

PRO BONO SERVICE PROJECT SCOPING QUESTIONNAIRE

The purpose of this document is to capture the nonprofit organization's business processes overview and intended usage of Salesforce technology.

The Pro Bono Service projects that are successfully completed are those that start with a very clear idea of what you want the volunteer to accomplish. While ongoing volunteer relationships may emerge from this program, the initial goal is to define a specific project that a volunteer can complete within a designated time frame.

Before requesting volunteer assistance your organization should fill out this document fully to be able to understand:

- a) What specific problems your organization wants to solve using Salesforce
- b) What your Salesforce implementation will look like
- c) Who will be managing which pieces of your implementation
- d) Where the volunteer will be able to fill the "cracks"

Only after filling out this document and going through the steps above is your organization eligible to request Pro Bono service. Send the completed document to probono@salesforce.com.

A note about the trainings:

There are a number of trainings listed throughout this scoping questionnaire. Unless otherwise noted, to access these trainings, log into your Salesforce account and click on the *Help & Training* link at the top of your screen. Click the Training tab. To find each training, you'll want to choose the user role in the pull down tab, you'll see the trainings listed. All trainings here are free and on-demand with knowledge tests at the end.

Contents

Section One: Nonprofit Overview & Organizational Readiness

This is the first step in learning what a Pro Bono project could look like for your organization. The goal of this section is to make sure your organization has an understanding of the end goal of using Salesforce.com and to give your volunteer context to your organization, the processes you have in place currently, and where your existing information is located.

Section Two: Defining priorities of using Salesforce technology and volunteer assistance

The most successful volunteer projects are those that are clearly defined. Figuring out your top priorities and your vision on how these would be solved using Salesforce will help define the volunteer request.

Section Three: Focused Functionality Requests

This section will point you towards training where you can start learning about functionality available in your donated Salesforce account. Going through the trainings and defining how you want to use specific functionality within your organization will help your organization communicate most effectively about what you would like the Pro Bono volunteer to do.

Section One: Nonprofit Overview & Organizational Readiness

- How many staff do you have?
- How many staff will use your Salesforce account?
- How many locations do you have? (Include each staff, volunteer or board member working remotely in this number?)
- Do you have high speed internet at each location?
- Who is the primary contact who will be managing your Salesforce account? What is their contact information? Include past experience with this type of work.
- Is there a Steering Committee or defined group in place to oversee this implementation and ongoing iterations of your Salesforce account? Who is our main point of contact for any possible escalations?
- What resources are available from your organization to support the implementation effort (e.g. project manager, technical, testing, training, communications, IT, board members, volunteers)? Would they be dedicated full-time or part-time? Are they available to start immediately? Where are they located? How much time are they willing to give to this project? Are they available long term or short term?
- What operating units will be using Salesforce and what is the breakdown by group? (i.e. our fundraising department and client services are both using it, or we only have three total employees and all will be using it to manage all communications with constituents).

Section Two: Defining priorities of using Salesforce technology and volunteer assistance

Directions: Complete the trainings, then fill out the questions below

1. Training Requirements:

1. *Nonprofit Weekly Webinar (Tuesdays at 9 am PST, if you've already received the donation, feel free to dial in at 40 minutes past the hour to view the functionality available for nonprofit organizations).*
2. *System Administrator – Salesforce Fundamentals*

2. Questions:

- Overview of your organization (What is the mission of your organization? How is your organization set up to work towards these goals? If you have any organizational charts please include them)

- Who is the executive sponsor of the project (name and role within organization)?

- What are your objectives for implementing Salesforce?
 - 1.
 - 2.
 - 3.

- What is the expected impact for each of the objectives listed above? (ie How are you going to measure the success of using Salesforce in each of the areas you listed above?)
 - 1.
 - 2.

- What are the ways with which you will measure the success of this project (e.g. less administrative time, increased funds raised, greater constituent base, strategic planning of future resources, etc)?

- Is there an event driving the decision? Old system no longer supported? License renewal of current system? Upcoming fundraising campaign?

- Do you have the Nonprofit Starter Pack or Standard Salesforce?

- Have you done an initial implementation of Salesforce into your organization? If so, please provide the details.

- Please give a three or four sentence overview of your pro bono project request.

3. Please indicate which areas you are hoping to utilize Salesforce for: (For Section 3 – Only fill out those sections of which you checked boxes).

Data Migration
Constituent Management

Marketing Automation (using salesforce to manage new interest in your program, generating greater constituents, managing events, appeals and campaigns)
Case Management
Dashboards and Reporting

Please list 2-3 of your biggest obstacles in utilizing your Salesforce account that are critical to your organization and which you would like to discuss during your initial meeting.

- 1.
- 2.
- 3.

Section Three: Focused Functionality Requests

Data Migration:

Yes No

Training Requirement/s:

[Advanced Importing](#)

- What is your implementation timeline? Is there a specific date you are trying to hit for the launch and why? Are there key events between now and then?
- Where is your data currently? Please identify all sources including spreadsheets, Outlook contacts, people's heads etc.

| Current location | What type of data (ie constituent name, | Primary owner of this information |
|------------------|---|-----------------------------------|
| | | |
| | | |

- What are the pains driving the replacement of the existing CRM solution?

| | Marketing Automation | Sales Force Automation | Customer Service and Support |
|--------------------|----------------------|------------------------|------------------------------|
| Organization Pains | | | |
| Technology Pains | | | |

- What email system do you use?

Constituent Management:

Yes No

Training Requirement/s:

[Admin Fundamentals: Setup](#)

[Admin Fundamentals: Customize](#)

- What are your major pains today?
- List all possible roles of your constituents (volunteers, donors, program participants, etc)
- Based on the roles above can these constituents have more than one role (ie they are a volunteer and a donor)?
- If you are planning to use Salesforce to track donations, please indicate your donations processes for one time donations, recurring donations, memberships, major gifts, pledges and any other donations processes your organization utilizes.
- What is the high level structure of the sales organization (distributed, indirect / direct)?
- If someone is coming to your website interested to learn more, what types of opportunities would you like to offer (ie. volunteering, donations, event registration, etc).
- How do the employees within your organization currently manage their contact lists?
- What is the model of relationship you have with your constituents?
 - Every constituent is related to an organization or account
 - Every constituent is an individual and we do not have households
 - Every constituent is an individual and many are part of larger households
 - Some constituents are related to organizations other constituents are individuals and may or may not be related to a household.
- Are any products, services, contracts sold by your organization?
- Who are some of your organizations partners? Who do you currently track them?
- What sort of data do they currently have access to offline? What would they want offline?

- Who does data entry for your organization?

Marketing Automation – (Lead Source Tracking, Campaign ROI, Mass Email Execution?)

Yes No

Training Requirement/s:

[Campaign Management](#)

- What are the major pains that exist in Lead Source Tracking, Campaign ROI, Mass Email Execution today?
- How is the success of campaigns judged today?
- What is the Percent of leads inbound / outbound?
- Is there a developed Lead Management process, for example what do you do when new people contact your organization regarding different things?

Describe:

- Are leads captured from the website?
- Who qualifies or generate leads (i.e., new constituents interested in your organization)?
- How are leads generated?
- Describe a typical campaign?
- What type of campaigns are executed:
E-mail Direct Mail Advertisement Trade Show
- What is currently being used to track leads and campaigns?

Service and Support:

Yes No

Training Requirement/s:

[Customer Support Fundamentals](#)

- What are the major pains that you're experiencing in support today? (lack of metrics on staff / customers, call management, lack of shared knowledge?)
- Who handles support in your organization (case managers, volunteers, hotline employees, etc)?
- Within a support group how are the team structured (by skill set, product, etc)?
- Is there a Support process?
- How are cases or trouble tickets logged today? Is there a system used to track this information. If so, what is it?
- How do you assign cases? Are they assigned to queues, individuals?
- How do you receive most of your inquiries (Email, Fax, Phone, Web)?
- What are the major reasons constituents call in? Please provide some specific examples?
- Do you charge for support?
- What is the structure of the support department? Who does support report to?
- Are cases escalated? What is your escalation process?
- Do you currently have a knowledge base or an FAQ to resolve customer or internal questions?
- Do you receive cases from your website?
- Do your customers have access to your support system, via the web?

- How many cases do you receive a day?

Reporting and Dashboards:

Yes No

Training Requirement/s:

[Reporting Fundamentals](#)

[Dashboard Mechanics](#)

[Nonprofit Reporting Workshop](#)

- How do executives currently track reports throughout your organization? How do departments or individuals share status of programs or events with management?
- Is it possible to get a copy of any of these reports?
- Please indicate what reports your organization needs to access on a regular basis and examples of how you are currently gathering this information.