporters – “we didn’t know all the answers and that was ok, but we needed to communicate with people to let them know we were working on a solution,” says Kall.
3. The choice of online event experiences was also critical – each organization had to find apps that suited their needs for a live-stream event – from Facebook Premiere (Gigi’s), Youtube, and AXS TV (Farm Aid), and [Traction Gather](#) (Boston Partners in Education).
4. Development managers worked to integrate the platform with their existing Salesforce database, and with other fundraising tools for peer-to-peer and text-based fundraising.
5. Everyone practiced with the new tech and the run-of-show for a smooth event night-of.





Results

- Farm Aid raised **\$500,000** from their Farm Aid at Home event – 95% of the gifts were from first-time donors; 80% of those donors were already on Farm Aid’s mailing list. They also saw a higher per-gift amount.
- All of the Gigi’s chapters that held full galas online met or came close to their fundraising goals of raising **\$70K for each gala**.
- Gigi’s races also met their fundraising goals, and saw engagement from whole new audiences of potential supporters (their challenge on Strava logged **1 billion** steps).
- Boston Partners in Education surpassed their fundraising goal of **\$450,000**, and brought new partners on board for future support.

Resources:

[Webinar on Bringing Fundraising Events Online](#)

[Blog Post: Transitioning Offline Events to Online Experiences](#)

[Story About Boston Partners in Education’s Gala Experience](#)

[Trailhead: Marketing Cloud Basics](#)

Communications & Supporter Journeys

featuring [Common Sense Media](#)



Meeting People Where They Are

On one person's phone, there are countless ways to connect. People's digital lives force nonprofits to operate in an always evolving and fragmented landscape of tools, and the avalanche of information available to anyone means that non-profits must be smart and strategic about how they get their messages through to the people who care about their cause.

Common Sense Media Maximizes and Personalizes Their Data

In 2020, Common Sense Media, which helps families and educators navigate today's digital media landscape for children, was already a digitally mature organization. But it was a journey to get there, says membership director Paul Holman-Kursky.

With a site for families, one for educators, and one housing their advocacy work, "it's like we have three different nonprofits," and before implementing Salesforce a few years ago, there was no unified view of their constituents.

With data about supporters coming into the organization from a number of different channels, it was hard to know with accuracy how many supporters they had, and what exactly those supporters were interested in. Since starting with Salesforce, the staff has made a big effort to centralize and standardize the data that comes in, "so we can make better use of it," says Holman-Kursky.

They unified their data with Salesforce, and started using Social Studio to standardize their social media efforts and [Marketing Cloud](#) to further segment audiences and automate email journeys based on what information people clicked on in their newsletters. When Covid-19 hit, they were well positioned to accelerate their marketing efforts by sending dynamic content to well-segmented audiences.

At the beginning of the pandemic, relevance was a key priority, as was speed. The team knew they needed to respond to the crisis quickly with content that was of the moment, says Holman-Kursky. This intense time (especially for their audiences) forced them to rethink how they communicated, how to be more efficient with dynamic content, and how to make the most of all of their channels, he says.

"We quickly asked ourselves, what questions are we seeing out there, and then we looked at what resources we had that aligned with this moment specifically," says Holman-Kursky. Segmentation was extra-important, he says, because it felt critical that people got the information that they needed. "I don't want anyone to be overwhelmed by finding our information online," he says.

Common Sense's editorial team switched exclusively to creating content that was relevant to the moment – designed to help parents and families as well as educators through the uncertainty in the early days of the pandemic. In late March 2020, they launched a new site called Wide Open School, with their audience's needs in mind.

Audience feedback was a key metric, says Holman-Kursky – and they were blown away by the reviews and notes of appreciation they received as a result of their targeted efforts.



Less than one-third of marketers measure specific metrics, such as email deliverability, social influence, or marketing conversion according to the [2020 Nonprofit Trends Report, 2nd Edition](#).

RECIPE

Communications & Supporter Journeys

People

- Marketing Leader
- Marketing Staff
- Salesforce Solutions Architect
- CRM Manager
- Membership Director (optional)

Partners

- Marketing agency for research persona & journey work
- Consulting partner for NPSP & Pardot

Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – One integrated platform and CRM for nonprofits to transform digitally; allows for comprehensive and unified data collection
- [Marketing Cloud](#) – Multi-channel marketing communications
- [Journey Builder](#) – Deliver cross-channel personalized experiences at every step of the constituent journey with campaign management.
- [Social Studio](#) – Listen, publish, and engage to create advocates. Connect social to marketing, and service in one platform powered by AI.

Steps

1. The Common Sense team implemented NPSP to unify their data and obtain a single source of truth with which to make their decisions.
2. With accurate data that could be updated in real time, the team started using [Marketing Cloud](#) to help segment out their constituents and deliver content that was aligned to their supporters' specific backgrounds and interests. He was quickly able to identify 10x more duplicates by scheduling regular duplicate jobs to scan the ENTIRE system and flag duplicates.
3. They turned to Social Studio to plan and assess social media efforts across their different social platforms.
4. That segmentation turned into hyper-segmentation during the pandemic, as the organization took new steps in automating empathetic supporter journeys designed to support families and educators in a time of upheaval.

Results

- With the use of Social Studio, average monthly social impressions *increased by almost 60%* and total followers increased by 16%.
- Hyper-targeted emails created in [Marketing Cloud](#) have open rates of 30% and higher, with clickthrough rates at around 10%.
- During their pandemic efforts, the team looked to positive audience sentiment as a key metric, and they were blown away from educators and families who were deeply grateful for their efforts.

Resources:

[Common Sense Media's Customer Story](#)

[Podcast: Common Sense's Holman-Kursky talks about Covid pivots](#)

Common Sense Media's [Dreamforce Presentation Recording](#)

[Trailhead: Engage Constituents with Nonprofit Cloud](#)



Work Smarter With a Distributed Staff

featuring buildOn



Virtual Doesn't Mean Less Cohesive

One of the biggest challenges for employers this year has been adapting to having staff work at home. Keeping teams productive and focused while often in distracted environments – and apart from each other – requires a shift in mindset as well as fluency in the skills and tools needed to successfully manage a remote team and their work.

buildOn Had a Head Start

For buildOn, 2020 wasn't a major shift in terms of having a distributed staff. Although based in Connecticut, buildOn has regional offices across the U.S. and staff in the eight countries they serve. Their mission is to break the cycle of poverty, illiteracy, and low expectations through service and education. They make it happen with service learning programs in underserved school communities in the United States, and by building schools in some of the world's most economically disadvantaged countries.

In the past few years, buildOn has been focused on digitizing their mission with an eye to transparency and collaboration across the organization, and they've been gradually building up their suite of Salesforce tools to connect their teams and collect and analyze the data they need to boost their productivity.

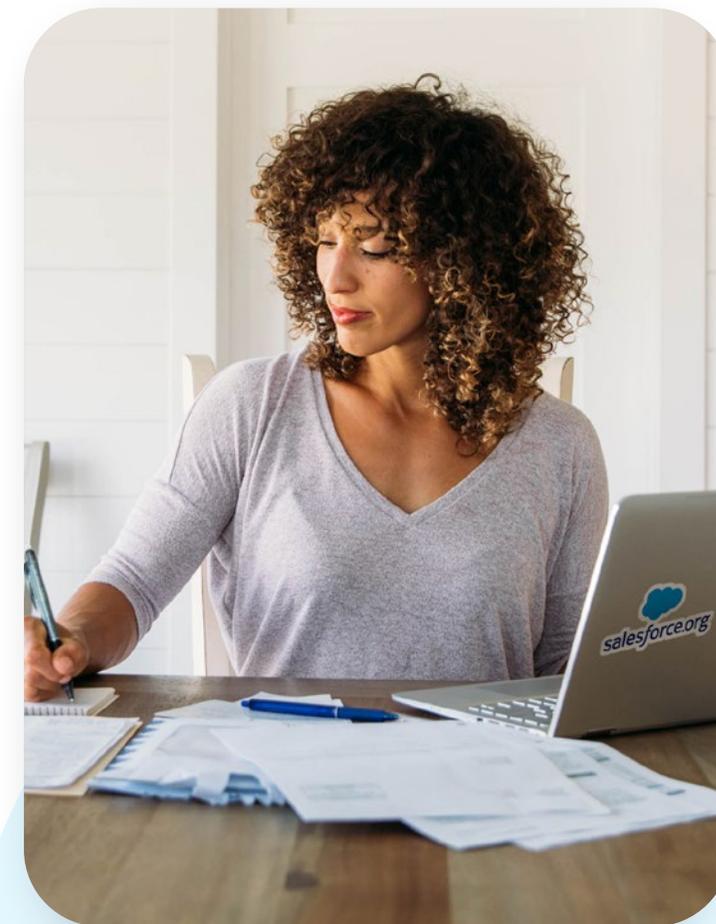
"We were able to hit 2020 more productively than most [other nonprofits]," explains data director Eric Dayton, because of the ongoing work they've been doing to digitally transform the organization. This year gave office staff a rare opportunity to slow down (all of their in-person programs were paused), which Dayton saw as a chance to further build the data culture in the organization. "2020 has given us the time, space, and focus to learn some of these new technologies," he says, even for staff who have been resistant in the past.

One of the things he's most excited about is getting buy-in from development staff to have more consistency working from home using Salesforce Anywhere, Tableau and Einstein Activity Capture to inform their approach to fundraising. These tools, he explains, allow staff to capture and analyze historical data in a way that allows staff to see their impact, and focus on the activity that brings the most traction, says Dayton.

"We're building not just a team of short-order cooks where people go through a set of tasks, but chefs," who can think for themselves how the different ingredients and methods work together. "I'm not going to tell you what to do, but here are the tools, here's the data, I'd love to see what you can create."

They also had been prepared in automating program data collection with Artificial Intelligence. This winter they launched a pilot of Einstein Bots, built for texting and WhatsApp, with staff in Malawi to manage data collection and reporting in the field there.

Because mobile is ubiquitous in Africa but wireless connectivity is not, the bots are an upgrade from formerly paper-and-spreadsheet-based reporting systems, and fit seamlessly into tech that was already used by staff. "Now we have real-time data coming from every single community we work with in Malawi," says Dayton.



68% of nonprofits said they have invested more in technology to help employees to work from home according to Salesforce.org's [3rd Edition of the Nonprofit Trends Report](#).

RECIPE

Work Smarter With a Distributed Staff

People

- Leadership for buy-in
- IT staff to implement and train
- Development staff to interpret for their own use
- Programs staff for data collection and bots

Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – One integrated platform and CRM for nonprofits to transform digitally; allows for comprehensive and unified data collection
- Salesforce Anywhere – Collaboration “canvas” with data and spreadsheets for prospect research and moves management
- [DonorSearch](#) – Wealth Screening & Propensity to Give Data
- Salesforce Inbox – Inbox Integration for communications and activity capture
- Einstein Chat Bots – Program conversations with staff or stakeholders anywhere
- Tableau – Data visualization and analysis

Steps

1. Years of use of [NPSP](#) and Pardot put buildOn in a good position at the beginning of 2020, with a robust data culture and a layered suite of Salesforce tools.
2. This winter, they piloted Einstein chatbots as a way to collect data from staff and programs in Malawi.
3. With programs paused in 2020, staff got the chance to train up on new tools like Tableau and Einstein Analytics for data visualization and analysis.



Results

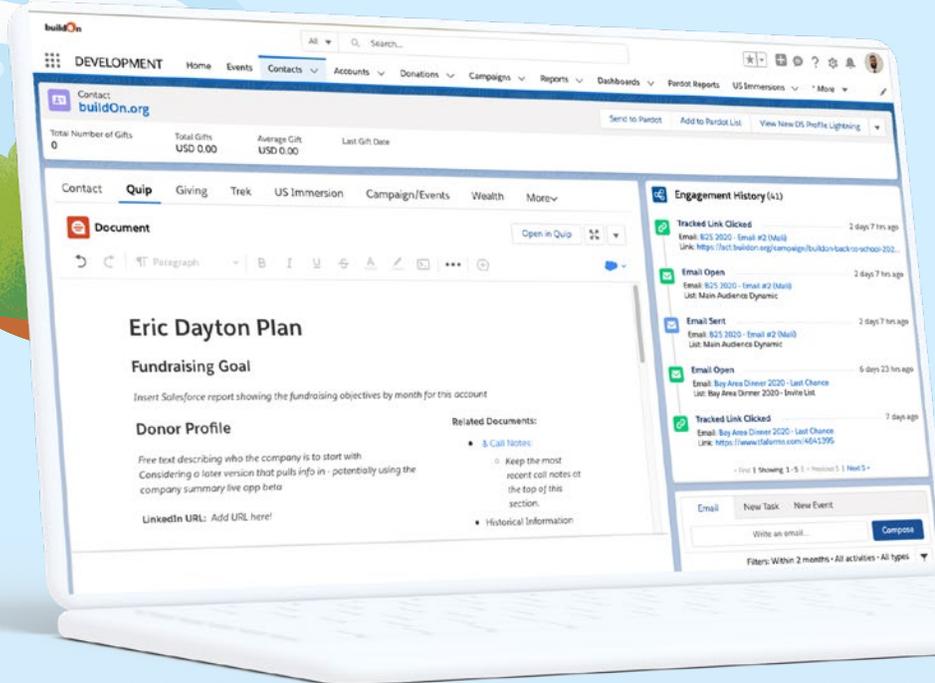
- buildOn saw a 45% decrease in Pupil to Classroom Ratios since 2016 in the 319 primary schools constructed with over 100k students.
- Hit an *all-time record for funds raised* (23% increase) and attendance, in their first fully digital gala.
- Created and dispersed nearly *100,000* masks globally through US High School Students, Donors, and Community Members.
- Use of the Einstein Bots in Malawi resulted in 10,000 message sessions with staff in Malawi over a 2-month period, giving the team measurable results when it came to information about which projects had the most impact.
- Training development staff in Salesforce Anywhere and Tableau allows these teams to collect and interpret data in ways that make them more effective and insightful fundraisers.
- Giving staff the time to focus on learning new technologies strengthens the org's digital-first mindset and prepares them for the next round of change.

Resources:

[buildOn's story of digital transformation](#)

[Segmentation, Cultivation and Stewardship of Donors](#)

[Trailhead: Collaborate with Salesforce Anywhere \(formerly Quip\)](#)



Bringing Client Services Online

featuring [The Healthier Kids Foundation](#)



Maintaining Continuity is More Important Than Ever

Nonprofits exist to help solve problems – and in times of crisis, interruptions in service are not an option. Stepping up to meet the moment and continue to deliver on your missions couldn't be more critical than it is right now.

The Healthier Kids Foundation Meets Kids Where They Are

Healthier Kids Foundation is a family forward health agency that gives children and those who love them the education and tools they deserve to live a healthy life. They do this by bringing preventative healthcare and education to children across Santa Clara County in California. Working with local schools, the Foundation provides children with holistic dental, vision, and health screenings. In 2018, they screened 65,000 children.

Although Healthier Kids started out with a focus on making sure all children in their service area had health insurance, they soon pivoted to health screenings once they realized that the void caused by a lack of school nurses meant kids weren't getting screened regularly. They were collecting many data points about each child and quickly realized that they'd need a robust case management system, but one that was simple and wouldn't require much programming. As their programs grew, so did their fundraising efforts, and they needed a system for that, too.

With the Salesforce Nonprofit Cloud, Healthier Kids is able to manage cases and fundraising on the same system and unify the data, leading to streamlined reporting so funders can see the results of their donations and gifts. During fundraising events, staff use tools

from the AppExchange to help simplify payments and donations and send acknowledgement letters to donors. The Foundation saves time and manpower with Salesforce with workstream automation in both case management and fundraising that the Nonprofit Cloud offers. Preset filters and centralized information help streamline the roughly 3,000 reports and 300 dashboards staff prepare to fulfill reporting requirements.

“We are saving at least two headcount out of a 35 headcount organization with the platform. Normally, my job would be done by a full time employee. If you had two systems, you'd need two people with the volume we're doing because of the volume we have with programming,” says systems administrator Mark Stark.

During the pandemic, the organization - which prides itself on meeting kids and families where they are - pivoted with school closures and leveraged their case management team to help families get critical services including scheduling daycare for the children of essential workers and delivering over 1.7 million diapers and PPE to impacted families. Healthier Kids runs a 1-877 number where over 6,355 people have received help with employment, housing, financial assistance, and food security.



65% of nonprofits said they were able to develop new methods to reach new recipients of our services as opposed to in person according to Salesforce.org's [3rd Edition of the Nonprofit Trends Report](#).

RECIPE

Bringing Client Services Online

People

- Systems Admin
- Case Managers
- Fundraising staff

Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – One integrated platform and CRM for nonprofits to transform digitally; both for managing Fundraising & Programs
- Service Cloud – To manage cases
- [AppExchange](#) – Thousands of ready to use nonprofit applications and components to meet your unique needs
- “Report Builder” from Cloud4J – Send sensitive data in reports to third parties (like schools)
- [Program Management Module \(PMM\)](#) – to track services
- [SMS Magic](#) – Text parents directly with details, diagnoses, and follow-up needs

Steps

1. The Healthier Kids team implemented Nonprofit Cloud to unify and integrate their case management and fundraising efforts.
2. Nonprofit Cloud and the connected apps on [AppExchange](#) makes case management and constituent services much more robust, enabling them to scale their programs and help children and families on a broader and deeper scale.
3. Having systems for unified data and reporting in place allowed Healthier Kids to pivot successfully during the pandemic, leveraging their database to help families in this moment.



Results

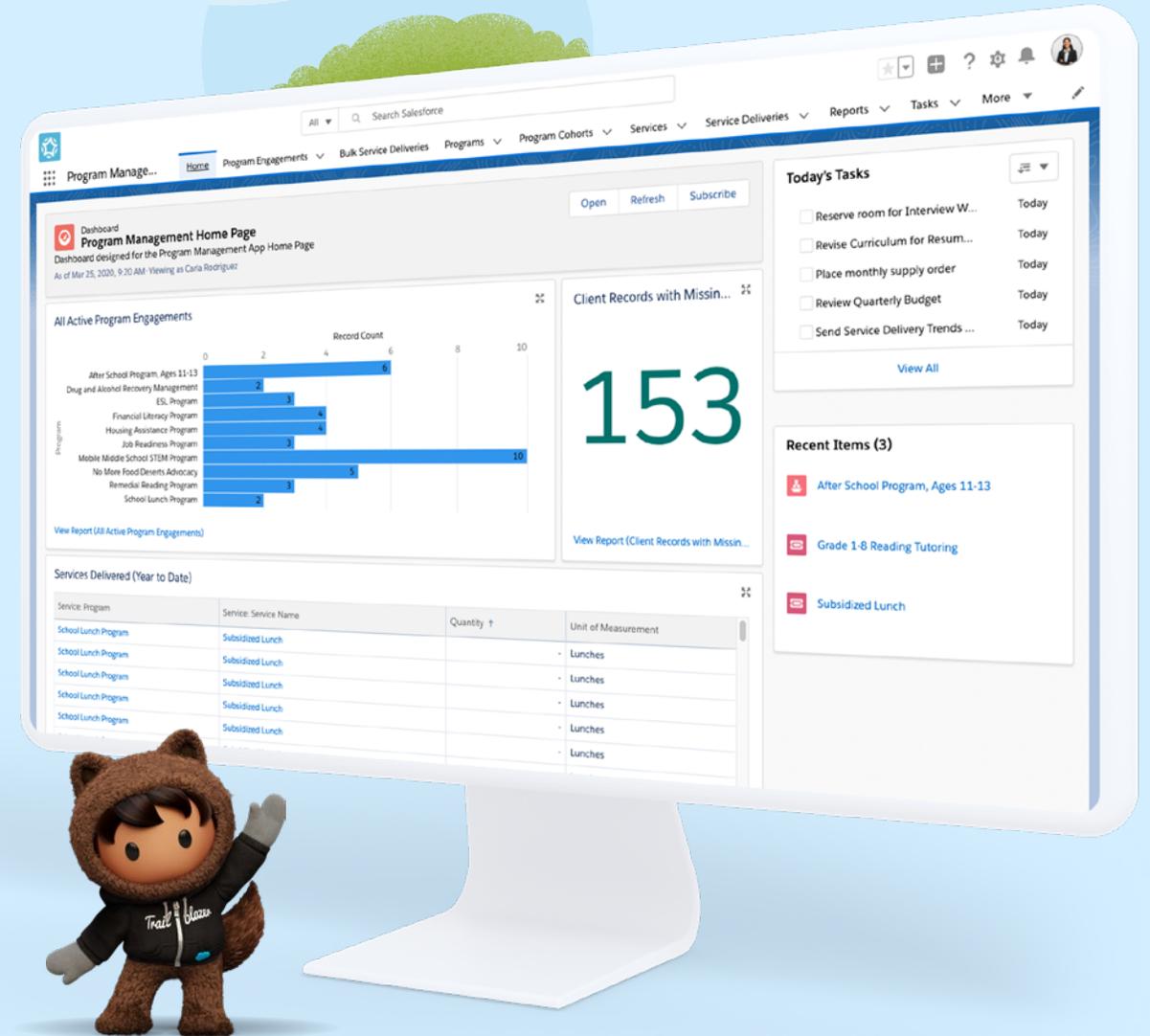
- A streamlined and automated workflow helped lower the organization's operating costs by at least two headcount, according to systems administrator Mark Stark.
- They were able to build more trust and transparency among their donors with fast and accurate reporting that was simple for fundraising staff to use.
- Nonprofit Cloud's flexible platform allowed Healthier Kids to pivot during the pandemic and continue to meet their constituents' needs, even as those needs shifted. They were able to get critical supplies like employment, housing, financial assistance, and food, to over 6,300 people in need, as well as help 400 childcare providers get the PPE and funding they needed to re-open safely, and pilot a mental health screening for older kids.

Resources:

[Healthier Kids Customer Story](#)

[Webinar: Managing Your Fundraising & Programs on the Same Platform](#)

[Trailhead: Manage Programs with Nonprofit Cloud](#)



The Transparency Imperative

featuring [The Jewish Federation of Atlanta](#)



Uncertain Times Call for Building Trust

In any solid relationship, trust is an essential piece of the foundation – even more so in times of uncertainty or chaos. When it comes to the relationships between organizations and donors, one critical way to build trust is to encourage transparency, especially where funding is concerned.

Transparency and Trust are Key Tenets for Jewish Federation of Atlanta

The Jewish Federation of Atlanta is part of a historic network of Jewish communities of support, with a mission to care of, connect, and strengthen the Jewish community throughout greater Atlanta, Israel, and the world. They do this as the philanthropic champion for the Jewish community in Atlanta (via a community campaign distributing funds to over 90 charities in Atlanta and worldwide); by stewarding the Atlanta Jewish Foundation; and as a community planner for Jews in Atlanta. All of these roles require trust from donors and the communities they serve, says Yisrael Frenkel, VP of Donor Operations for the Federation.

Within each of their major programmatic arms, there are many initiatives – from birthright trips to funds that support for aging community members, students, and more. All of these activities result in a ton of data, says Frenkel. “Our job is to maximize that data to serve our mission – and ultimately to serve the community.”

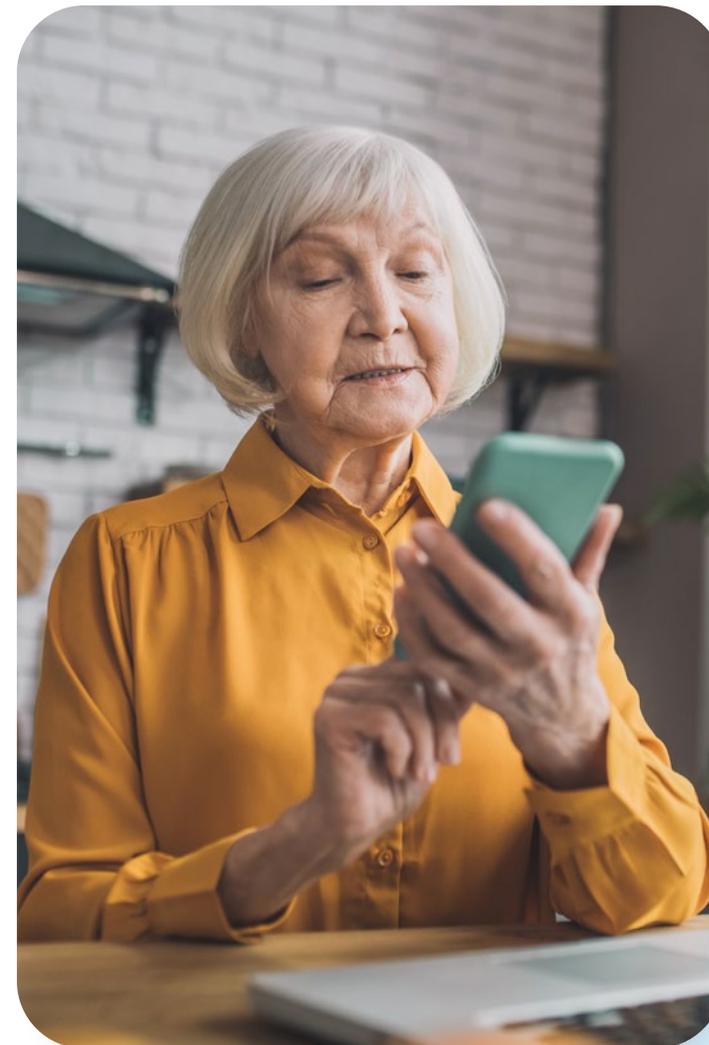
Before implementing Salesforce, Frenkel said the suite of tools the organization used to get the job done was massive – and the tools didn’t all connect to each other. “When those tools don’t talk to each other, we end up with an avalanche of Excel spreadsheets, all being exported, updated, emailed, imported – a complete mess – and one that’s error-prone, inefficient, and ultimately costly” says Frenkel. The inability

to know their constituents from a 360° perspective led to reduced fundraising, reduced donor satisfaction, and reduced program participation.

Upon implementation, the organization created a policy that all tools and services they used going forward would integrate with Salesforce – from VOIP to their accounting system. For finances, for example, Salesforce.org’s Accounting Subledger consolidates data from their CRM and sends it to the accounting system, providing a seamless two-way connection between development and finance teams and their data, ultimately leading to more transparency in terms of seeing and reporting where and how donors’ funds are being used.

With Salesforce as their foundational platform, the Federation was able to build a “culture of holistic data,” and serve their community in a more transparent, empathetic, and accurate way.

69% of nonprofits say the demand for transparency regarding funding has increased in the past five years, which was up 5% from 2018. Yet, less than half of nonprofits share the impact of programs with top donors (48%)* – [2020 Nonprofit Trends Report, 2nd Edition](#).



RECIPE

The Transparency Imperative

People

- IT staff
- Finance staff
- Fundraising staff
- Consultant to help manage the process
- Admin

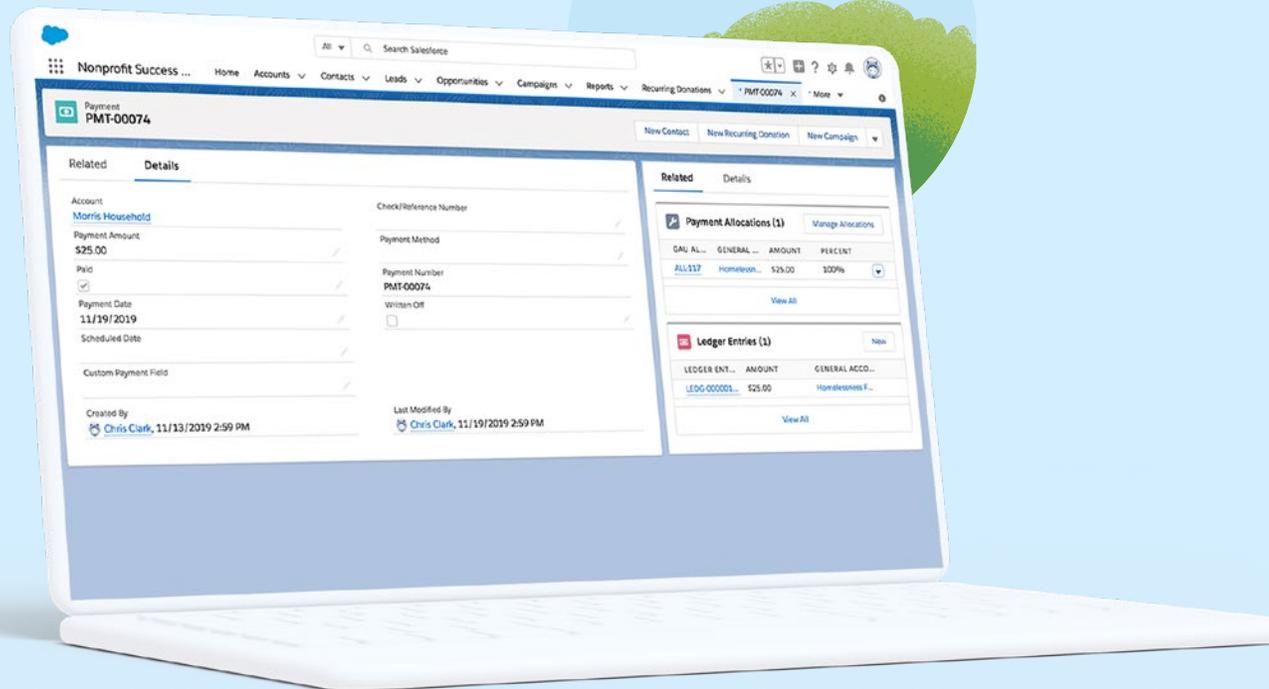
Ingredients: Technology & Tools

- [Nonprofit Success Pack](#) – Allows for comprehensive and unified data collection with Donation Management & Payments Objects to manage donations and payments throughout lifecycle. General Allocation Units to allocate funds to specific programs to track for accounting and impact reporting
- [Accounting Subledger](#) to consolidate data from your Salesforce CRM to your accounting system

Steps

1. The organization implemented the [Nonprofit Success Pack](#) as a way to centralize and standardize their data.
2. They created a policy of only using tools that integrate with Salesforce, allowing data to flow freely between tools, but retaining the single source of truth at the organization's foundation.
3. Implementing [Accounting Subledger](#) allowed their CRM and their accounting system to speak with each other, giving fundraising and finance staff a 360° view of their constituents.





Results

- [NPSP](#) sets the foundation for a culture of holistic data, enabling the organization to build deeper trust-based relationships with their donors and supporters.
- [Accounting Subledger](#) allows for more efficient use of time, greater transparency, and a unified view of giving.
- Integrated fundraising and finance dashboards can help nonprofits achieve member retention at scale by building trust and transparency into automated systems.

Resources:

[Trailhead: Accounting Subledger for Nonprofits and Educational Institutions](#)

