salesforce foundation

YOUR COMPLETE CRM HANDBOOK

EVERYTHING YOU NEED TO GET YOUR NONPROFIT STARTED WITH CRM

Introduction

WHAT IS CRM?

CRM is much more than a buzzy acronym that's been tossed around the business and sales world for the past decade or so.

C-R-M stands for "Constituent Relationship Management."

With a CRM application, there's no secret formula. It simply manages most of your critical constituent information so that you can see it all in one place. Without leaving the app, you can view contact info, follow up via email or social media, manage tasks, and track your impact, among other benefits. Implementing the right CRM can increase organizational efficiency. You can improve relationships with major donors, boost impact, and improve financial accuracy.

Is it time to invest in a CRM?

The contents of this ebook will help you determine that. Over the next four chapters, we will examine the following topics:

- Signs your organization needs a CRM
- How CRM can improve your funding and development
- Building your CRM strategy
- How to maximize your ROI

First up, the 7 signs your business needs a CRM.

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Chapter 1

SIGNS YOU REALLY NEED A CRM

Nonprofit relationships typically begin with a basic connection of organization-to-donor and organization-to-volunteer — simple. In such an early stage, it might be fine to just maintain an Excel spreadsheet or jot down notes about donors and events. But as your organization grows, this sort of record-keeping simply can't do what you need anymore. Here are some warning signs it's time to trade in those old ways and start managing your relationships more effectively:

1. There's no single source for information.

Storing your donor, volunteer, and constituent relationships in more than one location, such as a spreadsheet or notes stuck to your computer, puts your teams at a disadvantage. They lack a single view of every stakeholder's information, donations, volunteering, and interactions.

2. There's little or no visibility.

Not only do you lack visibility into how your stakeholders are connecting with employees, you also lack insight into what your development teams are doing. This makes it difficult to help them be successful – and keep them accountable.

> **As your organization grows, this sort of record-keeping simply can't do what you need anymore.**

3. Reports are tedious and painful.

Generating reports and analytics of your team's monthly progress would be ideal. But creating reports manually is cumbersome, often resulting in no tracking at all.

4. You are losing data.

It's hard for you to schedule follow-ups with donors and prospects. Great meetings happen on the road, but teams don't always transfer their notes and important details get lost, especially if an employee leaves the organization.

5. It's hard to stay in touch on the go.

Your reps are out in the field, meeting donors and advocates and discovering valuable info. But all this new data gets stored on handwritten notes or in files on personal computers, instead of being shared with the team.

6. Every stakeholder is treated the same.

You don't target donors based on their value to the organization. Rather, you are sending the same messages to donors in very different stages of the giving process, as well as in different segments and geographies.

7. You lack a plan to scale fast.

What if your organization grew from 20 to 200 this year? Are you confident that your current processes will scale? If you know that you are going to grow, are you worried about keeping impact up while scaling up?

If any of these apply to you or your team, don't despair. These are exactly the issues that a CRM system can address. Next up, let's take a look at how a CRM makes your organization more impactful.

Does your organization need a CRM?

Not sure if your organization is ready for a CRM? If you check any of the following boxes, a CRM could dramatically improve your organizational performance.

- [ ] There's no single source for information
- [ ] There's little or no visibility
- [ ] Reports are tedious and painful
- [ ] You are losing data
- [ ] It's hard to stay in touch on the go
- [ ] Every stakeholder is treated the same
- [ ] You lack a plan to scale fast

Chapter 2

HOW CRM IMPROVES PRODUCTIVITY

You probably know the old saying, "there never seem to be enough hours in the day." This is especially true in the nonprofit world, where time truly is money. And impact.

The more effectively and efficiently you use your time, the better results to your impact metrics. Nonprofits grow faster by getting better at providing a steady flow of new donors, increasing time spent fundraising, and arming their development team with the info they need to fundraise quickly. That is where a CRM application comes in.

Pipeline

Finding time to bring in a steady flow of new donors can be quite the challenge for a small development team. This is often caused by issues such as:

> **"Salesforce lets us do things that we wouldn't have been possible otherwise with the size of our staff and budget."**
>
> *-Polaris Project*

- Inability to route leads to the appropriate team member
- Lack of information on potential donors
- Inadequate knowledge about a stakeholder before calling
- Poor visibility and forecasting of future funding pipeline

A CRM app allows development reps to store data on prospective donors so the information's ready at each interaction. Plus, it quickly provides metrics related to visibility and forecasting.

Fundraising Time

Obviously, representatives need time to raise funds. Some of the time traps faced by development teams are hard to overcome, but others can be easily fixed:

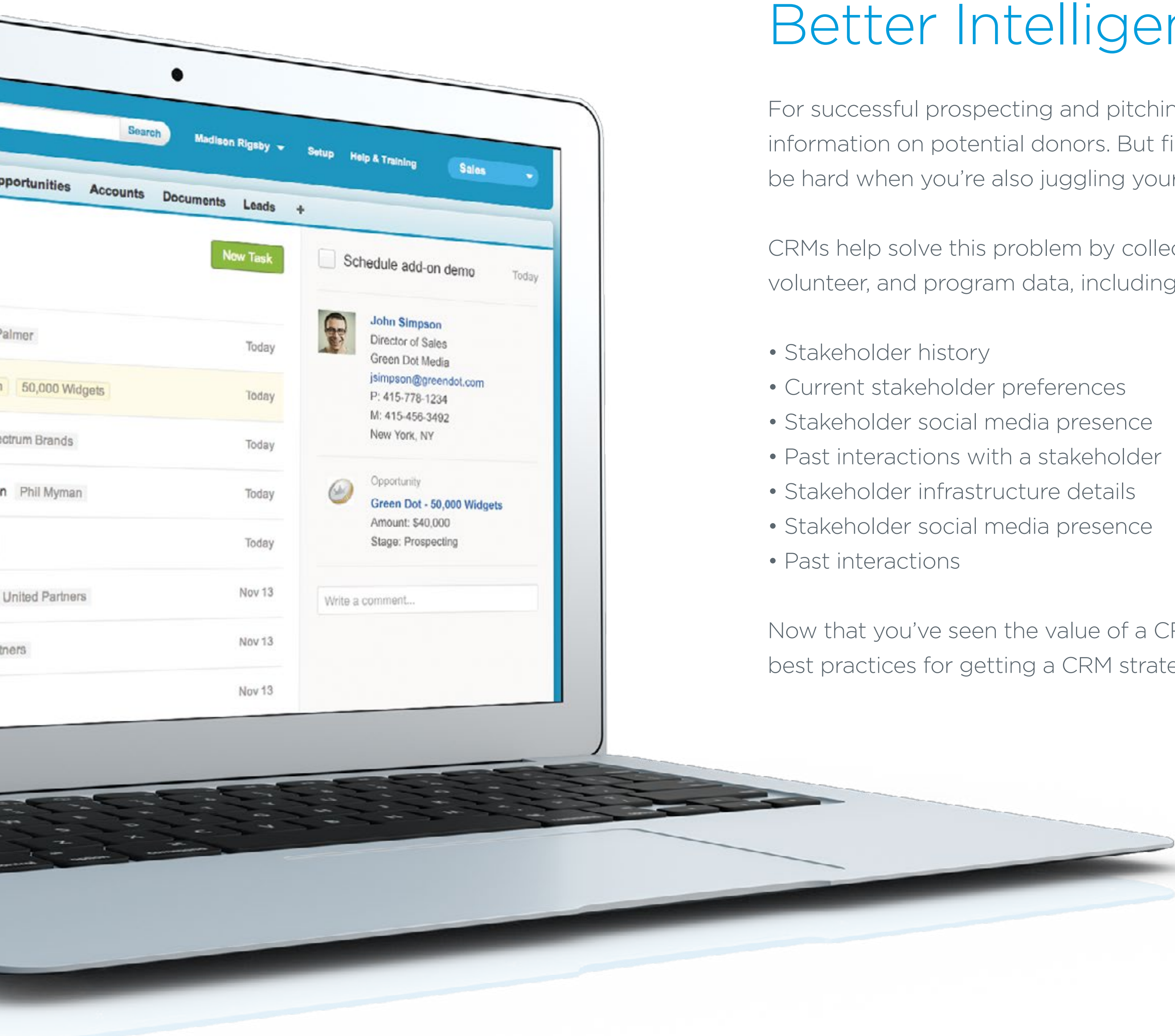
- Communication is a big challenge for a development team on the go, but surprisingly few teams leverage smartphones and tablets as part of their regular workflow. Making the switch to mobile can eliminate downtime and increase communication.

- Automation of repetitive tasks gives team more time to concentrate on building relationships.

- Providing one channel for development teams to share information and connect eliminates endless email loops and phone tag.

The right CRM system syncs with mobile devices anywhere, anytime via the cloud, so the entire team is on the same page and has the most current information at their fingertips.

> "A CRM allows an organization to store the data on stakeholders so the information's ready at each interaction."



Better Intelligence

For successful prospecting and pitching, you must gather vital information on potential donors. But finding time to do that can be hard when you're also juggling your mission.

CRMs help solve this problem by collecting valuable donor, volunteer, and program data, including:

- Stakeholder history
- Current stakeholder preferences
- Stakeholder social media presence
- Past interactions with a stakeholder
- Stakeholder infrastructure details
- Stakeholder social media presence
- Past interactions

Now that you've seen the value of a CRM system, let's investigate best practices for getting a CRM strategy in place.

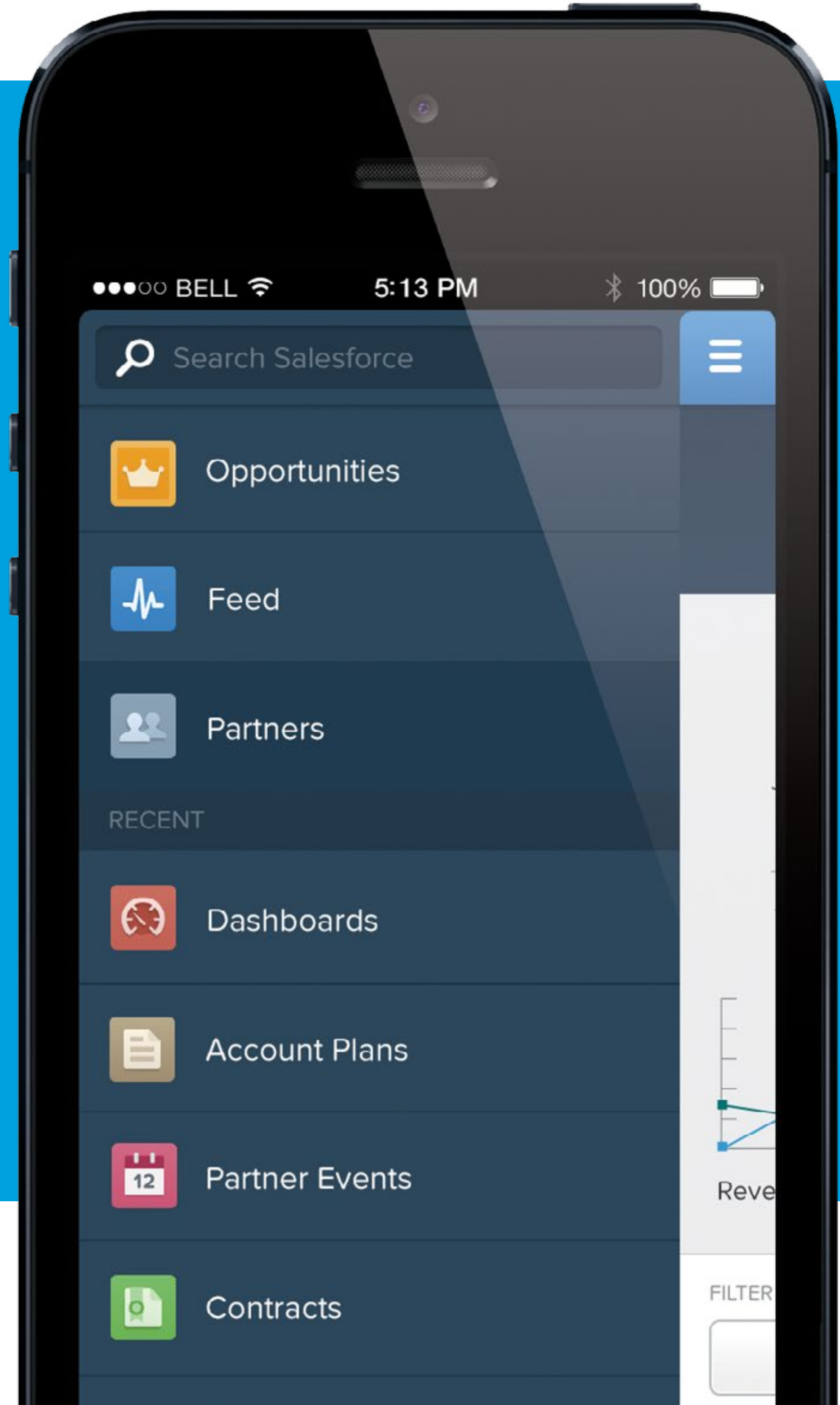
DON'T FORGET TO THINK MOBILE

The Mobile Development Team

As you consider CRM solutions, it's important to consider that the modern development team is no longer confined to their desks for 8 hours a day. They are always on, always connected, and incredibly mobile. When considering any new tool, including a CRM, you should make sure the technology enhances this shift in productivity, and fits into your team's existing workflows.

Mobile CRM Tools

When considering CRM tools, you'll notice that a rare few have functional mobile components. Make sure the technology you are considering does not just add mobile functionality as an afterthought. Solutions like Salesforce1 were built mobile-first with a team's productivity in mind. Designed with apps and features that streamline organizational process and enhance everyday operations, a true mobile CRM can mean the difference between a solution that merely helps your organization, and one that revolutionizes it.



Chapter 3

HOW TO CRAFT A CRM STRATEGY

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from a business perspective. Here are seven basic steps to build a winning plan:

1. Define Your Vision

Some people dismiss vision statements as a waste of time, but successful leaders know the value of having a clear, repeatable, action-oriented vision that your team can rally around. Your vision can be many things, from becoming global leader for your mission, to redefining success for nonprofits. Make it both aspirational enough to have an impact, and clear enough that the entire organization can understand it.

2. Define Your Strategy

Strategy is what makes your vision achievable. Say you want to be a global leader for your mission. Do you do this by increasing policy change, or offering impactful services, or by emphasizing your successful programs?

Building a successful CRM system isn't just about choosing the right technology, as significant as that is. You also need the right plan in place from an organizational perspective.

Building your CRM strategy.

Set yourself up for success by building a comprehensive CRM strategy. Take the following steps to hit the ground running.

- ☐ Define Your Vision
- ☐ Define Your Strategy
- ☐ Define Your Organizational Objectives
- ☐ Get Your Team On Board
- ☐ Identify the Metrics
- ☐ Prioritize Your Initiatives
- ☐ Define Your Roadmap

3. Define Your Organizational Objectives

Organizational objectives are where vision and strategy get translated into the day-to-day work. A common mistake when implementing a new CRM system is to replicate in it all the old objectives and processes, complete with their inefficiencies. Instead, view your implementation as an opportunity to review and optimize how you work.

4. Get Your Team On Board

Executive sponsorship is vital for your CRM vision, strategy and objectives, and for a successful rollout. A lack of executive sponsorship is one of the top five contributing factors to CRM failure.

5. Identify the Metrics

"You can't manage what you can't measure" is an adage attributed to many business thinkers – and it applies to nonprofits as well. Metrics should be visible to everyone, and this means creating dashboards for all levels of the organization, from fundraisers and managers, to the executive team, to the board of directors.

6. Prioritize Your Initiatives

You're not going to get everything done at once, so decide what's most important to deliver first. Training is often the priority, so everyone is ready to use the new CRM system as soon as it is available.

7. Define Your Roadmap

You shouldn't look at building an effective CRM system as a "big bang" event. Yes, a successful rollout is vital, but being able to deliver enhancements and new features after you go live is equally important. Plan beyond launch day and consider what other capabilities you need to deliver for the organization.

Now that your CRM system and strategy are in place, it's time to see the best ways to measure and maximize the technology.

Customer Spotlight:

Black Jaguar Foundation

When the Black Jaguar Foundation was looking for a tool to help them grow and modernize their organization, they turned to Salesforce to help them do it. With new insights into their worldwide fundraising base, their partners, and their sponsors, they can truly impact the realization of the Araguaia Nature Corridor – the earth's longest biodiversity corridor – and support the ecosystems that supply 20% of the world's oxygen, filter 30% of all sweet water, and are the source of 25% of all modern medicines.

Watch the film ›

"As a tool we would recommend Salesforce to any Nonprofit. It's reliable, fully customizable, and suits small organizations just as much as larger ones."

–Ben Valks, Initiator, Black Jaguar Foundation

Chapter 4

MAXIMIZING YOUR ROI

Here are several best practices to remember when working to maximize your ROI, from CRM Search's Karen D. Schwartz:

Choose a Cloud-Based CRM Solution

All major CRM vendors offer cloud versions of their apps. Choosing this software as a service (SaaS) model means companies no longer have to deal with things that on-premise CRM apps demand, like servers, software issues, and new version upgrades.

Integrate with Applications that Provide Value

Take advantage of the new business and social applications that are out there, and integrate them with your CRM system. These include marketing automation and accounting software, plus key social tools, which allow your company to follow people, information, and groups on social networks, and capture real-time data.

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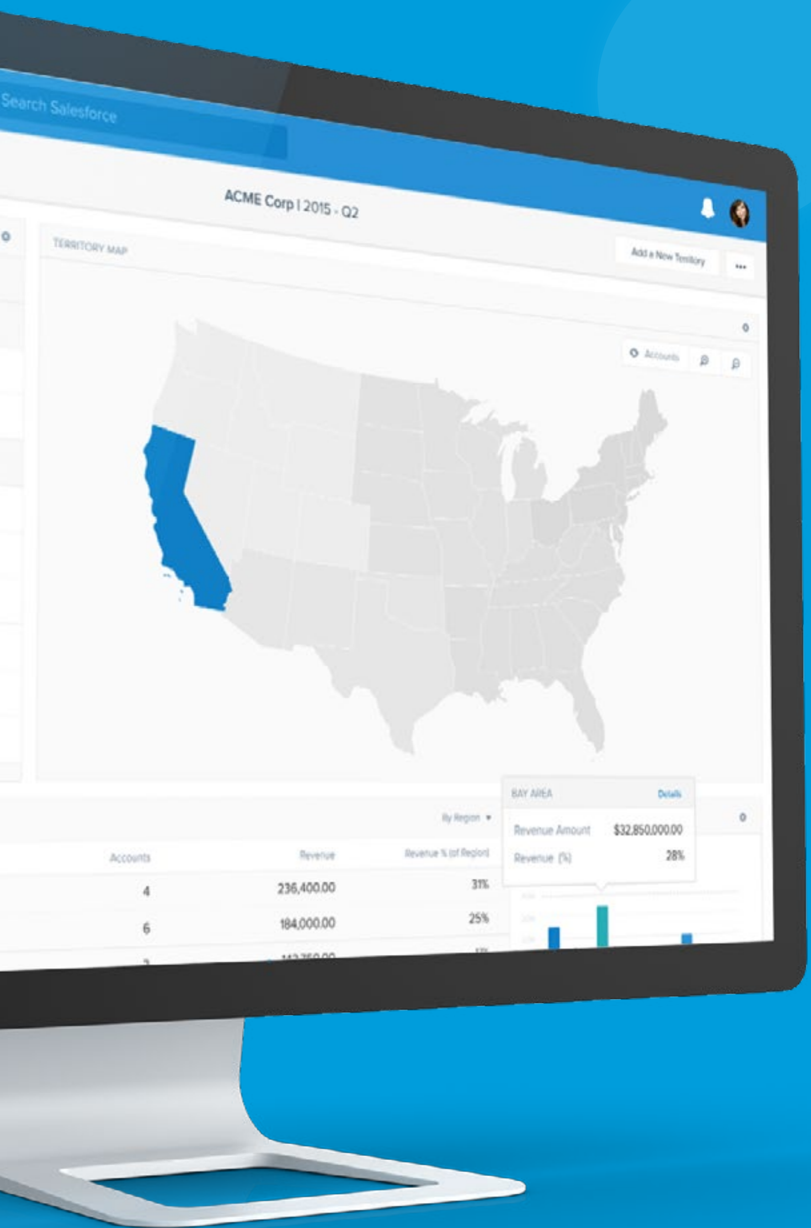

Allow for Mobile Integration

Make everything accessible on mobile devices for your employees so they can work on the road — things like reviewing correspondence, managing contacts, and accounts. The integration should also ideally work with back-office systems, social networks, and web conferencing.

And so you are fully covered, here are some practices to avoid when working to maximize your CRM ROI, from CRM Buyer's Christopher Bucholtz:

Infighting Between Development & Marketing

CRM data is valuable when used to qualify leads for the development team and to show which marketing campaigns and events lead to closed fundraising. But these insights can be missed if development and marketing don't work together. Before you do anything else, get both departments in a room to map out common goals, and to discuss how to use the data.

Generating Reports for the Sake of It

The right CRM application can present data in an almost effortless preformatted report. But this analysis will do you no good if it is ignored. Take the time to not only read the reports, but to understand and act on them when needed.

Building "Relationships" with Stakeholders

CRMs are an excellent tool to connect with your stakeholders – whether donors, advocates, volunteers, or all of the above - and build relationships that grow over time. But don't just assume that everything is fine and well. Be aware that stakeholders evolve and change, and a successful organization changes with them.

Conclusion

Any successful nonprofit should start with a foundation of great relationships, with you, the donor, the volunteers, the advocates, and connecting with people impacted by your mission.

As your organization expands, these connections become more sophisticated. It's not just a transaction. You also need to share information across the various teams within your own organization that are making contact with the same stakeholders. A CRM system can serve as a vital nerve center to manage the many connections needed in a growing organization.

In a world where the most successful nonprofits are constituent-focused, CRM apps make the constituent king. In short, CRM apps are how organizations truly become "connected nonprofits."

BECOME A CONNECTED NONPROFIT

If you want a unified view of every interaction clients, supporters, members, funders, volunteers and affiliates have with your organization, you need an easy-to-use Constituent Relationship Management system. Salesforce allows you to store client and stakeholder contact information, accounts, events, and opportunities in one central location.

Learn more ›

84% Improved Ability to Achieve Mission

86% Improved Overall Efficiency

salesforce foundation

THE CUSTOMER SUCCESS PLATFORM