# Phase 1: Problem Understanding & Industry Analysis

## 1. Requirement Gathering

- **Pain Points (NGO side):**
    - **Manual donation records (Excel/Email) are usually prone to errors**: most small to mid scale NGOs don't have a centralized system to track and maintain the donations. The staff manually inputs the records in spreadsheets or maintains bank receipts in email threads. This can cause situations like, wrong inputs (human error), difficulty in keeping track of recurrent donors or wastage of resources and time due to manual way of things.
    - **Lack of transparency leads to donors dropping off after one-time donations**: many times donors donate money but don't really get a closure as to where the money went/is used, all they receive is an acknowledgement attached with a receipt. This can make potential donors feel disconnected and discouraged. The trust that should have been developed, isn't. This results in the NGOs spending additional time on finding new potential donors.
    - **No unified donor history makes personalized communication difficult**: with scattered information about donors, NGOs cannot identify high-value donors. They send out mass emails which may result in generic bulk emails on the donor's side. Moreover, opportunities for targeted campaigns are missed.
    - **Difficult to measure program impact (funds and beneficiaries)**: if NGOs are unable to efficiently link donations to actual outcomes due to reasons like, manual, subjective observations or delayed reportings, then it becomes hard to prove their accountability. Donors cannot see the impact reports because the NGOs struggle to make them.
- **Pain Points (Donor side):**
    - **No visibility into how their donation is used**: Donors only receive receipts and not detailed reports into how their donations helped make an impact. The trust isn't established.
    - **Lack of regular communication/updates**: NGOs only communicate with donors when they ask for donations or after receiving donations. There is usually little to no engagement at other times.
    - **No personalized experience, treated as just "transactional"**: High-value donors don't get the special attention they deserve or donors who prefer to

support a specific cause (like education vs healthcare) still get blanket appeals for all programs.

- **Project Requirements:**
  - Centralized donor management system: data must be stored in one place, not scattered.
  - Automated donation receipts, acknowledgments, and impact updates: process feasibility is increased and time as well as error is significantly decreased.
  - Donor dashboards showing personalized impact reports: represent donor individuality and connect with them on a psychological level.
  - Fundraising campaign management & donor segmentation: helps segregate donors on various factors and allows NGOs to provide special attention to identified “VIPs”.
  - Transparent reports for management & stakeholders: allows stakeholders to see the money flow and its 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 their 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) |
| 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 to Salesforce record).
- **Fund Allocation Process** (Donation to Campaign to 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 **“where did my money go”** clarity.
- **Recurring donation programs** are growing and they need automation for monthly contributions.
- **Corporate Social Responsibility (CSR)** compliance requires accurate reporting on fund utilization.
- Salesforce Nonprofit Success Pack (NPSP) already 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 gives a pre-built data model for nonprofits. It saves time, provides built-in reports/dashboards and we can further add custom objects to enhance the features. Further, we can explore plug-ins like,

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