Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Pain Points (NGO side)

- **Manual donation records (Excel/Email) are prone to errors**
  Most small to mid-scale NGOs don’t have a centralized system to track and maintain donations. Staff manually input records in spreadsheets or maintain bank receipts in email threads. This can cause:
  - Wrong inputs (human error)
  - Difficulty in tracking recurrent donors
  - Wastage of resources and time
- **Lack of transparency leads to donors dropping off after one-time donations**
  Donors often don’t receive closure on how their money was used, only acknowledgments with receipts. This reduces trust and forces NGOs to spend extra time finding new donors.
- **No unified donor history makes personalized communication difficult**
  Scattered donor information prevents NGOs from identifying high-value donors. Mass emails often feel generic, and opportunities for targeted campaigns are missed.
- **Difficult to measure program impact (funds and beneficiaries)**
  Linking donations to actual outcomes is hard due to manual tracking, subjective observations, or delayed reporting. Donors cannot easily see impact reports.

Pain Points (Donor side)

- **No visibility into how their donation is used**
  Donors only receive receipts, not detailed impact reports, which reduces trust.
- **Lack of regular communication/updates**
  NGOs engage donors mainly around donation events, with little ongoing communication.
- **No personalized experience, treated as “transactional”**
  High-value donors or donors with specific interests do not get tailored communications.

Project Requirements

- **Centralized donor management system**
  Data must be stored in one place, not scattered.

- **Automated donation receipts, acknowledgments, and impact updates**
  Improves process feasibility, reduces time, and minimizes errors.
- **Donor dashboards showing personalized impact reports**
  Connects with donors psychologically and represents their individuality.
- **Fundraising campaign management & donor segmentation**
  Segregates donors for special attention to VIPs.
- **Transparent reports for management & stakeholders**
  Allows stakeholders to see fund flow and impact in real-time.

2. Stakeholder Analysis

Primary Stakeholders

- Donors (Individuals/Corporates)
- Fundraising Managers
- Program Managers (NGO staff)
- NGO Leadership/Board Members

Secondary Stakeholders

- Payment Gateway Providers
- Volunteers/Field Officers
- Auditors/Regulators

Stakeholder to Salesforce Org Representation Mapping

Stakeholder	Type of User	Profile/Role	What They Do	Access & Permissions
Donors (Individuals / Corporates)	External Users	Portal Profile: Donor	Log in to donor portal to see donations and impact	- Access to Experience Cloud site- Read-only access to their own Donation records- Read-only to their own impact dashboards- Can update their contact info
Fundraising Managers	Internal Users	Profile: Fundraising Manager	Manage donation campaigns, segment donors, follow up with leads	- Full CRUD on Donor, Donation, Campaign objects- Run reports & dashboards- Approve large donations- Limited edit access on Program & Beneficiary (read-only mainly)

Stakeholder	Type of User	Profile/Role	What They Do	Access & Permissions
Program Managers (NGO Staff)	Internal Users	Profile: Program Manager	Manage programs and beneficiaries, link funds to impact outcomes	- Full CRUD on Program and Beneficiary- Read access to Donation & Donor- Can upload beneficiary updates and outcomes
NGO Leadership / Board	Internal Users	Profile: NGO Leadership (Read Only)	View fundraising performance, donor growth, compliance reports	- Read-only access to all data- Full access to executive dashboards- No record editing
Volunteers / Field Officers	Internal Users	Profile: Field Officer	Collect on-ground data about beneficiaries	- Create/Update Beneficiary records- Read-only on Program- No access to Donor personal data
Payment Gateway Integration	Integration User (API only)	Profile: API User	Post payment data into Salesforce as donation records	- No UI login- Access to create Donation records via REST API- Read-only access to Donor object
Auditors / Regulators	External Users	Portal Profile: Auditor	Periodically review donation and program records for compliance	- Read-only access to Donation, Program, Beneficiary data- Access to selected reports & dashboards via Experience Cloud site

3. Business Process Mapping

Current (As-Is)

- Donor makes donation → staff logs in Excel → acknowledgment email sent manually → no structured follow-up → impact reporting delayed quarterly/annually.

Future (To-Be with Salesforce)

- Donor makes donation via website → Salesforce auto-creates record → thank-you email triggered instantly → funds linked to specific campaign/program → donor dashboard updated → periodic automated impact updates → management dashboard updated in real time.

Key Mapped Processes

- **Donation Capture Process** (Web/Social/Offline → Salesforce record)

- **Fund Allocation Process** (Donation → Campaign → Beneficiary)
- **Donor Engagement Process** (Acknowledgments, updates, retention workflows)
- **Reporting Process** (Dashboards for donors, managers, leadership)

4. Industry-Specific Use Case Analysis (Non-Profit Sector)

- NGOs are shifting toward impact-driven donor engagement because donors expect clarity on "where did my money go?"
- Recurring donation programs are growing and require automation for monthly contributions.
- Corporate Social Responsibility (CSR) compliance requires accurate reporting on fund utilization.
- Salesforce Nonprofit Success Pack (NPSP) supports many non-profit use cases but needs customization for impact-tracking dashboards and LWC donor portals.

5. AppExchange Exploration

A free Salesforce package created specifically for NGOs. It provides a pre-built data model for nonprofits, saving time and offering built-in reports/dashboards. Custom objects can be added to enhance features.

Recommended Packages / Plugins

- **Nonprofit Success Pack (NPSP):** Pre-built nonprofit data model (Households, Donations, Recurring Gifts)
- **Donor Management Apps:** Causeview, DonorPerfect connectors
- **Payment Gateway Connectors:** Stripe, PayPal integrations
- **Document Management:** Conga Composer, DocuSign for receipts and tax forms