Salesforce – Donation NGO Management

Industry: Non-Profit / NGO Services
Target Users: NGOs, Donors, Fundraising Teams, Campaign Managers
Project Type: Salesforce CRM Implementation

Problem Statement

NGOs often face challenges in managing donor data, tracking contributions, and ensuring transparency in fundraising campaigns. Manual processes result in lost donor information, inefficient campaign tracking, and limited visibility into impact measurement. This reduces trust among donors and affects NGO efficiency. The Salesforce Donation NGO Management system addresses these issues by automating donor registration, tracking donations, managing fundraising campaigns, and generating impact reports to support accountability and transparency.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Business Needs
- Streamline donor registration and management.
- Track donations and contributions across campaigns.
- Automate alerts for upcoming fundraising events.
- Provide dashboards for donor engagement and campaign performance.
- Enhance transparency with impact and financial reports.

Functional Requirements
- Automated donor registration and unique Donor IDs.
- Contribution tracking with donor history.
- Alerts for new campaigns, milestones, and donor recognition.
- Dashboards for donation trends and campaign analysis.

Non-Functional Requirements
- Scalable for small and large NGOs.
- Secure handling of donor and financial data.
- User-friendly for NGO staff and volunteers.
- Reliable automation for reports and alerts.

2. Stakeholder Analysis

- Donor: Registers, contributes, and tracks donation impact.
- NGO Manager: Oversees campaigns, donor engagement, and fund allocation.
- Fundraising Team: Plans and manages donation campaigns.
- System Admin: Manages Salesforce configurations and reports.

3. Business Process Mapping

Current Manual Flow
- Donor data stored in spreadsheets or paper records.
- Limited follow-ups and recognition for donors.
- Campaign tracking is manual and prone to errors.

- Transparency issues due to lack of consolidated reporting.

Proposed Automated Flow in Salesforce
- Donors registered with unique IDs, contributions tracked automatically.
- System sends confirmation and recognition emails to donors.
- Dashboards show donation trends, active campaigns, and impact reports.
- Automated alerts ensure donors stay engaged with upcoming campaigns.

4. Industry-Specific Use Case Analysis

- Small NGOs: Simplify donor tracking with low-cost automation.
- Large NGOs: Manage multiple campaigns and donor bases efficiently.
- International Aid Organizations: Ensure global transparency and accountability.
- Fundraising Teams: Automate alerts and maximize donor engagement.

5. AppExchange Exploration

- Nonprofit Success Pack (NPSP): Specialized NGO donor management.
- Fundraising Apps: Manage donation campaigns and events.
- Reporting & Analytics Tools: Provide donor and impact insights.
- Decision: Use Salesforce-native tools (Flows, Reports, Dashboards, Apex) for flexibility.