

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

The Helping Hands Foundation project requires a Salesforce-based solution to streamline the management of volunteers, donations, and events. The primary needs identified include:

- Tracking volunteer details, skills, and availability.
- Recording and monitoring donations with amount, date, and donor details.
- Organizing events and associating them with volunteers.
- Maintaining transparency and generating reports for stakeholders.
- Ensuring secure access based on roles.

Stakeholder Analysis

Key stakeholders in the Helping Hands Foundation include:

- CEO: Oversees the overall operations and ensures alignment with the organization's mission.
- CFO: Manages financial aspects, donation tracking, and compliance.
- Financial Officer: Records transactions, monitors donation flow, and ensures proper allocation.
- Donation Manager: Handles donor engagement, donation collection, and donor relations.
- Volunteer Coordinator: Manages volunteer recruitment, assignments, and scheduling.
- Donors: External stakeholders providing financial support.
- Volunteers: Community members who actively participate in events and initiatives.

Business Process Mapping

The current manual processes include:

1. Volunteers register via paper forms or spreadsheets.
2. Donations are tracked manually in ledgers or Excel files.
3. Event planning and volunteer assignments are managed over phone calls or emails.

Proposed Salesforce Solution:

- Volunteers can be registered in Salesforce with their availability and skills.
- Donations are logged in Salesforce and linked to donors and volunteers.
- Events are created in Salesforce with capacity, location, and date, and linked to volunteers via a junction object.
- Automation rules ensure approvals, notifications, and reminders are triggered.
- Reports and dashboards provide real-time visibility into donations and volunteer activities.

Industry-specific Use Case Analysis

Non-profit organizations, like Helping Hands Foundation, face challenges in managing large amounts of donor and volunteer data. Common industry challenges include donor retention, transparent reporting, and efficient resource allocation. Salesforce Nonprofit Success Pack (NPSP) is a popular industry solution, offering capabilities like donor management, household tracking, and grant management.

For Helping Hands Foundation:

- Donor management ensures donor history and preferences are maintained.
- Volunteer management ensures events have adequate staffing.
- Donation transparency builds trust among stakeholders and encourages repeated contributions.

AppExchange Exploration

AppExchange, Salesforce's marketplace, provides pre-built solutions for nonprofits. Relevant apps include:

- Nonprofit Success Pack (NPSP): Tailored for donor and volunteer management.
- Classy for Salesforce: Helps with fundraising campaigns.
- Volunteers for Salesforce: Streamlines volunteer scheduling and hours tracking.
- FormAssembly: Simplifies data collection via online forms.

Exploring these solutions can accelerate implementation by leveraging best practices and reducing custom development efforts.