**Advanced CRM Data Taxonomy Design**

**Description:**  
Developed a comprehensive and flexible data classification schema for Salesforce CRM to provide a unified, 360-degree view of donors, partners, and beneficiaries, supporting effective grant management and stakeholder engagement.

**Key Elements:**

* Defined core CRM entities (contacts, organizations, grants, events) with attributes customized to UN and NGO donor management requirements.
* Developed relationship models capturing complex multi-level donor partnerships and beneficiary program linkages common in humanitarian projects.
* Implemented tagging and segmentation standards enabling targeted donor engagement and reporting by region, donor type, and project impact.
* Established metadata management policies to facilitate advanced analytics and ensure data quality.
* Configured duplicate detection and merge rules to maintain clean and accurate donor records.
* Integrated CRM data flows with SAP finance modules to automate donor reporting and grant reconciliation.
* Developed user access controls and governance policies aligned with UN security frameworks.