CEGV Final Report

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1. Executive Summary

This report addresses the Coalition for Ending Gender-Based Violence and their current use of software to run their nonprofit and collect donations. Within is a detailed account of the current state of system usage by the coalition; usage of Salesforce and other supporting software, as well as details about future system usage.

The Current State will highlight main processes within the coalition, such as receiving donations and tracking donors, as well as primary user roles within the system. Extra software that the coalition licenses and requires to conduct their business is also mentioned. Risks of continued use of the old system as well as well as motivations for system change are clarified further.

The report moves on to explain a Future State goal involving various improved processes, the software they require, and an analysis of the benefit they will provide the coalition. Assessments of risks and alternative solutions are discussed here.

Keys for success in implementing the ideas explained as well as restatement of the motivations of this system upgrade conclude this document.

2. Overview

2.1 Client Overview

Lauren Peterson is the Fund Development Manager for the Coalition for Ending Gender Based Violence (CEGBV). The CEGBV is a non-profit organization that works within King County to provide support for gender-based violence survivors. The main way the coalition achieves this is through funding individual projects to help survivors and by providing support for other similar institutions. In order to fund these projects, the coalition relies on donations from various sources. Lauren has been with the coalition for four years and in that time, she has become familiar with their current system for donation management. Her role as Development Fund Manager entails intimate and constant use of SalesForce, their main databasing software for tracking information about donors. Her commitment to increasing the efficacy of the coalition has led her to seek a remodel of their current systems which are deficient in several areas. Lauren has cited that the connectivity, availability, and ability to perform necessary tasks are the deficient areas for their current system.

- Specifically will provide Lauren with the following:
    - Detailed analysis of how their system is currently running. Listing the challenges and strengths.
    - Analyses and resource estimates for any transitions, upgrades, or process changes needed to improve the system.
    - Assessments of any relevant alternatives, risks, or feasibilities. Provided in the most accurate terms possible.
    - Outlines of the future processes, tools, and subsystems that could positively benefit the organization.

2.2 Project Overview/Scope

This project was initialized for the Coalition for Ending Gender Based Violence by Mike Doane. The project criteria consists of our team analyzing the current business processes used by the coalition with Salesforce Enterprise in order to provide a coherent plan dictating the transition to Salesforce Nonprofit.

The current issues faced by the coalition are apparent in the ease of use, prevalence of use, and potential uses of the Salesforce CRM. As of the current state, the coalition makes use of a system that consists of technologies that are not optimal for the coalition's uses. The enterprise version of Salesforce combined with VerticalResponse, Click-and-Pledge, and Quickbooks has resulted in a system that is inefficient for the client. Additionally, only one or two people really utilize Salesforce which limits the coalition's members' in obtaining the data they need in order to perform their work. The members of the coalition also don't have any technology related backgrounds, so finding software that can assist the coalition is difficult. Our project will look to address these challenges by looking to plan the setup of the coalition's new Salesforce CRM as well as any auxiliary software.

What this project entails is the examination of how the coalition currently makes use of the Salesforce CRM and identify any functions not being used that would assist the coalition in their operation while making any improvements to their current state of operation. This includes analysis of the software that the coalition is currently using in concert with Salesforce (Such as Click-and-Pledge and Vertical Response) and identifying if there are changes that would help the coalition in using Salesforce to accomplish their data organizational needs. We also need to take a look at the operational processes currently utilized by the coalition in using Salesforce, see which elements could be improved, and provide recommendations for a more optimized process. This will require the examination of the coalition's Business Process Models and generating improvements to them.

This project will not include the planning or implementation of the data migration from the coalition's current iteration of Salesforce to the new Non-Profit version. The scope of this project will be limited to the analysis of the current system in place at the coalition and the design of a potential improved system.

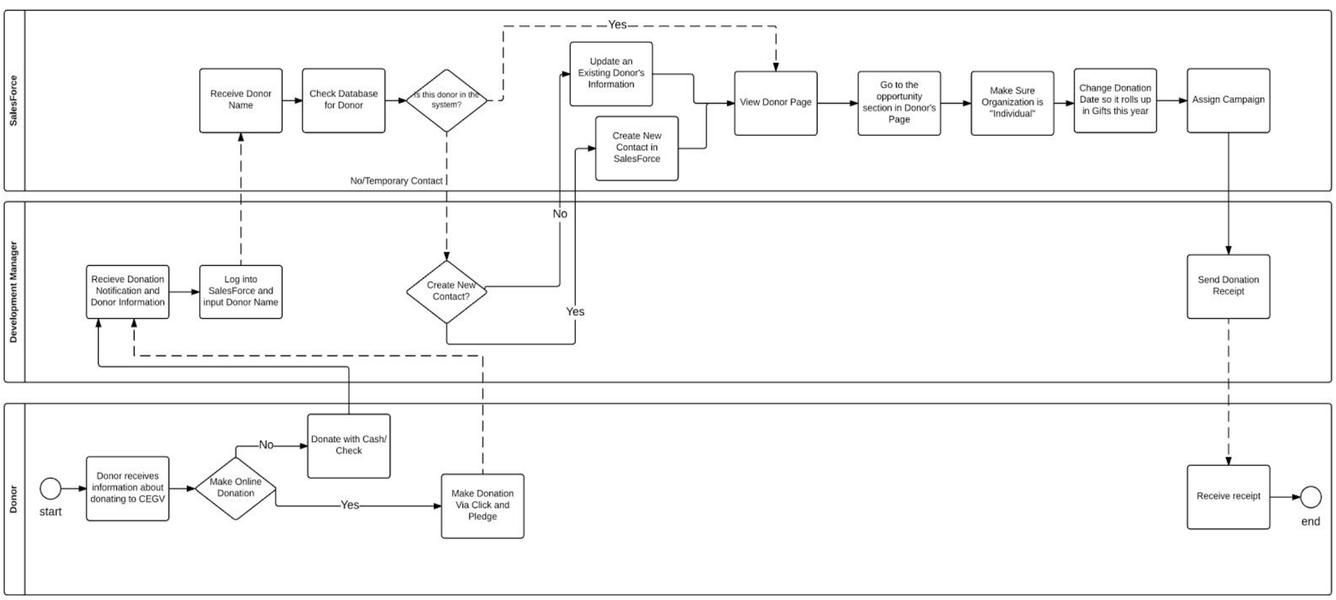
3. Current State Analysis

3.1 Current System Overview

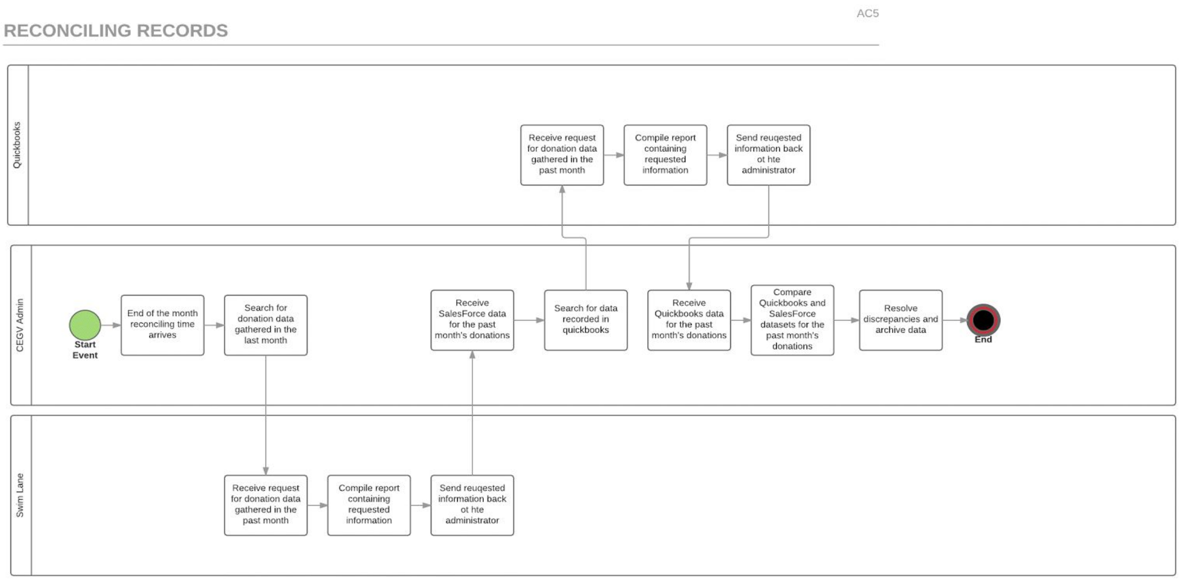
- Salesforce
- Click-and-Pledge
- VerticalResponse
- QuickBooks

The system currently stands as using the low end Salesforce CRM linked with a variety of auxiliary software services. These include a donation facilitation system in Click-and-Pledge, an emailing service called Vertical Response, and Quickbooks for accounting purposes. Donors are contacted through VerticalResponse and when donations are made through Click-and-Pledge, the transaction data goes through the system until records need to be reconciled, reports generated, or account checking needs to be performed. Currently the coalition is faced with a considerable lack of technical skill. The account created with the old version of Salesforce only allows two users on the system which bottlenecks Salesforce usage among members of the team. In addition, there are really only two members who know how and make regular use of Salesforce, which includes Lauren Peterson and one other employee. There are also a number of reliances on external software that have case specific issues which also decreases performance. An example of such an issue is one that keeps them on one account, which stems from the fact that the email lists and email credits for VerticalResponse exist on only one account (Lauren's). Additionally the coalition uses Quickbooks for all their accounting, and the fact that it is separate from Salesforce allows for them to double check their entries to make sure the money counts are accurate. Click-and-Pledge is currently their most valuable external tool, facilitating online donations. Difficulties have arisen due to the disconnect between click-and-pledge and the information outputted by it being fused with existing donor information in their Salesforce database.

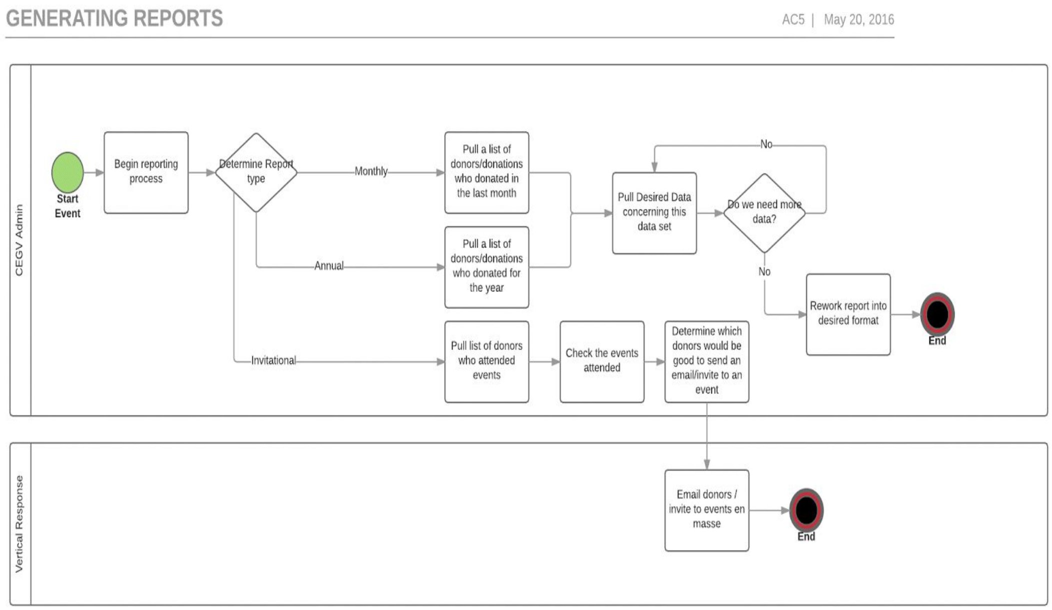
3.2 As-is Process Flows



Explanation: In the current system, the process starts when a donor donates to the coalition online via click and pledge, or donate in person from an event. From here the coalition receives the donor information from click and pledge or on paper. The fund manager checks if the listed donor already exists in their Salesforce database. If the donor is already in the system, the fund manager can go straight to the donor's page, but if the donor isn't in the system, there are a few more steps to get here. For the donor not being in the system, if the donor appears as a temporary contact the fund manager will be given the chance to create a new contact for them or match them to an existing one.

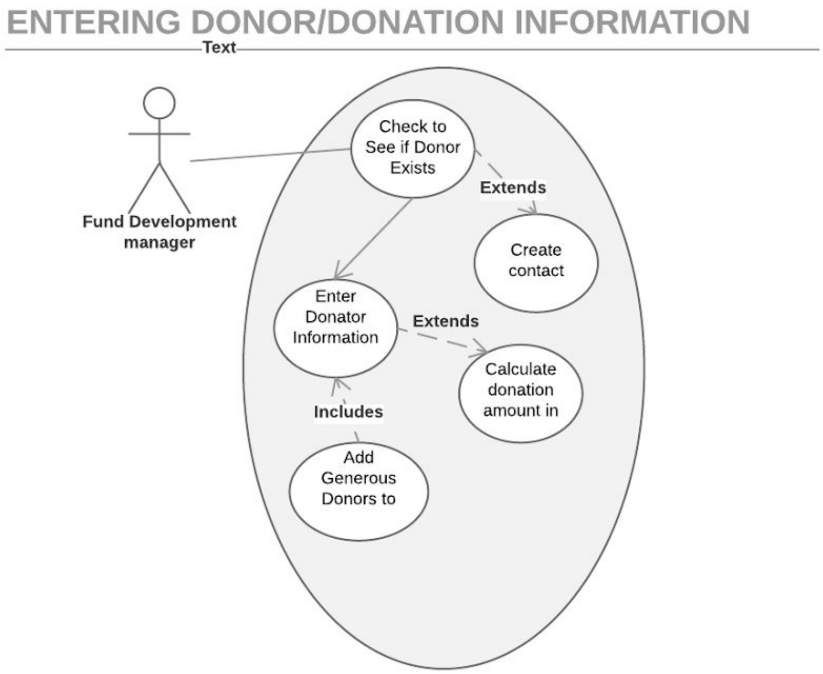


The coalition's current policy for reconciling data consists of a monthly check that occurs between quickbooks and salesforce datasets. As quickbooks doesn't directly link to Salesforce, the coalition needs to make sure that the data contained doesn't contain any discrepancies. This results from pulling data from both Quickbooks and Salesforce and making comparisons by hand. Usually these discrepancies result from either the bank not putting money through resulting in the money not showing up in Quickbooks but appearing in Salesforce, a check donation was not communicated properly and so was not input into Salesforce, or a large donation event was held and donations were not accurately recorded (more common when factoring in cash donations). Reconciling data in this way has shown the coalition that most often issues in consistency are the result of human error although there are various reasons for which this kind of issue occurs. Issues are resolved at the end of the month during this process.



The current system's report generation system is something of an evolutionary process. Lauren, or any potential user of Salesforce can pull various reports from Salesforce with varying degrees of information. Some of these reports only give partial sets of needed data and so many different reports may need to be pulled. Our current understanding of the report generation process involves the Admin beginning the reporting process and determining what type of information is needed. The most common reports pulled are donor lists and donation data over periods of time, such as annual or monthly. As is, the donation reports are generated via Salesforce's saved reporting formats. A common issue is that a perfectly good report does not have all the data needed, in that they (CEGV Admins) *"might have a great report, but it won't let me populate the contact's email address"*. This would result in more querying for the correct needed data. In addition to timely reports, there is also a need for donor information to be pulled, which is typically used for determining which donors should be contacted about events and for promoting purposes. This links to VerticalResponse to send out emails addressed to selected individuals.

3.3 As-Is Use Cases



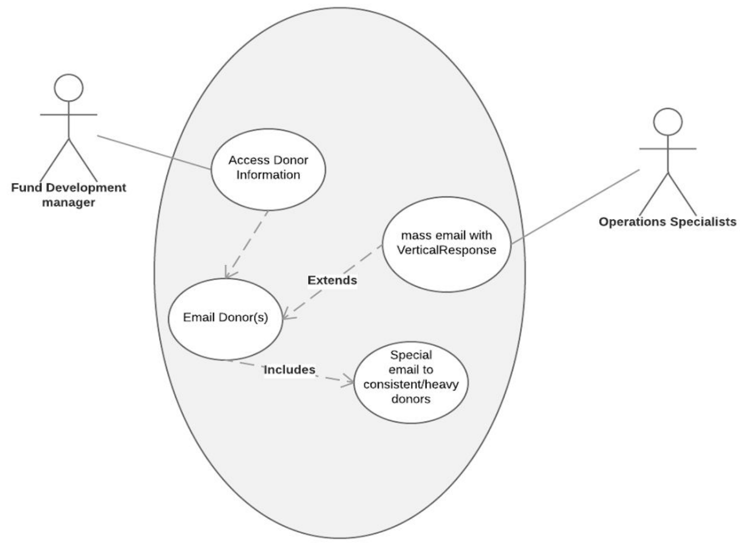
Use Case Title: Creating new donor contact
Actor: Fund Development Manager
Level: White
Stakeholders: Coalition, Donor
Precondition: The donor is not a previously made contact.
Minimal Guarantee: New contact gets created but with limited information such as just name and email.
Success Guarantees: New contact gets created with all needed information provided. (donation amount, date, organization).
Trigger: Manually enter new contact or receive a click-and-pledge event from new donor.
Main Success Scenario:

1. New contact gets created with all needed information such as name, email, phone number, organization, etc.

Extensions:

1. Cannot access internet to get Click-and-Pledge information.
2. Donor enters typo resulting in wrong information.
3. Fund Development Manager enters typo when manually entering information.
4. Donor does not appear as a temporary contact resulting in them being considered an already existing contact.

CONTACTING DONORS



Use Case: Contacting Donors
Primary Actor: Fund Development Manager, Operations Specialist
Level: White
Stakeholders: Primary Actors as well as the whole coalition
Precondition: Donors in system to be contacted (emails/phone numbers)
Minimum Guarantee: Message sent to previous donor/new contact
Success Guarantee: Previous donor/new contact and receives email.
Trigger: Upcoming event, holiday season, campaign within CEGV for donations.
Main Success Scenario:

1. Email(s) gathered
2. Message Written
3. Message sent
4. Message received

Extensions

1. Email fails to send
    a. Resend failed emails
    b. Remove email from listing
2. Only phone number on file
    a. Call number, and either speak directly or leave a message
3. Out of credits on VerticalResponse
    a. Buy more credits
    b. Email one-by-one

3.4 Listing & Analysis of Current IT, People & Process Problems

Currently the IT that the coalition has access to is not optimized for their needs or their system. VerticalResponse, Quickbooks, and Click-and-Pledge all present their own compatibility issues on a day-to-day basis and indeed it is there loss of support that is prompting the coalition to upgrade. IT plays a crucial role but restricts much of what the coalition is capable with and wrestling with the issues is taking up valuable time.

The process patterns in the coalition are fairly strict as manual entry in Salesforce and Quickbooks takes time to be done correctly, but is still error prone. Their process for tracking and emailing donors is complicated by the use of only one account of Salesforce, on an older version of Salesforce that lacks certain features. Report generation is largely a by-hand procedure and this impedes the Coalition's ability to generate meaningful statistic quickly.

The team at the coalition are not tech savvy nor fluent in new software from Lauren's own account. Hard work and a genuine interest to better their skills will be necessary for any changes to take effect. Their team is small and is comfortable with verbal communication in close settings. This may pose a challenge for integrating new system uses as much importance is derived from continual use of a system even if in the short term, it is more convenient to communicate in person.

3.5 Current State Risk Assessment

The coalition faces a serious threat from growth. Donor information is entered by hand, and if they hope to increase donations they will need more reliable methods for tracking donations for more accounting and contacting purposes. The difficulty in using the current system could mean certain opportunities are not taken because the information is not presented in the right way. The data migration itself is risky but that is why it is not up to the coalition to handle, as they seek the help of another non-profit who specializes in data migration. The sensitivity of donor data, including emails, donation amounts, addresses, phone numbers should be of high priority to protect for the coalition. Securing that they have a stable system for years to come is a high priority. Additionally, financial data is currently kept in two locations, Salesforce and Quickbooks, which requires constant reconciliation of data. Currently this takes the form of a manual check performed monthly but this is both time consuming and is prone to user error. Also, as the coalition currently has limited users for Salesforce, any processes and procedures that are currently used by the coalition in utilizing their system is not well documented. This is an issue as there is no easy way for new users to replicated much needed processes and makes the coalition's operations reliant on the individuals who know the needed processes.

3.6 Summary/Conclusion

The coalition's needs as an organization are expansive as currently they possess only a few people using a few features on an underpowered system. Moving forward it will be important for the coalition to consider in great depth how much change they can handle. It may not be the smartest idea to go from mall cop to robocop in even a year. Additionally, it is important that the coalition make sure their changes are geared towards their goals and that a form of maintenance is installed, maybe regular communication with the Salesforce support team, so that they are not put at the whim of Salesforce learning curve or its many features. Overall the coalition has a lot to be excited about but to manage the upgrading of their system, they need also upgrade their procedures, and develop the way they approach each task they do as they learn new ways to help their partners.

4. Future State Analysis

4.1 Future State Overview

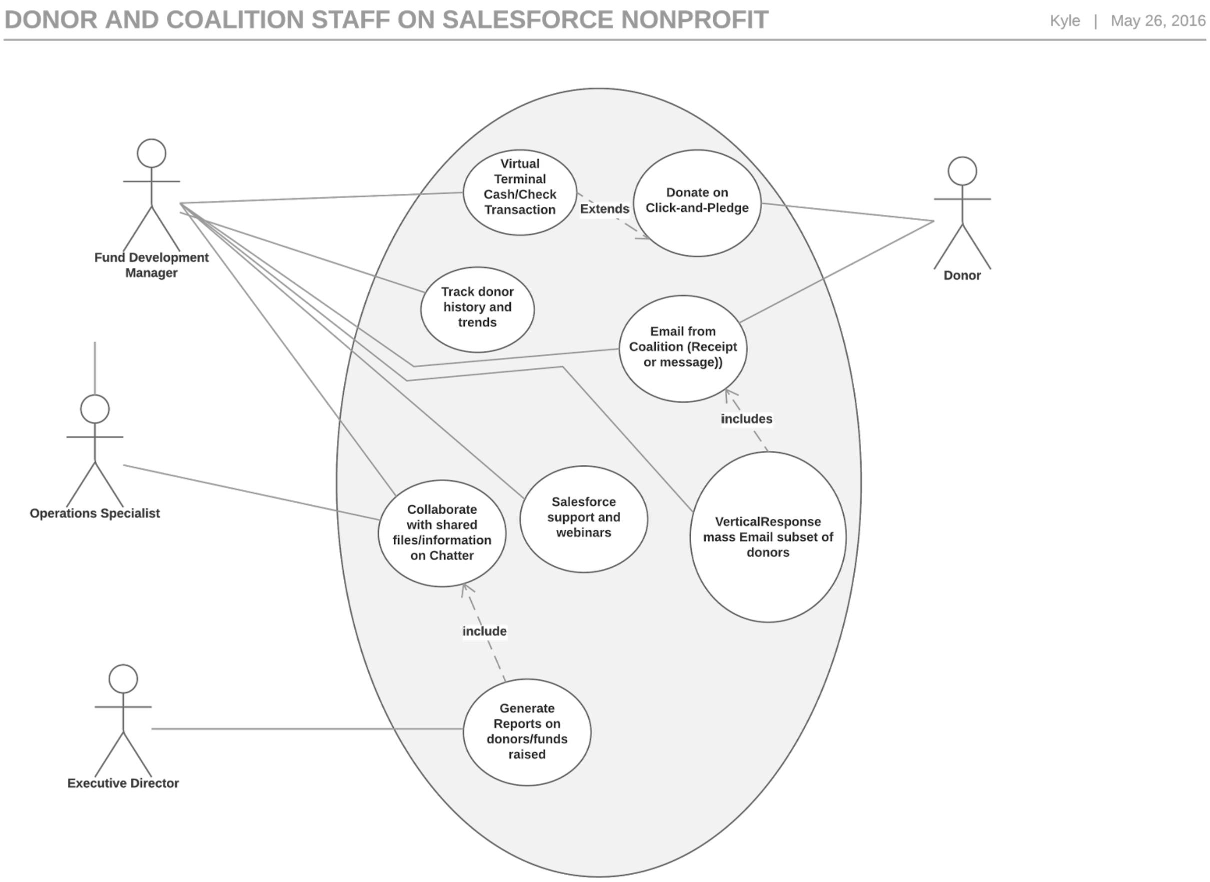
The future state of the coalition is to transition from the current version of Salesforce to Salesforce nonprofit. Salesforce nonprofit will help the coalition track existing donors easier and also help save new donors' information. The coalition will have a more efficient system in Salesforce nonprofit. The system that we are designing for the coalition will include all of the functionality of their current Salesforce setup while introducing a set of tools that we believe will be beneficial for them to use for the future.

Better familiarizing the coalition with Salesforce and any auxiliary software through this new systems design will allow the coalition to make better judgements with their data and ease the processes with which they perform their organization's operations. Keeping the integration of Click-and-Pledge and Vertical Response into the non-profit version will allow the coalition to maintain familiarity with the new set up while keeping the functionality that they need for making donations and sending out mass correspondence. In addition, suggesting different software that links Salesforce to quickbooks will facilitate better accounting practices and decrease workload. This change will affect the workflow concerning accounting by eliminating the need for manual data checking.

4.2 Requirements Listing

- Maintain the capability for the coalition to send out mass emails.
- Maintain the capability for the coalition to track donations.
- Suggest methods of integrating Salesforce and quickbooks.
- Suggest implementation of a data privacy restriction for when volunteers assist with data cleaning.
- Suggest a way for more people in the coalition to use Salesforce (10 licenses with nonprofit).

4.3 To-be Use Cases



Use Case Title: Person makes donation
Primary Actor: Fund Development Manager, Donor
Level: White
Stakeholders: Primary actors, coalition staff.
Precondition: Click-and-Pledge up and running, donor has valid form of payment (credit card, check, cash), connection to Salesforce database.
Minimal Guarantee: Donation is made, name recorded
Success Guarantees: Donation is received, donor is recorded along with name, aliases, organizations, family they are a part of, and information on extra custom questions
Trigger: Person decides to donate online or at an event.
Main Success Scenario:

1. Donor donates online OR in person
2. Donation amount recorded electronically.
3. Recorded also is information about answers to preset questions (customizable)

4. Donor is added to same contact if they have donated before so that their total amount donated is calculated

Extensions:

1. Donor donation fails on website
    a. User is sent back to page where most of their information is there thanks to Click-and-pledge service
2. Donor contact does not exist
    a. Create new contact
3. Donor contact exists but for some reason cannot be found
    a. Add as alias later
    b. Contact-matching service by C&P should avoid this problem 99% of the time
4. Donor wants to create recurring donation
    a. Possible with options in C&P to create recurring donations online.

Use Case Title: Fund Development Manager Tracks and Emails Donor
Primary Actor: Fund Development Manager, Operations Specialist
Level: White
Stakeholders: Primary actors
Precondition: There are donors in the database.
Minimal Guarantee: Emails sent unrestricted to all donors/some donors.
Success Guarantees: Special criteria selects which donors receive emails for events, campaigns, volunteering opportunities
Trigger: Fund Development manager or operations specialist logs on to Salesforce and go to the mailing section.
Main Success Scenario:

1. Employee of coalition logs on to Salesforce and goes to mailing section
2. Chooses from extensive customizable selection choices a list of criteria. For example, all donors who donated last year but not this year.
3. Specialized email to be sent.
4. Sends email.

Extensions:

1. Emails fail to send
    a. Can resend to affected recipients
    b. Send to other emails on file
2. Criteria selected finds no donors
    a. Change criteria to be more open.
3. No credits for mass-emailing service through Vertical Response
    a. Acquire more credits.

Use Case Title: Executive Team Produces Report for Donations
Actor: Fund Development Manager, Operations Specialist
Level: White
Stakeholders: Whole coalition team as well as coalition members.
Precondition: Data tracked on donations is in system.

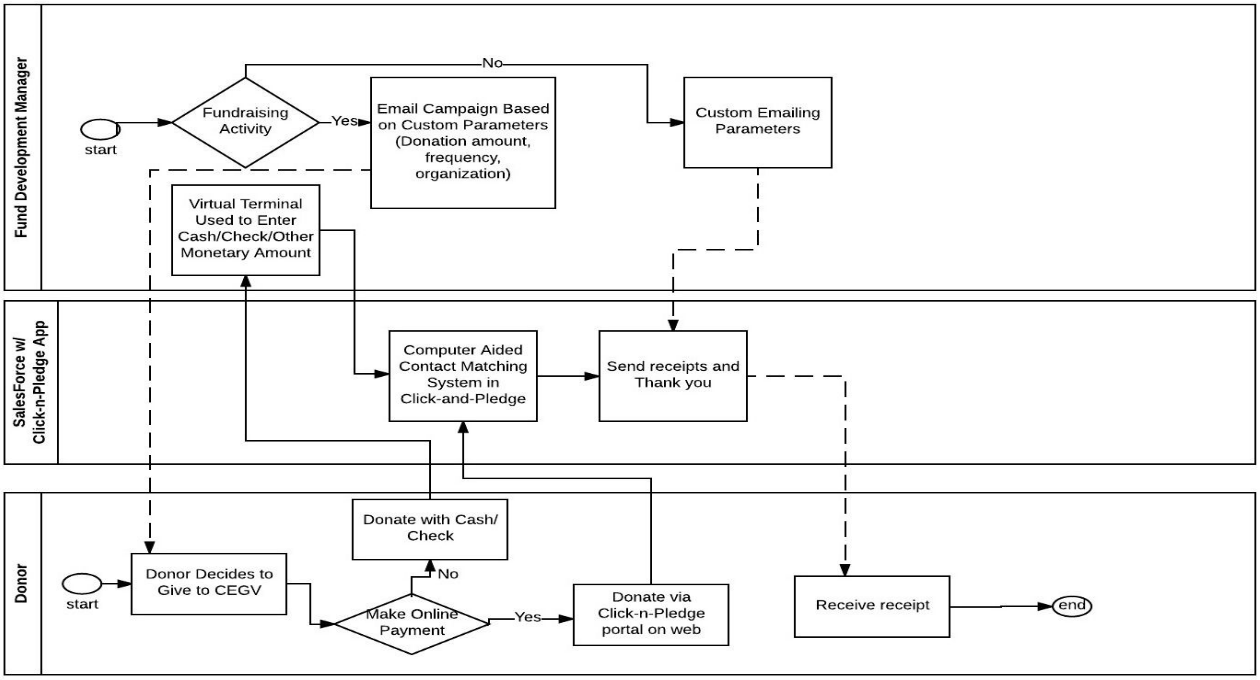
Minimal Guarantee: Report with default settings showing perhaps donations overtime.
Success Guarantees: Specific and customized data showing useful and pointed information like donations from recurring donors, or donation amounts from organizations with corporate matching. Presentations to city council or to CEGV team use reports to boost morale and prove efficacy.
Trigger: Member of coalition goes to "reports" section of Salesforce.
Main Success Scenario:
1. Go to "reports" section
2. Select new report button
3. Select from preset report. Customize as desired
4. Save report. Use report for meetings, presentations.

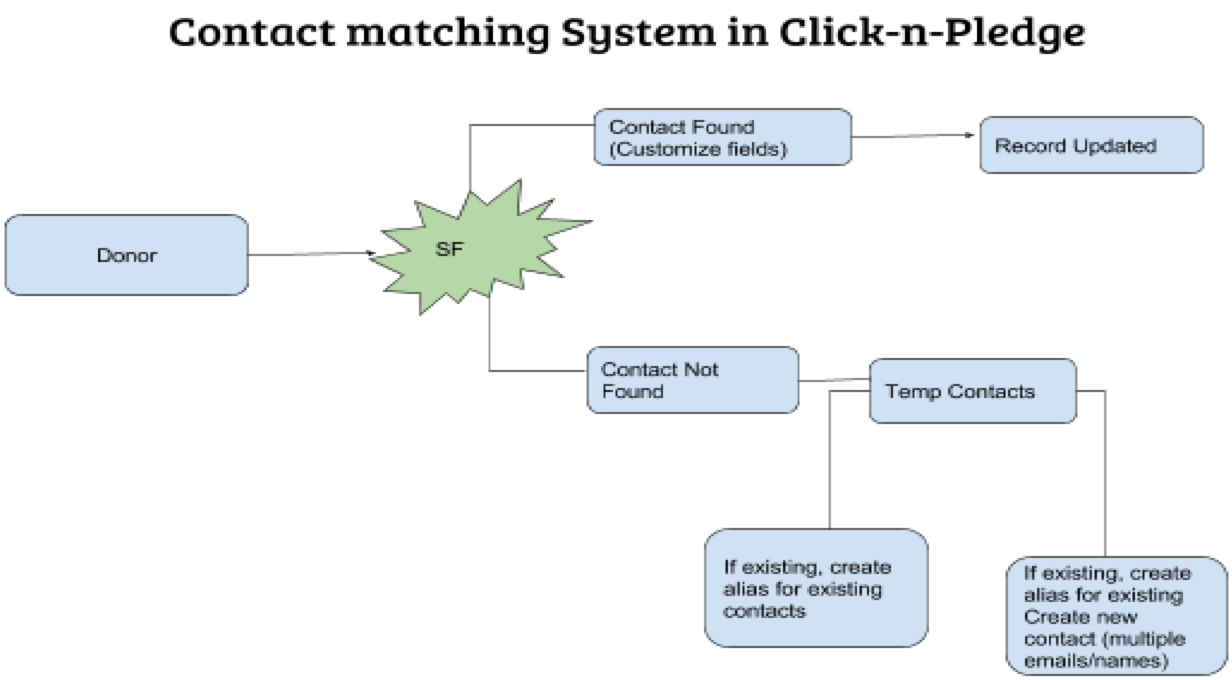
Extensions:
1. No data to report on
    a. Collect donations
2. Report has old data
    a. Regenerate from custom molds of reports

Use Case Title: Files Uploaded to Chatter and Collaborated on/Discussed.
Actor: Fund Development Manager, Operations Specialist
Level: White
Stakeholders: Coalition members, volunteer staff, and members of other groups interacting with chatter
Precondition: All people in need of viewing information and files have Salesforce license or access to public chatter feed with no need for license (limited usability in these feeds)
Minimal Guarantee: Textual information presented to all parties with access to Chatter.
Success Guarantees: Files, discussion of files, edits to files, and all discussions are recorded on the Chatter feed allowing everyone to follow details of the coalition and give feedback. Improving the business evermore.
Trigger: User logs on to Chatter feature of Salesforce
Main Success Scenario:
1. User selects grid-squares in top right of Salesforce Lightning Edition.
2. Select chatter from available apps.
3. View uploaded files, upload files, comment and like current updates. View different feeds

Extensions:
1. Chatter not visible to some members (volunteers without computers for example)
    a. Provide useful updates and contact information on CEGV website

4.4 To-be Process Flows





Explanation: The above process flow highlights what is possible with a fully functioning C&P app in SalesForce Nonprofit. When a person decides they want to donate, they have the option of either donating online or donating in person. Regardless of their donating medium, their credentials which are entered along with their donation are put through the contact matching system implemented in Click-and-Pledge. It allows donations to sync with existing contacts either automatically, or manually be added on to existing contacts as an alias. After donating, much of what used to be a tedious and manual process is done automatically. Updating records of donations is accurate and consistent as it is done always through the C&P system linked to SalesForce. Along with each contact is the data of their transaction including date, amount, name, organization or family, region or age. These custom fields allow the development manager to construct intricate and targeted campaigns of emails. For example, inviting only organization members with corporate matching to an event, or inviting just people who have donated regularly for the last three years to a thank-you dinner. The process ends with a custom receipt message that can be designed to treat particular kinds of donations or donors.

4.5 Functional Design

1. The Development Manager will track the progress of donations by viewing the profile of the donor on Salesforce and looking at the status bar. The Development manager can then confirm the donation as complete once the coalition receives the donation.
2. Any member of the coalition can use the chatter application to communicate. They can post a discussion topic or question and other members can then comment on the post to keep threads easy to follow and find.
3. The Development Manager or other members of the coalition can generate reports of their data.
4. All members of the coalition can use the Salesforce Power of Us feature to get any questions they have about the system answered at any time and can access tutorials and materials that will help them use the system.
5. The Development manager can create and send out mass emails about upcoming events or asking for donations using the Vertical Response application that pulls emails from their data.
6. The Development Manager can also use VerticalResponse to send out thank you emails to recent donors once they have received their donation.

4.6 Recommendations and Alternatives

The coalition will, through the research of over a hundred of undergraduates, have access to countless ideas about apps, processes, and new technology that can increase the efficiency of the coalition and their efficacy to raise money for their cause. That being said, not every idea can be implemented for not every idea is feasible with the level of time, resources, and technological learning-curve that is possible at this time for the coalition. Our first recommendation is that a data migration to Salesforce Nonprofit involving close work with professionals (501 commons) to make sure their current donor information is kept intact. Looking over our solutions to the various issues the coalition faces, we are certain they will agree that the best investment of their time is optimizing the new version of Salesforce to their primary goals. Namely, tracking contacts and recording donations. To this end we would highly recommend the use of apps like Click-and-Pledge donor management, quickbooks, as well as VerticalResponse. It may be best to work with each app one at a time and integrate their functionality slowly. Making donation tracking consistent, email outreach centralized, and donation amounts recorded will put the coalition in a very good place to not only function better, but allow them to grow.

One alternative to using Salesforce nonprofit is Salsa Labs. Salsa Labs is a CRM system that is specifically designed for nonprofits. They allow for easy communication and fundraising within their system. The drawback of this system is that it is designed for smaller companies so if the coalition starts to grow large then they might have to switch to another system that scales with their growth. Salsa Labs would also be a good fit because it incorporates email, mobile, direct mail, face-to-face, and more channels of communication. I would recommend this system as a backup in case the coalition has trouble with Salesforce nonprofit.

A second alternative would be to use Microsoft Dynamics. This is another CRM system but it is not specifically designed for nonprofits. Instead, it is aimed towards mid to large size corporations. They do offer a special pricing plan for nonprofits however. This is the only reason that it stays comparable with the other systems. We would recommend Microsoft Dynamics as a last-resort option because they are not focused on nonprofits so the coalition would probably need to install third-party add-ons to be able to do what the other systems do.

Comparing different CRM systems

CRM Name	Salesforce	Microsoft Dynamics	Salsa
Requirement Green = Great Yellow = Good/Ok Red = Less than Ok			
1. Designed for use by nonprofits	Salesforce nonprofit provides a unified platform to support interactions with supporters, members, donors and volunteers. It provides a way to connect with these important people and will help to provide programs and services to help better connect with the community and obtain more resources.	Not designed for nonprofits but can be obtained at a nonprofit price.	Specifically designed to meet nonprofit needs.
2. Ability to communicate with donors and	Salesforce allows members of the coalition and volunteers to collaborate within the	There are third-party plug-ins for companies to tailor Dynamics to their needs as a nonprofit.	Allows ways to advocate, communicate and fundraise within their system.

external partners	CRM. Salesforce has social intranets that make communication among members easier and more efficient. Salesforce also offers a way to make partner and member communities to make collaboration within these groups easier.		
3. Can scale in size to meet needs for the next five years	Salesforce can help a wide range of nonprofits become more successful. Has been used with large non-profits and smaller non-profits and the pricing for it seems to be within the range of most mid-sized organizations. Can support many users within one organization.	Microsoft Dynamics is aimed for the larger to mid-size companies so it can scale with small nonprofits quite well. Also, it will be receiving future upgrades to make sure that it continues to scale.	Might be good to start but if the organization grows too big then Salsa may not have all of the support and resources needed support it.
4. Able to integrate with other information systems in use throughout the enterprise	Able to integrate with Click and Pledge to make it simple to donors to donate. Able to use other applications for specific forms of communication (Chatter, email lists, etc.). Salesforce also has a variety of cloud options.	Able to be easily integrated with Microsoft excel/outlook and other apps.	Able to incorporate Click and Pledge and direct mail software without any third party apps. This can be done using their online donations app and direct mail/mail merge app.
5. Provides ability to customize reports for very specific needs of different	Allows the user to customize reports and dashboards.	Allows you to personalize customer experiences by engaging them in the right time, right place and right way throughout the	Option to build a custom report to fit the specific needs of your organization.

groups throughout the enterprise		journey. Allows to customize your solutions.	
6. Can track the entire lifecycle of a customer's relationship with the enterprise	Allows a way to track donors from awareness to advocacy. It can be used to reach out to donors, track their donations and involvement over time.	Helps you track all your customer interactions and data. Gives a single place where customer information can be tracked and organized.	Allows tracking of donations with the use of tags, codes and other tools.
7. Widely available on all types of platforms, from client to cloud	Available on both mobile and desktop platforms to make communication easier no matter where or when the users are using it. There are a variety of cloud options.	Offer multiple platforms which include desktop and mobile. Offer dynamics in the cloud, on-premises, or a hybrid combination.	Cloud-based platform that offers fundraising, marketing, and online advocacy software.
8. Can be customized by in-house developers or can be used by consultants for customization	Salesforce provides ways for organizations to customize it. Allows organizations to customize applications in Salesforce.	Can be used by consultants to add third-party integration/customization. Example is InfoStrat.	Salsa allows some customization but not to the level of Dynamics or Salesforce.
9. Has a wide user base and lots of information available for technical support	Salesforce has a community support called The Power of Us that provides users with resources, training resources, ways to connect with people in the Salesforce community, etc. It provides a way for the users to get	It is one of the top used CRM products on the market. Has a huge technical support backing in Microsoft. Has a section dedicated to community forums as well as specialists.	They have an online forum section where users can post questions for other users or professionals to answer. They also have live demos and walkthroughs on their website.

	help and connect with Salesforce employees.		
10. Easy to use, intuitive user experience for all types and levels of user expertise	The Power of Us support system provides training and training resources to help organizations adjust to using the software.	User reviews say it is fairly easy to use. In addition, there are videos/demos online available for reference.	User reviews say that it is easy to use and there are helpful demos online.

4.7 Future State Risk Assessment

1. Some to most of the employees at the coalition have little to no technology experience which means that making the switch to the newer version of Salesforce and training all of the employees to use it might be difficult
2. Even after training, the employees may not feel comfortable enough with the new system to use it and may stop using Salesforce and go back to their old ways in which they are comfortable.
3. Volunteers and staff will also have to be trained to use these new methods of collecting pledges: card swipe transactions, and the cash/check terminal. This could cause incorrect data collection during first uses.
4. Salesforce going down for any reason would be a problem because it would restrict any access the coalition has to their data for a period of time.
5. There is a possibility of data loss during the migration from Salesforce to Salesforce Nonprofit or the data may not correctly be moved over into the new system.
6. Using a cloud based system could pose some security risks for the donor's and member's data.

4.8 Summary Conclusion

After analyzing the risks and projected benefits for the coalition to migrate from their current version of Salesforce to the updated version of Salesforce Nonprofit, we believe that the migration to the new version of Salesforce Nonprofit will improve the way that the coalition tracks donors and donations and will make reaching out to donors easier. Updating to the newest version of Salesforce Nonprofit will significantly cut down if not completely eliminate the need to manually enter donor and donation information. The new system will also allow the coalition to take advantage of features that allow for easier and better communication between members and with donors. The migration will ensure that the coalition's data will be more up-to-date and accurate and will cut down on the amount of time spent managing their data which will in turn save them the money and resources they were spending to manage the data.

5. SDLC Implementation

5.1 Implementation Strategy

For success in this system upgrade the data migration should of course be conducted by professionals, like 501 commons so that their existing list of donors are maintained. Our team recognizes that although there are many good ideas in this document and others, it is just as poor a situation for the coalition to have half-implemented solutions, to no solutions at all. That is why we recommend careful implementation in a stepwise fashion.

The coalition should first seek to secure a data migration by running Salesforce Nonprofit in parallel. Having both systems online will be useful for continuing operations while learning the ins-and-outs of the new Salesforce. To that end there are an abundance of resources (See Salesforce resources below). Guaranteed tech support and webinars are offered to nonprofits as part of the service to assist in creating custom objects and fields to better track donors. Up to 10 licenses for the Nonprofit version means that two or three personale can be trained. Moving forward there may be a need for a dedicated IT professional. After Salesforce Nonprofit has been installed and can perform as well as the current system, the old system should be shut off and the coalition should seek to install Click-and-Pledge from the app exchange.

Installing Click-and-Pledge is easy as they just install both “Payment as a Service” and then “Donor Management Tools” and log into Click&Pledge on SalesForce by navigating through the apps icon in the top right. Once there, use of Click-and-Pledge can be mastered through the webinars and resources listed below (See app resources). Tools like the virtual terminal, which allows for physical donations (in the form of cash and checks) and the customizable questions on their donation screen will increase the amount of data the coalition has to work with. For example, questions like, “How did you hear about us?” and “Would you be interested in group volunteering events” will increase the efficacy of the coalition and their ability to guide their decision making processes.

Integrated use of Quickbooks and VerticalResponse is possible and desirable as the coalition has experience and trust in these softwares, and seeing as one of the prime catalysts for this upgrade was the threat of discontinued app support, it makes sense that the coalition make use of these services. In the apps section are links to the apps which, similar to C&P, can be downloaded and then accessed in the apps section of SalesForce. Once there, set up is quick and resources for instructions abundant.

Resources:

Salesforce:

SalesForce Webinars

Power of Us Hub

App:

Click-and-Pledge:

C&P Library (Download first)

Donor Management Tools

C&P Manual w/ Webinars

Other Apps

Workato Quickbook Integration

VerticalResponse Integration

5.2 Risk Management for Implementation

Acknowledging the risks projected for the future state, there are various steps that the coalition can take to minimize risk impact and help manage the future state. For example, in order to mitigate the negative effect of the learning curve that will be required by the to-be implemented technology, ensuring that the coalition recognizes the availability of online tech support will play a key role in limiting the effect that the lack of technological background will have for this project's implementation. Additionally, the concern that the system users will regress to their former methods of operation in lieu of the newer procedures suggested by this project can be combatted by promoting that the coalition members together and assist each other in adapting to the new changes. This will alleviate the difficulty associated with learning a new system and solidify the new processes in the coalition's infrastructure.

Another related issue is that of the projected human error that will occur when volunteers and staff use the technologies that they have only recently been trained to use. The new methods of collecting pledges and completing transactions have the potential to lead to data entry errors, and this can be addressed by performing routine checks on the data recorded in order to maintain data integrity. These checks will not need be as frequent or arduous as the data reconciliation seen in the currently used system and will therefore be easier and simpler to handle.

In order to ensure that the data being accumulated by the coalition will not be lost in the event that SalesForce were taken down for whatever reason, regular backups of the data should be made in order to preserve the current standing of the coalition. As finances will be linked to quickbooks, the financial state of the coalition can be preserved as Quickbooks will not be affected by the downtime of SalesForce. The restriction of access will pose a problem to the coalition until SalesForce returns to full functionality but the backups will allow the coalition to function in a minimal state.

The strategy of maintaining regular backups carries over to the issue of data loss during the migration from SalesForce Enterprise to SalesForce Nonprofit. In the event that the data is not imported correctly, there will be a saved state of the data before the migration which the coalition and the entities assisting in the data migration can roll back on. Additionally, it would be wise to implement the change while maintaining the current system such that the data migration can be verified as being complete and secure. The migration itself can only be performed carefully, and management of the risk of data loss will need to be implemented as a plan that enables re-entry of past data in the case of migration failure.

One more consideration is the issue of data security concerning the donors who contribute to the coalition’s cause. As the coalition does collect payment information, this data is at risk, especially in a cloud based storage structure. The best way to manage the risk of data exposure or hacking is to work with whatever information technology specialists are available to ensure that the data is being protected from a cyber attack. As long as the coalition keeps track of who has access to the data stored in their system and limit access based on users, the coalition will be able to work towards protecting their data.