**CharityConnect CRM – Donor Transparency & Engagement Platform**

**Phase 1: Problem Understanding & Industry Analysis**

**Industry:** Non-Profit / Charity (Crowdfunding & Donations)  
**Project Type:** Salesforce CRM Implementation (Admin + Developer)  
**Target Users:** Donors, NGO Staff/Admins, Beneficiaries

**Problem Statement**

Non-profits struggle to build trust and engage donors due to:

* Scattered donation records in Excel/Sheets.
* Limited visibility into how donations are utilized.
* No reward system for recurring or loyal donors.
* Manual effort in sending updates, receipts, and impact reports.

This leads to **low donor retention, inefficiency, and declining trust**.

**Goal**

Develop a Salesforce-based platform that:

* Centralizes donors, donations, campaigns, and beneficiaries.
* Provides **real-time donation tracking and impact reports**.
* Introduces **innovative engagement features** (Smart Cart, Loyalty Points, Badges, Forecasting).
* Automates thank-you emails, festive donation drives, and reminders.
* Enhances transparency through dashboards and donor profiles.

**Requirement Gathering**

**Business Needs**

* Centralized platform for NGO staff and donors.
* Automated donation tracking + communication.
* Gamification features to retain donor interest.
* Impact-driven dashboards for staff and donors.

**Functional Requirements**

* **Donor Object** → details, donation history, loyalty points.
* **Campaign Object** → fundraising goals, progress.
* **Beneficiary Object** → supported communities/individuals.
* **Donation Object** → links Donor → Campaign → Beneficiary.
* **Smart Donor Cart** → select multiple campaigns, auto-total.
* **Donor Loyalty Points & Badges** → points for each donation, auto-badges via automation.
* **Impact Forecasting** → formulas & dashboard to show future impact.
* **Festive Campaign Triggers** → seasonal auto-reminders.

**Non-Functional Requirements**

* Mobile-friendly via Salesforce app.
* Role-based access (Donor, NGO Staff, Admin).
* Scalable for thousands of donors.
* Easy UI using Lightning App Builder + LWCs.

**Stakeholder Analysis**

| **Stakeholder** | **Needs / Responsibilities** |
| --- | --- |
| Donors | Donate easily, see real-time impact, earn rewards (points & badges), forecast future impact. |
| NGO Staff | Create/manage campaigns, track donations, run festive drives, update beneficiaries. |
| Beneficiaries | Receive support, provide updates, connect transparently with donors. |
| Admin | Manage setup, security, permissions, and ensure compliance. |

**Business Process Mapping**

**Current Manual Process**

* Donations recorded in Excel.
* Donors informed via manual email/WhatsApp.
* Reports created monthly with delays.
* No systematic loyalty/reward tracking.

**Proposed Salesforce Process**

1. Donor selects multiple campaigns → added to **Impact Cart**.
2. Total donation auto-calculates → stored as Donation record(s).
3. **Thank-you email** sent automatically.
4. Recurring reminders + festive campaign appeals triggered by Flow.
5. Donor earns **Loyalty Points** → when thresholds met, **Badges auto-assigned**.
6. **Impact Forecasting** shows how future pledges translate into meals/benefits.
7. Dashboards auto-refresh to show real-time donor & campaign performance.

**Industry-Specific Use Cases**

* **Smart Donor Cart** → e-commerce-like donation experience.
* **Donation Transparency Dashboard** → live usage of funds.
* **Gamification with Loyalty Points & Badges** → motivates donors.
* **Impact Forecasting** → future impact visualization.
* **Festive Campaign Triggers** → seasonal drives like “This Diwali, sponsor a meal.”

**AppExchange Exploration**

* **Nonprofit Success Pack (NPSP):** Base framework for NGO donation tracking.
* **Conga Composer:** Auto-generate donation receipts.
* **FormAssembly:** Custom donor registration forms.
* **SurveyMonkey:** Collect donor feedback post-campaign.