

# 3 steps to managing members and donations with Salesforce CRM

## Abstract

Find out how to enhance your fundraising campaigns and build stronger relationships with your members.

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Although donations and members are the lifeblood of your organization, it's often hard to know much about them. Knowing your members and keeping critical information about your relationships with them in a single place helps get those critical donations—and grow healthier and deeper relationships.

With the tools in Salesforce CRM, you can quickly boost membership development and donations. For example, by generating reports based on donation history, you can create targeted campaigns to reach out to at-risk members. 211 San Diego, an organization that provides referrals to more than 5,000 health and service programs in the community, credits raising \$600,000 to the ability to track donations and improve communications with Salesforce CRM.

This document covers the 3 steps to using Salesforce CRM to increase the sophistication of your fundraising activities and member management, without a significant investment:

1. Prepare for success
2. Get up and running
3. Step it up

## 1. Prepare for success

When we asked our most successful nonprofits what they did right, they said it was the up-front investment in planning that made all the difference. Your Salesforce CRM implementation will grow and evolve over time, but planning will always be the critical backbone that ensures your success.

- ⌘ **Review your process** – Can you clearly describe your process for getting new members? Do you know and track all your donation sources? Have you identified what information you want to give to your members—and when? It's important that you clearly understand these processes so you can duplicate them in Salesforce CRM. Use this [guide](#) to map your processes to prepare for using Salesforce CRM to step up your fundraising.
- ⌘ **Clean your data** – Before you think about mass emailing those contacts that have been in your Excel spreadsheets for years, get rid of all those duplicates. Your relationships can only be as good as the data you have about your contacts. Check out the tools on the AppExchange to clean up your data, such as [DemandTools](#), which discounts its products for nonprofit organizations.
- ⌘ **Keep it simple** – Start with just the fields you need and identify new fields and processes as you become familiar with the application. Start with the basics—Donation amount, Stage, and Posting date are critical information you'll want to track. You can add other fields in the future. The fewer hoops that are needed to log a donation or inform a member about a capital campaign, the more likely it is your members and users will adopt the process. More sophisticated uses will become obvious as your organization evolves.

## 2. Get up and running

This section describes the standard tools you can use to improve the results of your fundraising and relationship-building efforts. You can find more information about them in Help & Training.

- ⌘ **Dashboards and reports** – To get started, use standard reports such as the LYBUNT and SYBUNT reports included in the [Nonprofit Starter Pack](#). You can also use the report wizard to create custom reports to track your donations, both over time and in relationship to specific goals. Once you have the reports you need, don't forget to save them to a folder and make that folder accessible to the people who need the reports.

Best practice

Once you create your reports, you can also display that information in dashboards, so that it's always visible. Again, it's a good idea to start out with simple dashboards; a funnel looks nice, but all you may need is to show your top five at-risk donors. Make the most of your dashboards by mailing them to your team weekly or making them available on their home pages. The graphic below shows sample dashboards for nonprofit organizations.



- :: Campaigns** – Campaigns help identify the people you want to reach and then track the results of your appeals. Campaigns can take many forms, from targeted email solicitations to invitations to events. You can create targeted campaigns based on various attributes so you can customize your appeals based on donation trends, geographical location, or membership type. By linking prospects to campaigns you can track prospects over time, using customized campaign member status values. Campaigns can also help determine how effective various activities are in reaching your goals.
- :: Opportunity and donation stages** – The donation object (record) is the standard opportunity object, renamed for nonprofit organizations. This object includes a Stage field for tracking long-term membership and donation trends and sending out targeted communications based on the stage. You can also assign specific activities for your staff to follow up and create a complete record of all activities associated with a donation or pledge.
- :: Email templates** – Once you set up segmented campaigns with different goals, you can customize your email templates to send inexpensive, focused communications to the people targeted in each campaign. Use the merge fields to make these communications more personal and add attachments such as your annual report to remind donors of your mission. For more information about setting up email templates, see the Best Practice [“Turbo-charge customer communications with email templates.”](#)

If Salesforce CRM's daily email limits (1,000 emails per day per user or 2,000 per account) aren't enough, explore the mass email marketing tools available on the AppExchange, such as [Vertical Response](#).

### 3. Step it up

After you define your processes and start using the standard tools, review what's working, what isn't, and what else you'd like to do. Then check out the following resources to extend your success in your fundraising and membership activities.

- :: Browse the AppExchange** – You'll find a number of tools that can dramatically increase the effectiveness of your fundraising, including the donated and discounted applications available to nonprofits. Ranging from e-commerce solutions you can use to integrate online donations into your Salesforce CRM account to apps that let you customize direct mailings from Salesforce CRM, these solutions can be the secret sauce of your fundraising success. CongaMerge, eGiving, and Vertical Response all focus on various aspects of the fundraising process.

- :: **Consider a partner** – As your fundraising success with Salesforce CRM grows, so will your needs. Be sure to explore our [partners](#) with the expertise to manage complex fundraising efforts with additional tools built on the Force.com cloud platform.
- :: **Review your processes** – Once you have a sophisticated donor platform, remember that one of the biggest perks of Salesforce CRM is its flexibility. Be sure to periodically schedule time to review and evaluate your processes, campaigns, and reports. Innovating as you go will help you build a stronger donor and member community.

### Summary

By creating innovative, flexible, and familiar donation and member management processes in Salesforce CRM, you'll increase your ability to achieve your mission. Here are some additional resources to help you become even more effective:

- :: Check out [this session](#) that showcases best practices in donor and member management.
- :: Get connected with [other nonprofit users](#) who manage their donations and members in Salesforce CRM.
- :: Review these [videos](#) to learn more about specific fundraising examples you can manage in Salesforce CRM, using the Nonprofit Starter Pack.

#### For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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