FINAL PROJECT REPORT

SalesForce Data Migration Project

AA4

2016/6/03

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EXECUTIVE SUMMARY

This report outlines our business plan for addressing issues with the update of SalesForce for the Coalition Ending Gender Based Violence. This project was motivated by concerns that the version of SalesForce will soon no longer be supported. This document includes the current state, which outlines how SalesForce is currently being used and the use cases of these processes, as well as the future state, which outlines the requirements of the new system, how the processes of using this system will change, which system we will use, and a risk analysis of our proposed solution.

The Current State outlines the existing processes involved with using SalesForce, as well as the different actors involved in the process, the roles they play, the risks and the problems associated with these processes. Problems associated with the current system include data duplication, fields are not rolling up properly, underutilization of SalesForce, and shared accounts based on dependent systems (i.e. Vertical Response). With the current dependency on third party applications to complete key business processes, our solution sought to minimize system change and integrate dependent systems when possible.

The future state analyzes how our proposed solution will be implemented, requirements of the proposed system, the design of the proposed system, risks associated with the design, possible alternatives to the proposed solution, the result of the proposed solution implementation, and the changes it will produce within the current state of the system and its processes. Our proposed solution aims to use the up to date version of SalesForce Enterprise Edition and integrating the Nonprofit Starter Pack as a part of the system upgrade. We also propose ways to implement mass emailing within SalesForce, more effective integration between SalesForce and external systems, automatically check for duplicate data, increase board involvement, and automate many currently manual processes.

OVERVIEW

CLIENT OVERVIEW

Our client is Lauren Peterson, who is the Fund Development Manager at the Coalition Ending Gender Based Violence (CEGV), a 501(c)(3) nonprofit whose mission is to end gender based violence through collective social action. This is accomplished through collaboration with member organizations, facilitating training and technical assistance, policy advocacy, and promoting community outreach. Their strategic priorities include expanding its coalition, integrating prevention for clients, and increasing member participation. Currently, they have approximately 30 member organizations and over a dozen individual members in the King County area. As capacity grows, they hope to facilitate expansion through diversified revenue streams and by growing their human resources.

PROJECT OVERVIEW

Our task is to analyze the current processes that Lauren is using at CEGV, particularly with how she handles donor, member, and event registrant contact information and marketing. Lauren is currently using an outdated version of SalesForce to handle this information that is no longer supported by the SalesForce Foundation. Our goal is to plan how 501 commons will have her data migrated into the SalesForce Nonprofit Starter Pack. Our team will be giving the coalition a current state assessment based on current processes related to members, donors, and event registrants. We will also provide a future state assessment of how the new version of Sales Force should be used, recommendations for how these processes, and grant management, can be improved, and how dependent systems (VerticalResponse, Click & Pledge, and QuickBooks) could change with the implementation of the new system.

CURRENT STATE ANALYSIS

CURRENT SYSTEM OVERVIEW (IT)

CEGV currently uses a version of SalesForce that was acquired in 2008 for managing donor, event, and other marketing activities. The coalition uses VerticalResponse in order to send out specific email lists to different groups. Currently, when a donation comes through via Click&Pledge, Lauren receives an emailed receipt that she cross checks in SalesForce in order to ensure that the donation has been associated to the donor card. She is currently manually entering donor information that Click & Pledge is unable to track, as well as cash and check donations that involve manually entering contact information. These data get entered twice in SalesForce and Quickbooks, and the reports that are generated do not always include all the data that Lauren requires.

AS-IS PROCESS FLOWS

The current processes that mainly involve SalesForce are donor management, member management, event management, and report generation. The current process for donation management begins with receiving a donation, whether it be online, cash, or check. Lauren receives a notification of a donation via email from Click & Pledge. Lauren then goes to SalesForce and searches for the new donor by name. If the donor is already in the system, Lauren can go directly to their contact's page. If it is a cash or check donation, or the account is not already in the system, Lauren can create a new permanent contact, or match the new donor to an existing contact. Either way, Lauren would then go to that person's contact page, and access the "Opportunity" tab, and change necessary settings within the contact. For example, she must make sure the Organization is "Individual" and change the date for this gift to update contact's "Gifts this Year", as well as verify that they are assigned to the correct campaign (i.e. "Celebration for Change 2016," "Individual," "Workplace giving," "Board Giving 2016," "Sponsorship 2016," "Major Donor 2016" etc).

The current process for event management is similar to donation management. The only difference is that the person is automatically entered into an event (i.e. the "Celebration for Change 2016 campaign"), which is then verified by Lauren. Account information is also uploaded to VerticalResponse, where several email lists are used for mass emailing.

The current process for member management is by maintaining a campaign (i.e. "2016 Campaign") with a list of member organizations, while also maintaining a list of individual staff members for each organization in a VerticalResponse email list. Members register through Click & Pledge or Form Desk, both of which are converted into SalesForce accounts and added to their respective campaigns.

Reports are generated from donor, member, and event data, which is pulled directly from SalesForce through a set of pre-specified fields (time period, type of data, etc). Another process that involves SalesForce is Accounting of Donations. This involves Administrative Staff members generating a report in SalesForce, and manually checking it against corresponding QuickBooks data.

✓ The described processes are illustrated in Process Flow Diagram that can be found in appendix 1.

AS-IS USE CASES

✓ Use Case Diagrams can be found in appendix 2.

Use Case Title: Register New Coalition Member
Primary Actor: Operations Specialist, SalesForce, Click & Pledge, and Form Desk
Level: Blue
Stakeholders: Coalition staff and board members
Precondition: Member Organization is affiliated with CEGV's mission and has been contacted
Minimal Guarantee: Member is registered via Click & Pledge or Form Desk
Success Guarantees: Member is registered and has paid membership fee
Trigger: Click & Pledge or Form Desk form is completed by individual/organization
Main Success Scenarios:

1. Registration is received through Click & Pledge, and account is created automatically in SalesForce.
2. Payment is received, and new member is added to appropriate campaign (e.g. "2016 Campaign) in SalesForce.

Extensions:

1. Registration is received through Form Desk, and member account information is manually inputted is into a new account in SalesForce.
2. Member is added to membership email list in VerticalResponse, which contains individual staff members at each organization.
    a. New additions may also funnel in through events/workshops. Adding in this case requires manually adding them to this email list.
3. Payment is not received, and Operation Specialist must negotiate with member to find alternative payment methods (scholarships/grants).

Use Case Title: Event Registration
Primary Actor: Fund Development Manager , SalesForce
Level: Kite
Stakeholders: Coalition staff and board members , event sponsors
Precondition: Individual has received email/in-mail/phone call about event
Minimal Guarantee: Individual has RSVP'd on the event page.
Success Guarantees: Individual has been added to appropriate campaign in SalesForce.
Trigger: Fund Development Manager receives email receipt
Main Success Scenario:

1. RSVP status and individual information is sent to SalesForce.
2. Fund Development Manager verifies this user has an existing account in SalesForce database by searching registrants name.

Extensions:

1. Individual contributes/sponsors the event, and the donation is received via the “receiving donations” use-case.
2. Individual does not have an existing account
    a. Temporary account is created upon registration.
    b. Fund Development Manager verifies account.
3. Individual exists with a different email
    a. Fund development manager matches new email with existing account.

Use Case Title: Pull Reports
Primary Actor: Fund Development Manager or Operations Specialist, SalesForce
Level: Blue
Stakeholders: Coalition staff and board members, member organizations
Precondition: Event/Campaign information has been stored in SalesForce
Minimal Guarantee: Report is generated with most of the necessary information present
Success Guarantees: Well-structured and up-to-date report is generated that contains all necessary information.
Trigger: Event/Campaign/Donor information is needed for presentation/analysis
Main Success Scenario:

1. Fund Development Manager or Operations Specialist enters SalesForce
2. Time period is selected (month/year).
3. Type of report is selected (event/campaign/donations/members).
4. Type of data is selected (contact information/attendance lists/donor lists/member lists)
5. Report is generated in SalesForce.

Extensions:

1. All necessary fields are not provided by generated report
    a. Generate different reports and merge necessary fields manually into one report.
2. Report is used in presentations to board members or member organization.
3. “Donation Accounting” use case if report is “Donations by month by campaign” and it is the end of the month.
4. Donor report is pulled and surprising trends are discovered.
    a. “Contacting Donors” use case to communicate trends/ask for more donations.

Use Case Title: Contacting Donors

Primary Actor: Fund Development Manager, Donor, VerticalResponse

Level: Blue

Stakeholders: Coalition staff and board members

Precondition: Individual is a "Super Donor" or "Major Donor"

Minimal Guarantee: Donor has been contacted

Success Guarantees: Donor responds and expresses interest in donating further

Trigger: Fund Development Manager wants to gain feedback, invite donor to event, update donor on news at the Coalition, or send a thank you.

Main Success Scenario:

1. Newsletter/Invitation/Thank You is sent via VerticalResponse email list.
2. Donor responds with interest in donating.
3. Communication between donor and Fund Development Manager occurs through "Donor Notes"
4. Donation is received through "receiving donations" use case.

Extensions:

1. "Donor Notes" information is inaccurate.
   a. Verify new information through alternative communication methods (call/in-mail)
2. Newsletter requires information from Executive Director.
   a. Contact Executive Director through standard organizational procedures.
   b. Compile newsletter.
   c. Send via VerticalResponse.
3. Donor does not show further interest in donating
   a. "Pull Reports" use case to investigate possible causes.
   b. Follow-up via "Donor Notes" to investigate possible causes.

Use Case Title: Receiving Donations

Primary Actor: Fund Development Manager

Level: Blue

Stakeholders: Coalition staff and board members

Precondition: Individual has been reached via email/in-mail /call

Minimal Guarantee: Individual has donated before, during, or after an event

Success Guarantees: Individual has donated, exists in SalesForce Database, and is assigned to the appropriate campaign.

Trigger: Fund Development Manager receives email receipt or direct payment

Main Success Scenario:

1. Fund Development Manager receives Click n' Pledge email receipt.
2. Fund Development Manager verifies that donor is already in SalesForce database.
3. Fund Development Manager verifies the donor is assigned to the appropriate campaign.
4. Fund Development Manager goes to "Opportunity"
    a. Verifies that "organization" field is set to "individual".
    b. Updates "Gifts this Year".

Extensions:

1. Donation arrives via cash/check.
    a. If donor account exists in SalesForce database, manually update "Gifts this Year" field.
    b. If donor account does not exist, manually create one, and update "Gifts this Year" field.
2. Donation is from a company that offers donation matching:
    a. Follow that company's policy for receiving matched donations.
3. Donor is not in SalesForce Database:
    a. Temporary account will be created.
    b. New account is verified.
    c. Proceed to steps 3-4 on "Main Success Scenario".
4. Update list of "Superheroes" and "Major Donors" as needed.
5. Update "Donor Notes" for individual donors whose information may have changed.

Use Case Title: Donation Accounting

Primary Actor: Administrative Staff Member, Fund Development Manager, Operations Specialist, SalesForce, QuickBooks

Level: Kite

Stakeholders: Coalition staff and board members; Federal Government

Precondition: Donation has been received by the bank and updated in QuickBooks.

Minimal Guarantee: Donations have been placed and exist in SalesForce.

Success Guarantees: Donation information is identically catalogued in both QuickBooks and SalesForce.

Trigger: It is the end of the month.

Main Success Scenario:

1. Fund Development Manager or Operations Specialist enacts "Pull Report" use case for "Donations by month by campaign".
2. All primary actors verify that QuickBooks donations match SalesForce.

Extensions:

1. QuickBook records do not match SalesForce

a. Information is verified through standard procedures.
b. QuickBooks is manually adjusted.

CURRENT IT, PEOPLE AND PROCESS PROBLEMS

- Currently using the Enterprise Edition instead of Nonprofit Edition, which is limiting functionality and increasing costs.
- Several instances of data duplication
- Although there are two regular VerticalResponse and SalesForce users, one account for each of these is used by both of the users.
- Salesforce is underutilized since it is primarily used for creating email lists and generating simple reports, and only two members of the Coalition use it regularly.
- QuickBooks records must be manually checked with Salesforce records each month.
- SalesForce is integrated with VerticalResponse, but the regular log-in is preferred equally and used inconsistently.
- "Gifts this year" and other fields are not updated automatically in SalesForce.

CURRENT STATE RISK ASSESSMENT

- The current system is outdated and is not getting the latest software/security updates.
- Lack of automatic updating of certain records leads to data insecurity.
- Difficulties transitioning members and workers onto the correct emailing list
- Absence of documentation regarding how to use Salesforce hinders future opportunities to train new members/other future users. Could be a greater risk if CEGV expands its human resources.
- There are multiple identical contacts in the system that causes work for volunteers in the form of data clean up.
- Multiple users on the same SalesForce and Vertical Response accounts poses security risks.

SUMMARY/CONCLUSION OF CURRENT STATE

In conclusion, we plan to assess the implementation of SalesForce for Nonprofit that will be used by 501 Commons to perform the data migration from the old instance of SalesForce to the SalesForce Nonprofit Starter Pack. This plan will include a transition strategy that would be used be used as a guide for future implementation. The outdated system of SalesForce used by the CEGV will soon no longer be supported by SalesForce. Implementing the current version of SalesForce Nonprofit will solve this problem and also offer many other benefits such as greater functionality with extensive features and plugins that are discounted for nonprofits. The new system will offer robust features that will provide for all data management needs of CEGV.

FUTURE STATE ANALYSIS

FUTURE STATE OVERVIEW

The future state of the Coalition Ending Gender Based Violence SalesForce processes migrates to the updated version of SalesForce for Nonprofits. The system planned for implementation focuses on eliminating Vertical Response, integrating QuickBooks and SalesForce, and utilizing Chatter in order to make processes more fluid. Our proposed solution relies on CEGV using SalesForce AppExchange to implement the necessary apps in order to increase the efficiency of the Coalition.

FUNCTIONAL DESIGN

We propose for the Coalition to use the Salesforce for Nonprofits in order to optimize the everyday processes within the company related to managing donors, volunteers, events, and grants. Although the Coalition is currently using Salesforce, their version is out of date and at risk of numerous issues. By upgrading the Coalition to the newest version, we can ensure that the Coalitions needs are met including ease of use for members. With Salesforce, we propose the Coalition to use things such as AppExchange, donation tracking, and donor, grant, event, and volunteer management.

Salesforce for Nonprofits is a specific Salesforce software designed for nonprofit organizations. It allows nonprofit companies to see major functions of their company as well as providing connectivity between them all. These major functions include connecting donors, volunteers, employees, and other programs. This helps nonprofit companies, such as the Coalition, to raise donations, deliver better products and resources to those that need support, and communicate more effectively and efficiently with members and supporters.

MEMBER MANAGEMENT

The Coalition also needs support with managing specific member organizations. Currently, they have no way of adding members through an integrated system. Instead those who are interested with becoming a member contact the Coalition and request membership. We propose for the Coalition to use SalesForce to create and add members through the management software included in the software package. By also adding members to Chatter, they can share files, automatically update contact information, and facilitate greater member organization collaboration through groups that are working in similar fields/projects.

DONATION TRACKING AND DONOR MANAGEMENT

The Coalition has expressed their desire to have an easier way to track and manage donations within Salesforce. Currently, issues with the current system include repetitive data as well as time consuming processes of having to insert and cross check data. With the implementation of the new Salesforce, donation tracking will be extremely simplified. In Salesforce, donation tracking is automatic, eliminating redundant data as well as freeing up large amounts of time for employees. This creates a completely standardized way for the Coalition to track donations by providing built-in donation validating, data cleaning, and integration tools that allow better processes. These integration tools can be used for things such as donation pages, campaigns, and even apps for managing events.

GRANTS MANAGEMENT

The new Salesforce includes automation and real-time analytics. These things help with holding and accessing grant information for tasks like managing and reporting. Some of the biggest tools Salesforce has to offer the Coalition is the ability to customize the workflows they have in order to specifically relate to organizational processes they may have. It also will provide the Coalition with the ability to track grant budgeting and manage them more effectively because of the automation and analytics Salesforce provides.

VOLUNTEER MANAGEMENT

Another important requirement from the Coalition is help with volunteer information tracking. They wish to be able to track volunteer information as well as track when volunteers have helped in the past. Salesforce has automated systems that hold this information in order to create simpler and faster tracking. Salesforce has the ability to save volunteers as contacts, as well as with other members of the Coalition. Abilities, skills, availability, and past volunteering are all tracked as fields in the volunteers contact. Volunteer opportunities can also be added into Salesforce in order to register volunteers with specific shifts, times, and locations. All the shifts for events and volunteer jobs are also available on a calendar view in order to make it easier to view what shifts have and have not been filled. Then volunteers can go online and see all available shifts and register for a time. This is also automatically updated in all the Coalitions systems.

EVENT MANAGEMENT

Similar to other ways tracking is done across Salesforce, the Coalition can use this in order to track and manage events easily. New events can be created and posted within Salesforce for supports to view. From there, Salesforce can automatically update the system when attendees RSVP so seating charts can even be created. Summary reports of each VIP attending can also be created to give to nonprofit employees to allow for better conversation with them. Click & Pledge will be used simultaneously used with the systems Salesforce has to offer for events. Creating new events, payment processing, as well as contact matching for events will be done in Click & Pledge. In order to ensure that Click & Pledge works properly by making sure software is up to date and integrated properly.

APPEXCHANGE

Lastly, AppExchange is a huge store where the Coalition will be able to find business applications that will help them with specific business needs. Unlike other resources, these apps are specifically made to be used with Salesforce to provide companies with the capabilities to extend and add different applications they may need. One of these applications will be a QuickBooks integration app so the Coalition can share data and information to Salesforce and QuickBooks. Therefore, Salesforce can add different installments continually to keep up with expansions and growths and even changes in needs within the Coalition.

REQUIREMENTS LISTING

- Salesforce shall provide the ability to create custom reports.
- Salesforce will allow for efficient donation tracking.
- Salesforce should automatically update a donor's profile when donating through Click & Pledge.
- Salesforce will be able to provide efficient, non-redundant information.
- Salesforce should provide a straightforward way to compare data between Salesforce and QuickBooks.
- Salesforce will be able to receive the latest software and security updates.
- Salesforce shall maintain an accurate listing of information on all memberships.
- Salesforce will be properly integrated with Click & Pledge to create custom events.
- Salesforce will provide interactive sets of data through the use of dashboards.
- Salesforce shall scale through all of CEGV's member organizations.
- Salesforce will provide a system to backup files.
- Salesforce will have training documentation for employees to access.
- Salesforce will provide an efficient way to contact and handle volunteers.

TO-BE USE CASES

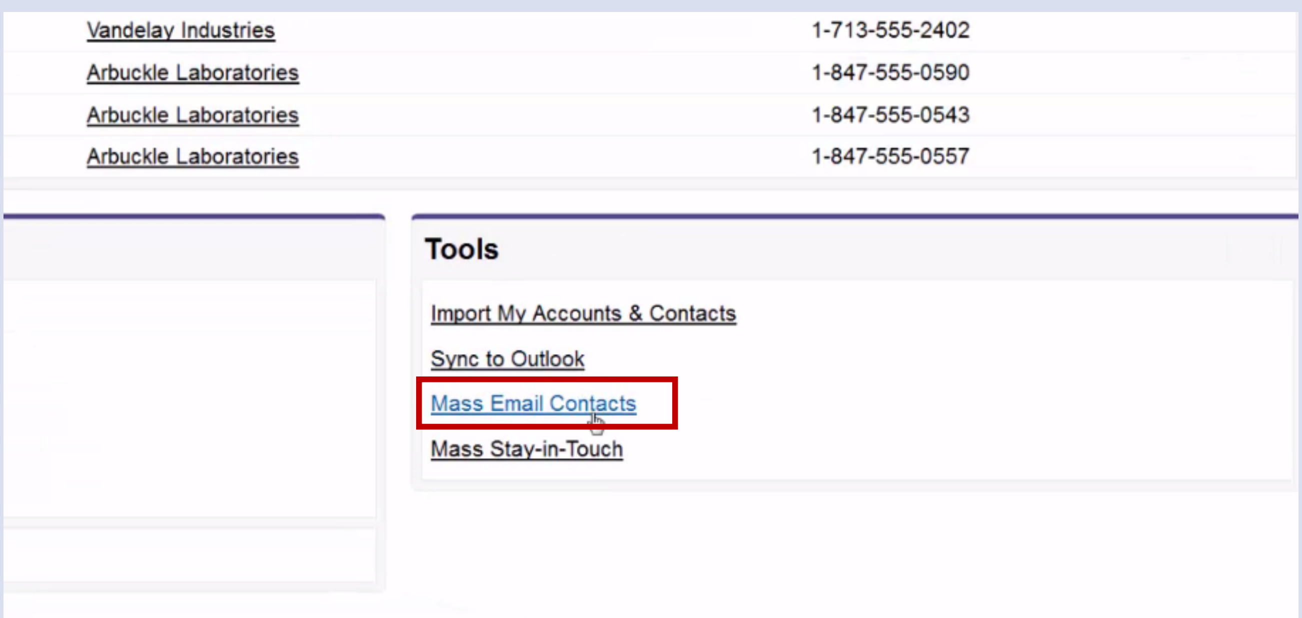
✓ Use Case Diagrams can be found in appendix 3.

Use Case Title: Mass Emailing
Primary Actor: Coalition Member, SalesForce
Level: Blue
Stakeholders: Coalition staff and board members
Precondition: Email templates have been saved into SalesForce.
Minimal Guarantee: Email has been sent.
Success Guarantees: Email has been sent with all needed participants included.
Trigger: A Mass email must be sent for an event, quarterly communications, or other specified situation.
Main Success Scenarios:

3. Coalition member selects target recipient (members of a campaign, member orgs, donors, etc) after navigating to the "Mass Email" menu.
4. Coalition member selects appropriate template and edits email for the specific circumstances.
5. Email is sent.

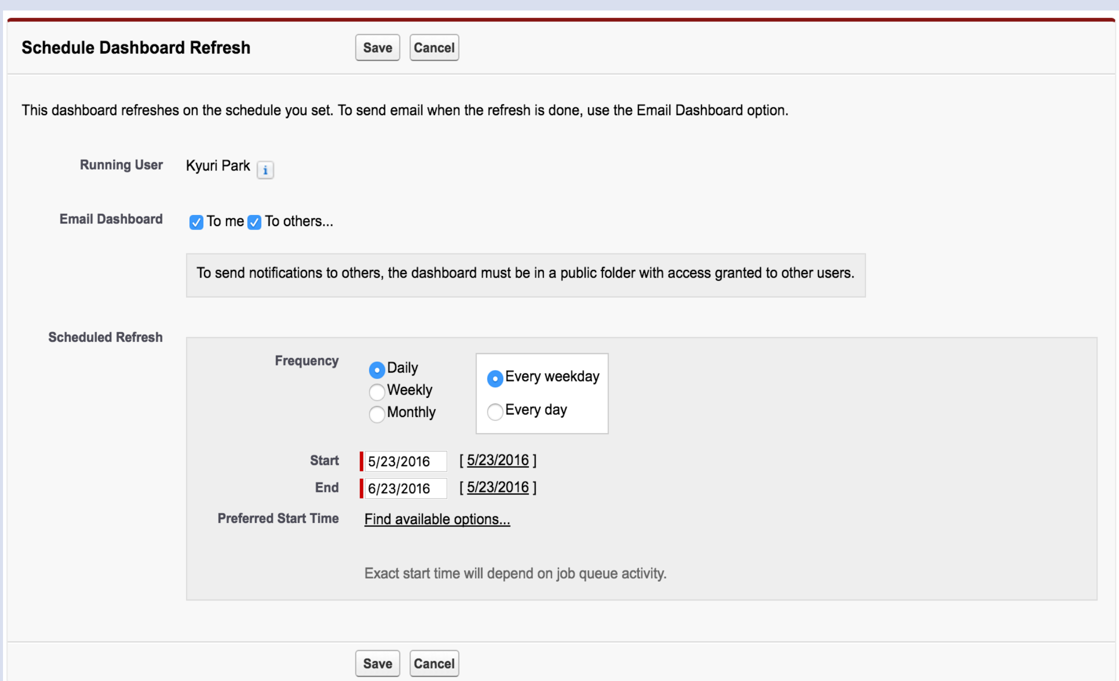
Extensions:

4. Email template does not exist.
    a. Create new email template



Use Case Title: Sharing Dashboards
Primary Actor: Coalition Staff Member, SalesForce, Coalition Board Members
Level: Blue
Stakeholders: Coalition staff and board members
Precondition: Dashboard has already been created and is worthy enough to share with Board.
Minimal Guarantee: A dashboard is shared among coalition staff and board members.
Success Guarantees: Dashboard is shared as soon as updated.
Trigger: CEGV wants to make reporting to Board easier.
Main Success Scenario:

1. Coalition staff member create a folder to share
2. Share the folder
    a. Share the folder with one of two people
    b. Share the folder with more than two people
    c. Share the folder by role
3. Schedule dashboard refresh
    a. Set daily
    b. Set weekly
    c. Set monthly
4. Active 'Email Dashboard' option



Extensions:

4. Board members do not have SF accounts
    a. Prepare Dashboard:
        i. Coalition staff member prints the dashboard out
        ii. Coalition staff member scans the copy of the dashboard
        iii. Coalition staff member downloads
        iv. Coalition staff member screenshot
    b. Share via email or Chatter
2. The dashboard does not have to updated periodically.
    a. Acquire dashboard as-needed without scheduling refresh.

Use Case Title: Add Member to Chatter Community

Primary Actor: Operations Specialist, Other CEGV Staff Member, SalesForce, Chatter

Level: Blue

Stakeholders: Coalition staff and board members, CEGV constituency, member organizations

Precondition: Coalition member has set up a Chatter Profile and has already been registered as a member in SalesForce.

Minimal Guarantee: Coalition member has been added to overall “Member” group in Chatter

Success Guarantees: Coalition member has been added to “Member” group, as well as appropriate subgroups that are structured by project/related field.

Trigger: Member has registered

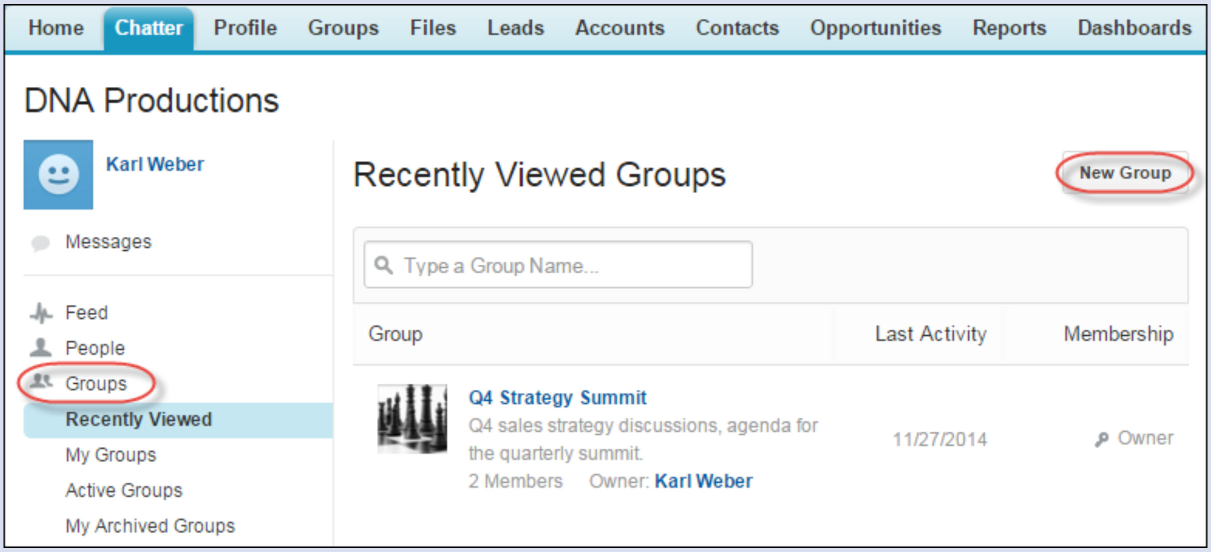
Main Success Scenario:

6. Operations Specialist sends Chatter Free license to new member’s email.
7. Operations Specialist then adds this member is to “Members” Chatter group, which is is an unlisted group with all Member organizations.
8. Operations Specialist emails description of new member to other CEGV Staff member (i.e. Systems Coordinator or Project Manager) who will offer recommendations on which subgroup to add this member.
9. Operations Specialist adds member to Chatter subgroup based on recommendation.

Extensions:

5. Subgroup that new member belongs to does not currently exist in Chatter.

b. Operations Specialist creates this group and adds new member to it.



Use Case Title: QuickBooks Reconciliation

Primary Actor: Fund Development Manager, Operations Specialist, SalesForce, QuickBooks

Level: Blue

Stakeholders: Coalition staff and board members

Precondition: Sandbox, test, and deployed QuickBooks integration. Coalition member has set up a QuickBooks and Salesforce account.

Minimal Guarantee: Coalition member has installed Salesforce QuickBooks integration application

Success Guarantees: Coalition member has successfully integrated QuickBooks and Salesforce information and data

Trigger: It is the end of the month and QuickBooks must be reconciled against SalesForce.

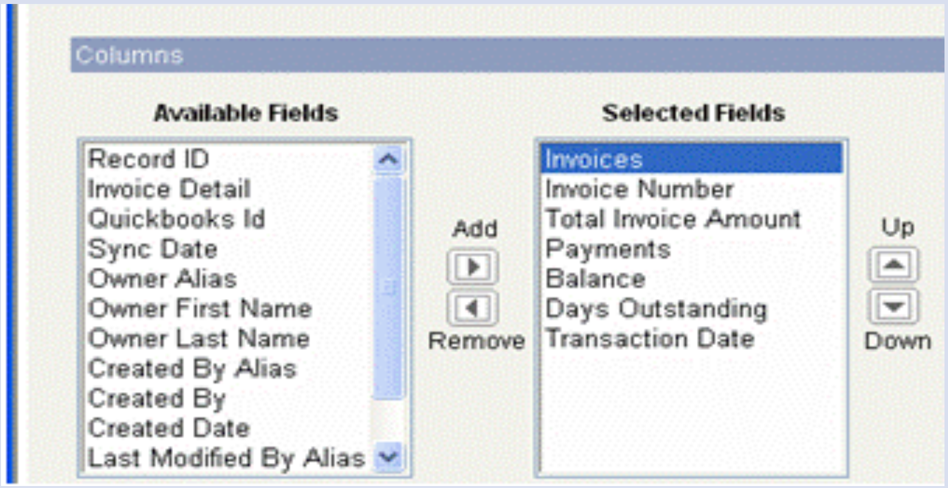
Main Success Scenario:

5. Find SalesForce/QuickBooks integration app on AppExchange.
6. Create opportunities and recipes in order to begin integrating.
7. Create invoice in QuickBooks and SalesForce.
8. Update QuickBooks
9. Send Updated QuickBooks to Operations Specialist for review.
10. Records match.

Extensions:

2. There is a discrepancy between SalesForce and QuickBooks.

a. Operations Specialist and Fund Development Manager discuss offline until a resolution is reached.



Use Case Title: Getting information on volunteer

Primary Actor: Coalition staff member

Level: Kite

Stakeholders: Volunteer, Salesforce, Coalition

Precondition: There is an active Salesforce account with access to volunteer information.

Minimal Guarantee: The coalition staff member is able to view all volunteers.

Success Guarantees: There is a profile for the volunteer that is filled out.

Trigger:

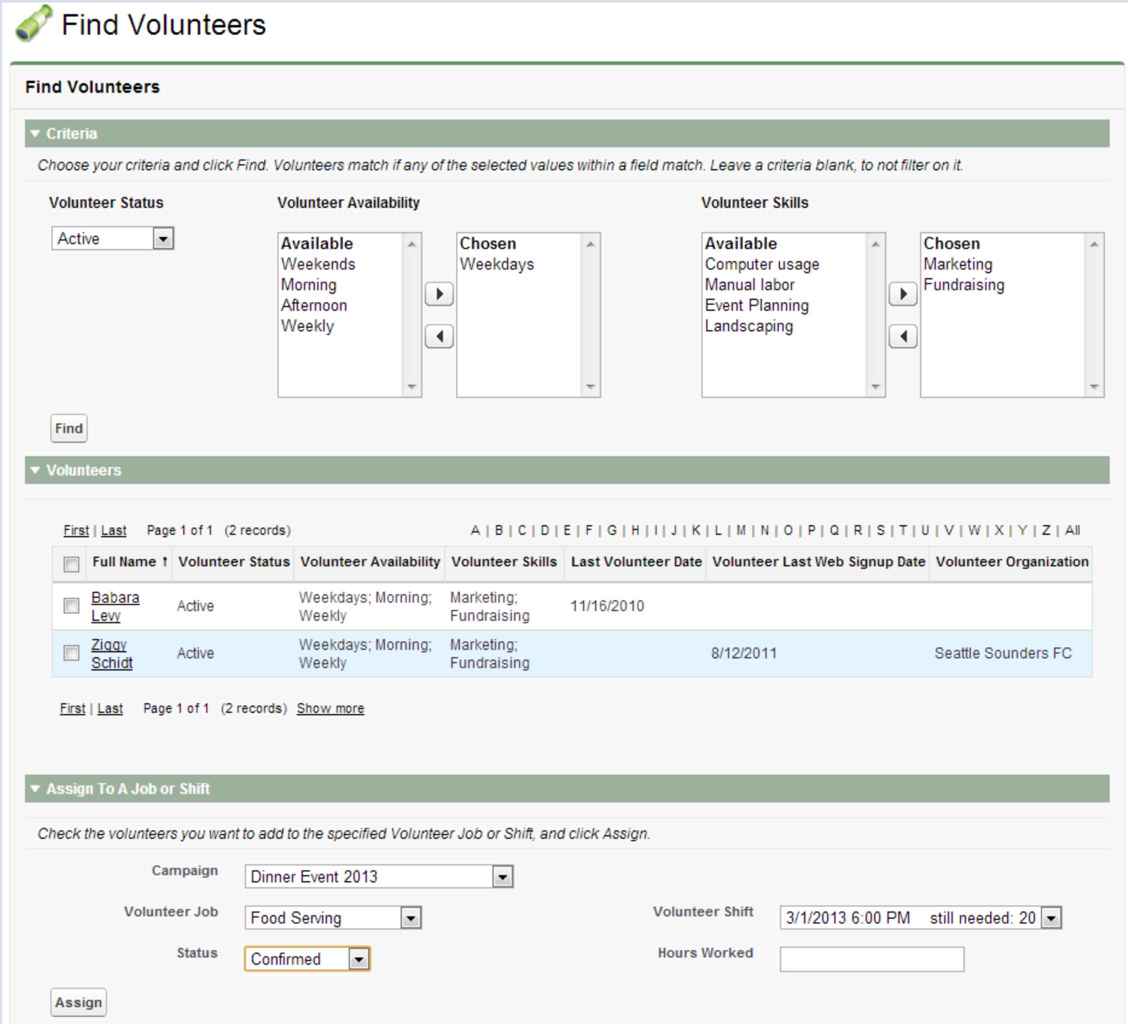
1. An upcoming event that requires volunteers is happening soon.
2. A volunteer's profile needs to be updated
3. A new volunteer wants to help the coalition

Main Success Scenario:

5. Navigate to the volunteers page.
6. Find specific volunteer.
7. Edit or schedule volunteer.

Extensions:

6. Staff member is nor in the system.
   c. Create a new volunteer profile.
   d. Fill out profile with status, availability, skills, etc.



Use Case Title: Create a New Grant

Primary Actor: Fund Development Manager, SalesForce

Level: Blue

Stakeholders: Coalition and board members

Precondition: The Coalition has been approved to receive a grant.

Minimal Guarantee: Grant has been created

Success Guarantees: Grant is a lump sum and is accounted for.

Trigger: Received a new grant

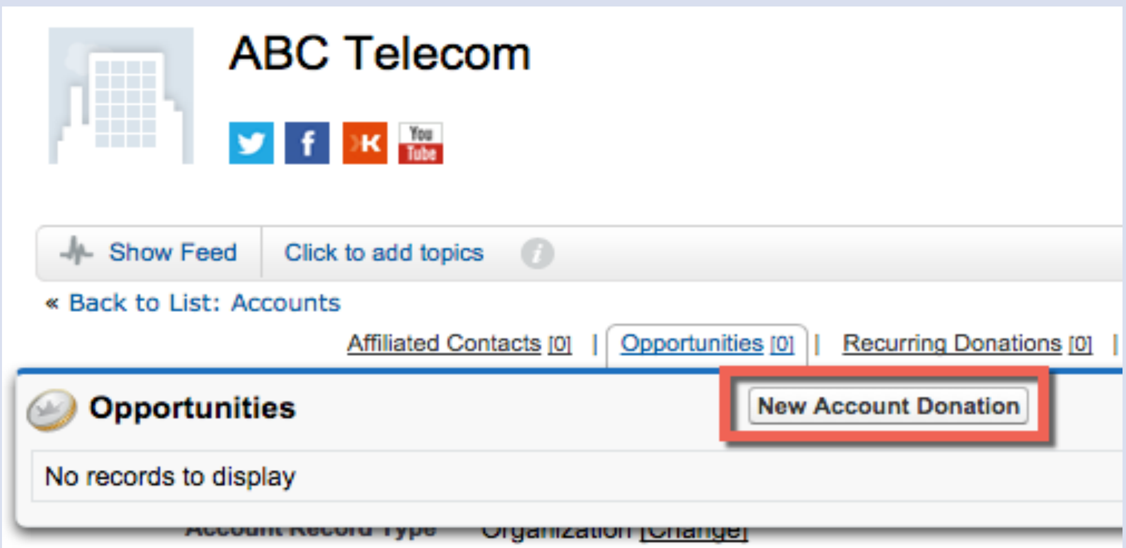
Main Success Scenario:

3. On the “Opportunities” tab, click “New Account Donation”.

4. From the list of record types, select "Grant".
5. Opportunity and Account name will be automatically filled. All other fields should be entered manually.
    a. Request Amount - the amount you are requesting for the grant.
    b. Stage – select Prospecting.
    c. Close Date – select a date that indicates when you expect to receive the grant.
    d. Campaign, Grant Requirements Website, Grant Program Area(s) – enter if appropriate.

Extensions:

2. Grant is recurring.
    a. Modify "Close Date" field accordingly.



Use Case Title: Sandboxing
Primary Actor: Coalition Member, SalesForce
Level: Blue
Stakeholders: Coalition staff and board members
Precondition: User has a SalesForce account.
Minimal Guarantee: Data backups and application can be tested.
Success Guarantees: Data backups and application can be deployed in the Coalition.
Trigger: There is a need for testing within the Coalition.
Main Success Scenarios:

1. "Sandboxes" is accessed from setup using the Quick Find box.
2. New Sandbox is created with a name, description, and type.

3. Data to be tested is selected.
4. Sandbox is initialized over the period of a few minutes to days depending on size.
5. Email confirmation is sent to Coalition member after sandboxing has been completed.

Use Case Title: Data Backups
Primary Actor: Operations Specialist, SalesForce
Level: Blue
Stakeholders: Coalition staff and board members
Precondition: User has a SalesForce account.
Minimal Guarantee: Data has been scheduled for backup.
Success Guarantees: The data has been successfully backed up to a cloud service.
Trigger: Wanting to back up the data.
Main Success Scenario:

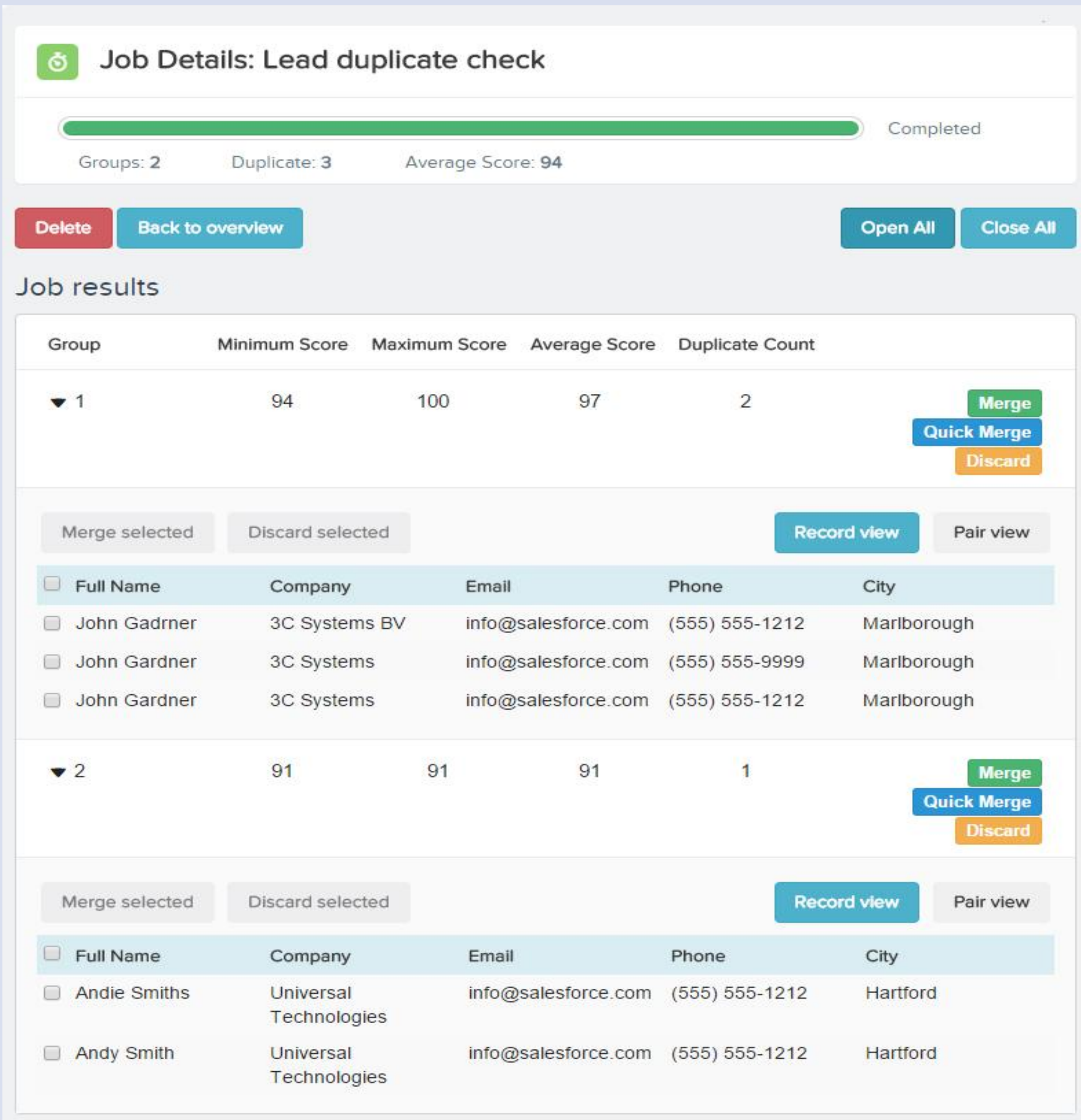
1. Open SalesForce, and click the "Setup" tab.
2. Enter "Data Export" in the "Quick Find" box.
3. Select "Schedule Export".
4. Enter desired backup items.
5. Receive email confirmation with a link to retrieve backup files.
6. Upload file to an organized cloud storage for backups.
    a. Links provided for backup download will expire after 3 days.

Extensions:

1. Data must be backed up urgently
    a. Steps 1-2
    b. Select "Export Now"

Use Case Title: Merge Duplicate Records
Primary Actor: Coalition staff member, SalesForce, Duplicate Check
Level: Kite
Stakeholders: Coalition staff and board members
Precondition: Duplicate Check has been installed and setup in SalesForce
Minimal Guarantee: Duplicates have been found.
Success Guarantees: All duplicate records have been merged.
Trigger: Scheduled/Informal data maintenance period is occurring.
Main Success Scenario:

1. Duplicate check is opened.
2. If no leads exist to check for duplicate data, create a lead.
3. Select which types of fields you would like to check for duplicate data.
4. Leads will allow you to specify percentage of "fuzzy" data (incorrect data) allowed to match with records.
5. Add a new "Duplicate Check Job" through the "DC Check" tab and run.
6. Select which records you would like to merge and check the box next to each merging record.
7. Confirm the selection



TO-BE PROCESS FLOWS

Note: Business processes that will not change are not included in the following process-flow descriptions and diagrams. Refer to "current state analysis" for these processes.

To-be process flow diagrams can be found in appendix 4.

MEMBER MANAGEMENT

The way in which the Coalition will manage their member organizations will remain largely unchanged, with the exception of Chatter. After registering a member in SalesForce, there will be additional activities associated with adding that new member into a "Members" Chatter group, and assigning them further to subgroups. Assignment into subgroups will largely be based on offline and email interactions with appropriate Coalition staff members (e.g. the System's Coordinator) as to which subgroups to place new member organizations so as to facilitate future collaboration and convenient knowledge sharing.

DONOR MANAGEMENT

The coalition will be able to manage and track their donors in a much more efficient way. With the Salesforce update and proper integration with Click & Pledge donor data and tracking will be automated. This reduces the amount of time that is spent on eliminating redundant data from their system. If there is a need to validate that the donor information is accurate Salesforce also offers a way to cleanse the data. They will also be able to contact donors individually or on a broad scale to notify them on how their contribution to them have helped in their cause.

EVENT MANAGEMENT

The coalition will also be able to manage events more efficiently, although much of the functionality will remain the same. Utilizing Click & Pledge Event Management will allow the coalition to create events, manage registration, receive payments, and pull reports for the events in one place. All of this event management will be fully integrated with SalesForce.

DATA MAINTENANCE

Keeping consistent and clean data helps users trust the data when reports are created. Bad data is always a threat to any system, and therefore, a process is needed to keep this data clean. For example, merging duplicate records, contacts or companies. We have included a use case for merging duplicate data in the appendix.

DATA BACKUP

Data backup is crucial to make sure data is not lost. For example, when expanding, if it is discovered that the current production version of salesforce is using corrupt data, having a backup would help save time and money in correcting these mistakes. We have included a use case for conducting data back-ups in the appendix.

SANDBOXING

Sandboxes are isolated copies of your production version of salesforce. Since the Coalition currently lacks formalized testing procedures, we briefly outline Sandboxing and provide documentation on its use for testing new applications, conducting backups, and training. With the new version of SalesForce, the Coalition will have access to two types of sandboxes: the "Developer" and the "Developer Pro". The main difference between these two is that the "Developer Pro" sandbox allows for greater file and data storage during Sandboxing. We have included a use case for sandboxing in the appendix.

ALTERNATIVES

CRM / Requirement	SalesForce	MicroSoft Dynamics	Salsa
Designed for use by nonprofits	Salesforce for Nonprofits is specially designed for non-profits organizations. It has the ability to connect an entire nonprofit - including partners $36-72 dependent on version	Microsoft Dynamics CRM Online has non-profit pricing. Good for small and mid-size businesses Nonprofit pricing available $9.99 per user per month estimate	Salsa is a technology company that provides powerful fundraising, advocacy, and marketing engagement software to nonprofit organizations all over the world. $214/month + $0.01 per supporter
Ability to communicate	Cultivates donor relationships by breaking down silos and offering a	Multi-channel campaigns for personalized customer journeys. Drag and drop	Salsa merged with DonorPro, forming one powerful constituent

CRM / Requirement	SalesForce	MicroSoft Dynamics	Salsa
with donors and external partners	360 view of every interaction with a funder or volunteer.	communications across email, digital, social, SMS, and traditional.	engagement and management platform. Now nonprofit software customers can communicate and manage relationships with their constituents.
Can scale in size to meet needs for the next five years	The Nonprofit Starter Pack sits on top of Enterprise Edition, and is an application developed by Salesforce.org and its robust nonprofit community that pre-configures Salesforce out-of-the-box to help nonprofits manage their unique business processes.	Robust security features that can handle larger amounts of sensitive data. It has built in safeguards across devices and apps, onsite or in the cloud. Simple and reliable backup and disaster recovery with Azure.	Yes the system is scalable for growing organizations Allows for cloud storage
Able to integrate with other information systems in use	Install or quickly spin up mobile and social apps to manage programs and services.	Integrated with social media (Facebook, Twitter, etc). Integrates with excel and other microsoft software.	Tools to sync with salesforce and other applications
Provides ability to customize reports for very specific needs of different groups throughout the enterprise	Reinvented analytics for social impact with Salesforce Wave Analytics. Dynamically drill into data to identify opportunities and make better decisions. Wave Analytics is a cloud-based platform.	Integration with excel for looking at data. Other good reporting tools available.	There are options to create custom reports. Standard reports as well as aggregate reports. Use a report builder that is easy to use with a lot of instructions.
Can track the entire lifecycle of a customer's	Break down the silos and empower your entire nonprofit to make a case	Offers a familiar and connected solution for small or midsized business	Donor development (aka moves management) in Salsa CRM allows you to

CRM / Requirement	SalesForce	MicroSoft Dynamics	Salsa
relationship with the enterprise	for giving with a complete picture of your donors, volunteers, members and other constituents in one place.	to access and analyze customer and industry data, and deliver personalized engagement through each phase of the customer relationship.	identify contacts toward specific major or planned giving goals while tracking their progress with customizable workflows.
Widely available on all types of platforms, from client to cloud	Offered on the cloud	Offered on the cloud and mobile. Will not run on Mac or Linux. Must use internet explorer.	Cloud functionality and available on all platforms.
Can be customized by in-house developers or can be used by consultants	Salesforce's AppExchange more than 1,700 partner apps, 1.7 million customer installs and a dedicated Nonprofit AppExchange.	Customization available.	Meant to be used as is, additional tools available for download.
Wide user base, lots of information available for technical support	Online tools and training, best practice coaching, 24/7 support, technical help for app development, and Administration Services to extend your team's capacity, Success Plans.	Comprehensive technical support for each of its CRM services. Has help, documentation, and elearning for end users and admins. Has technical and developer help. User forums available, and can get customer support.	All data is integrated and free phone support is available. There is also a live chatting feature on their website. Has a userbase that spans multiple topics.
Intuitive user experience for all levels of user expertise	Easy to setup and customize, no software download.	Many of its features are drag and drop.	Allows for drag-and-drop form building, and custom list segmentation.

RECOMMENDATIONS

Our client, CEGV, has primarily decided to continue to use SalesForce. For the identified problems, we provide solutions based on the capabilities of SalesForce. In the table below, we compare several comparable customer relationship management solutions to SalesForce, Microsoft Dynamics and Salsa. Both of these are CRM software that provide functionality specifically for nonprofits. However, we endorse SalesForce as a scalable solution for the coalition.

FUTURE STATE RISK ASSESSMENT

SECURITY

- SalesForce: This system involves cleansing data in order to implement the new system. This could cause a data security risk.
- Chatter: Creating a chatter group could also cause a security risk depending on the privacy settings of the chatter group. For example, for unlisted groups, if third-party applications that are integrated with SalesForce are used with Chatter, unlisted group information could be made available to users who do not have access. However, for these unlisted group members, SalesForce objects and data are inaccessible.

IMPLEMENTATION AND MAINTENANCE

- Click & Pledge: Some people at the Coalition use Form Desk instead of Click & Pledge. There may be individuals opposed to learning a new system which will cause implementation issues.
- SalesForce: Maintaining the implemented system may become an issue for the Coalition due to limited resources within the Coalition to support SalesForce users, and will mean problems long term.
- Vertical Response will need to be decommissioned, which may cause significant resistance due to its deep integration in current CEGV processes.
- Mass emailing could prove difficult to implement due to its rigidity and difficulty in customization (i.e. knowledge of HTML and CSS would be required for personalization).

TRAINING

- SalesForce: Implementing the new system will require users to familiarize themselves with the new system and learn the new functionalities of the system. This will increase time spent implementing the system, and the risk that some people will not learn to use the system entirely.

FINANCIAL

- In training and implementation, employees are spending time learning the new system, and spending less time on their usual work, which will cause an financial risk for the Coalition. Furthermore, there is a very limited budget, and implementing the system using 501 Commons will cause a financial risk.
- Chatter: If the Coalition surpasses 5,000 Chatter Free users, it will need to pay for additional Chatter Free account licenses in order to continue expanding.
- Vertical Response: Decommission will cause sunk costs from unused email credits.

IMPLEMENTATION AND MAINTENANCE CONSIDERATIONS

DATA MIGRATION

Since data migration is outside the scope of this project, information specifically related to installation will be kept at a high level and will be further expanded by 501 commons. The basic process of data migration would include data cleansing, use of “Importing Template” and the “Importer Tool”, as well as other SalesForce Data Tools for Nonprofits. One consideration would be the field designations: Contacts would be donors, volunteers, etc; Accounts would be households, organizations, or companies; and opportunities would be donations, memberships, and grants.

TRAINING/SUPPORT

With consideration to budget and time constraints of the Coalition the primary mode for user support and training will be through online e-learning resources provided by SalesForce, help and other documentation, and the discussion forums to crowdsource solutions (i.e. the “Power of Us Hub”). SalesForce has a robust set of training and support features that come with the Enterprise edition, and due to the readily available a to this information on the Help tab, these resources will not be explained in detail in this tutorial, but instead included in references under "Support" for our client to explore. With the Nonprofit Starter Pack, a key method of support for the primary SalesForce users at the coalition would be the "Power of Us Hub", since it offers real-time support for user questions. With resident Click & Pledge, QuickBooks, and other product experts who regularly browse these Chatter feeds, questions about system functionality can be directed to the appropriate sources through either the "@" or "#" symbols for specific groups and topics. Certifications are also a possibility if the budget for the proposed system update allows for this significant investment (~$2000/course).

SUMMARY AND CONCLUSION FOR FUTURE STATE

In conclusion, we have provided several recommendations for how the Coalition can modify their current business processes to take full advantage and adapt to the future system in the Nonprofit Starter Pack. This is not an exhaustive list of how to fully utilize SalesForce and associated applications, but does address specific client concerns and takes advantage of opportunities to increase member and board involvement through Chatter, volunteer management, generate effective reports, conduct QuickBooks donor accounting with greater ease, and more. We also incorporate considerations pertaining to Implementation and Maintenance that provide foundations and resources for testing, data maintenance, data backups, and merging duplicate records. Beyond these recommendations, we hope that further exploration of SalesForce functionality can be conducted with current and future Coalition staff members, and further expansion of the Coalition can be achieved.

APPENDIX 1 – AS IS PROCESS FLOW DIAGRAM

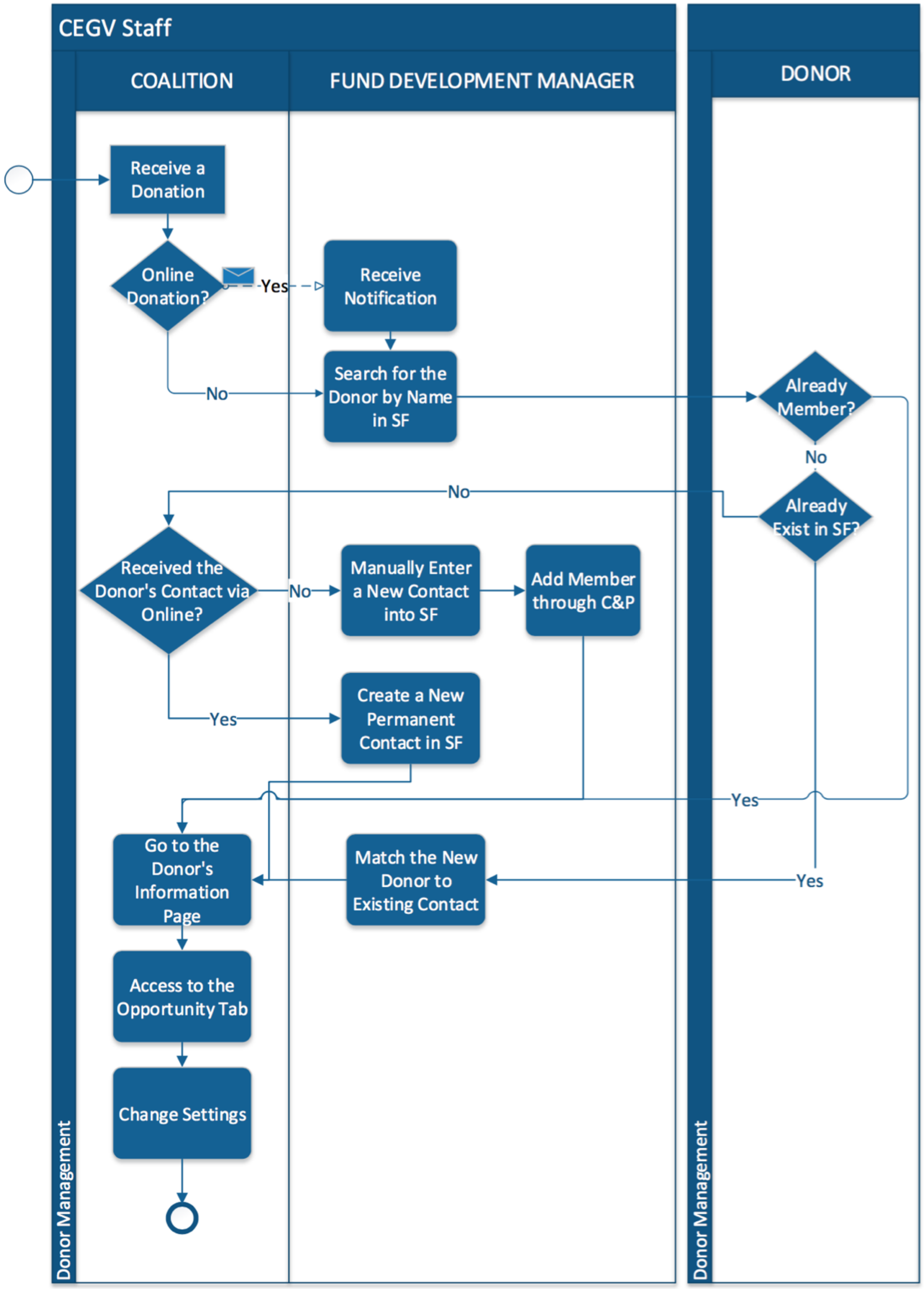


Figure 1.1 Donor Management

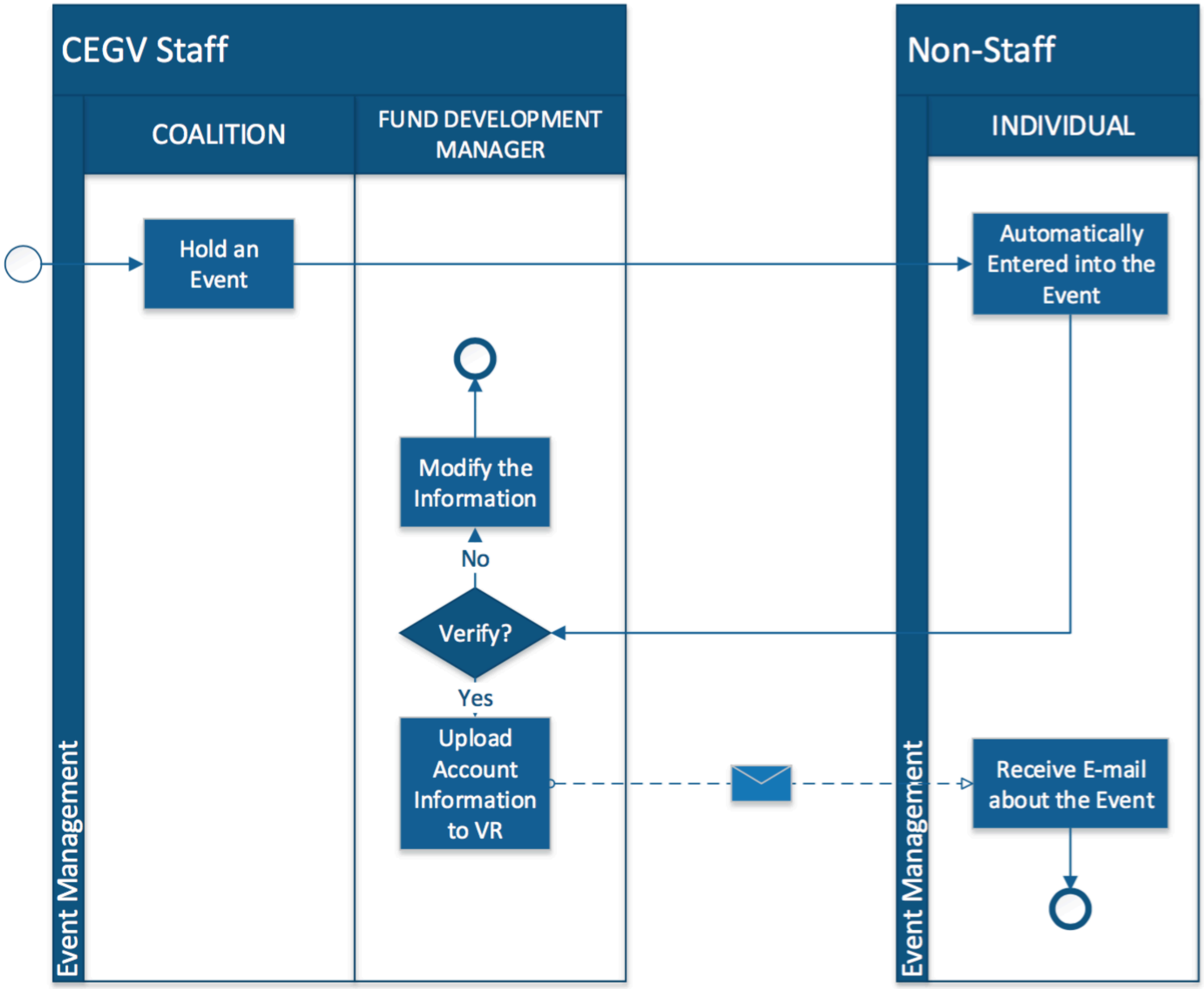


Figure 1.2 Event Management

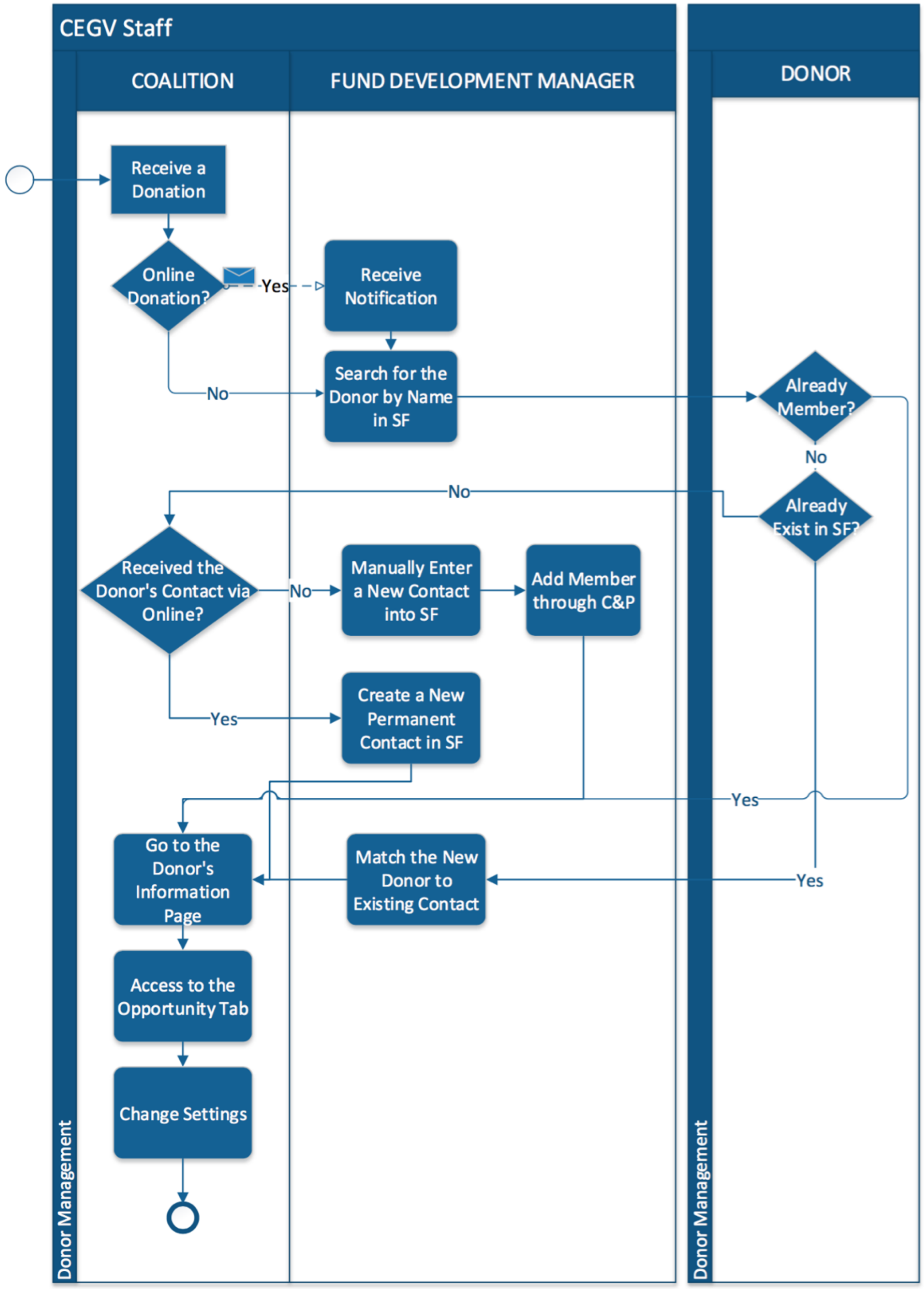


Figure 1.3 Member Management

APPENDIX 2 - AS IS USE CASE DIAGRAM

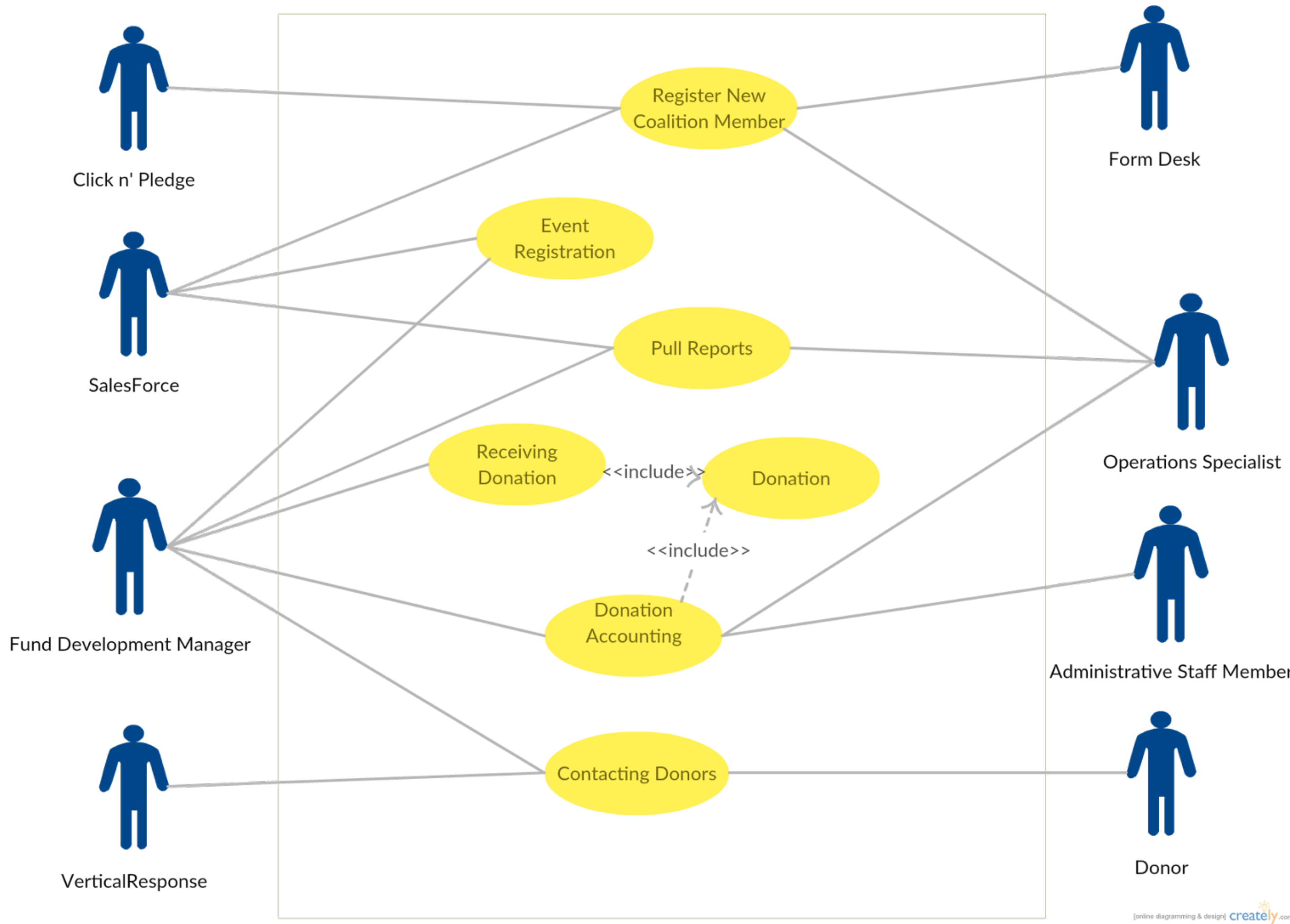


Figure 2.1 As Is Use Case Diagram

APPENDIX 3 - TO BE USE CASE DIAGRAM

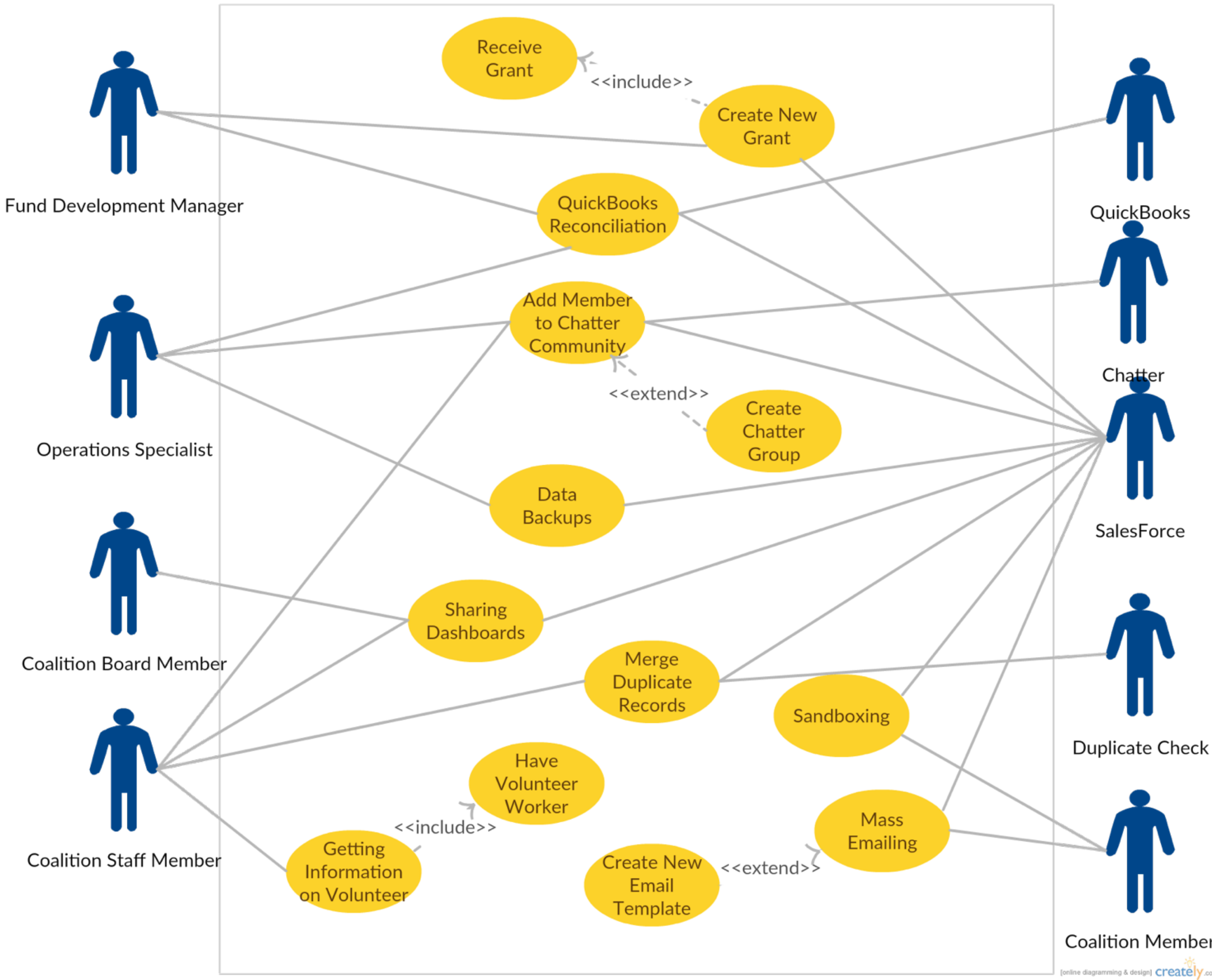


Figure 3.1 To Be Use Case Diagram

APPENDIX 4 - TO BE PROCESS FLOW CHARTS

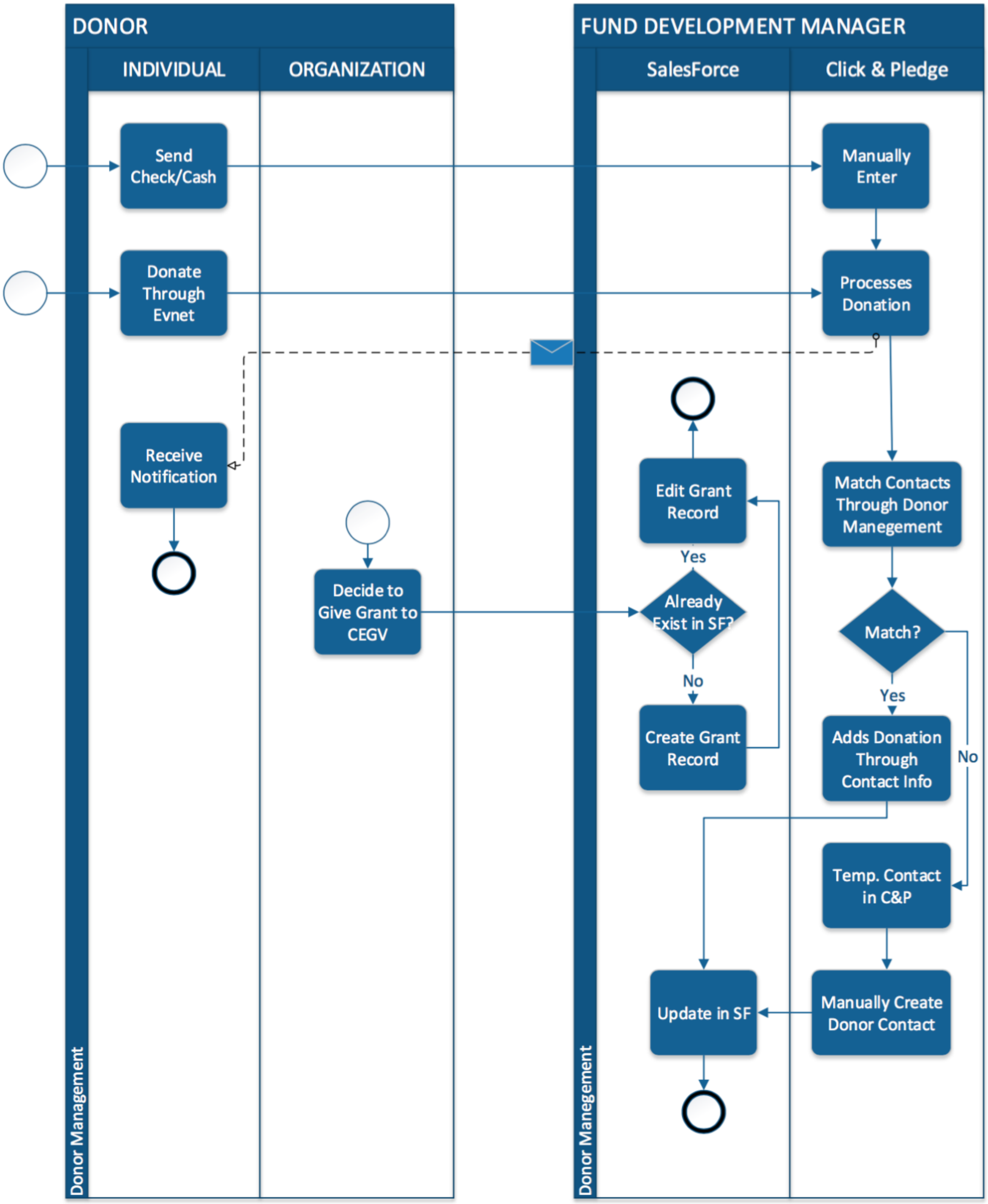


Figure 4.1 Donor Management

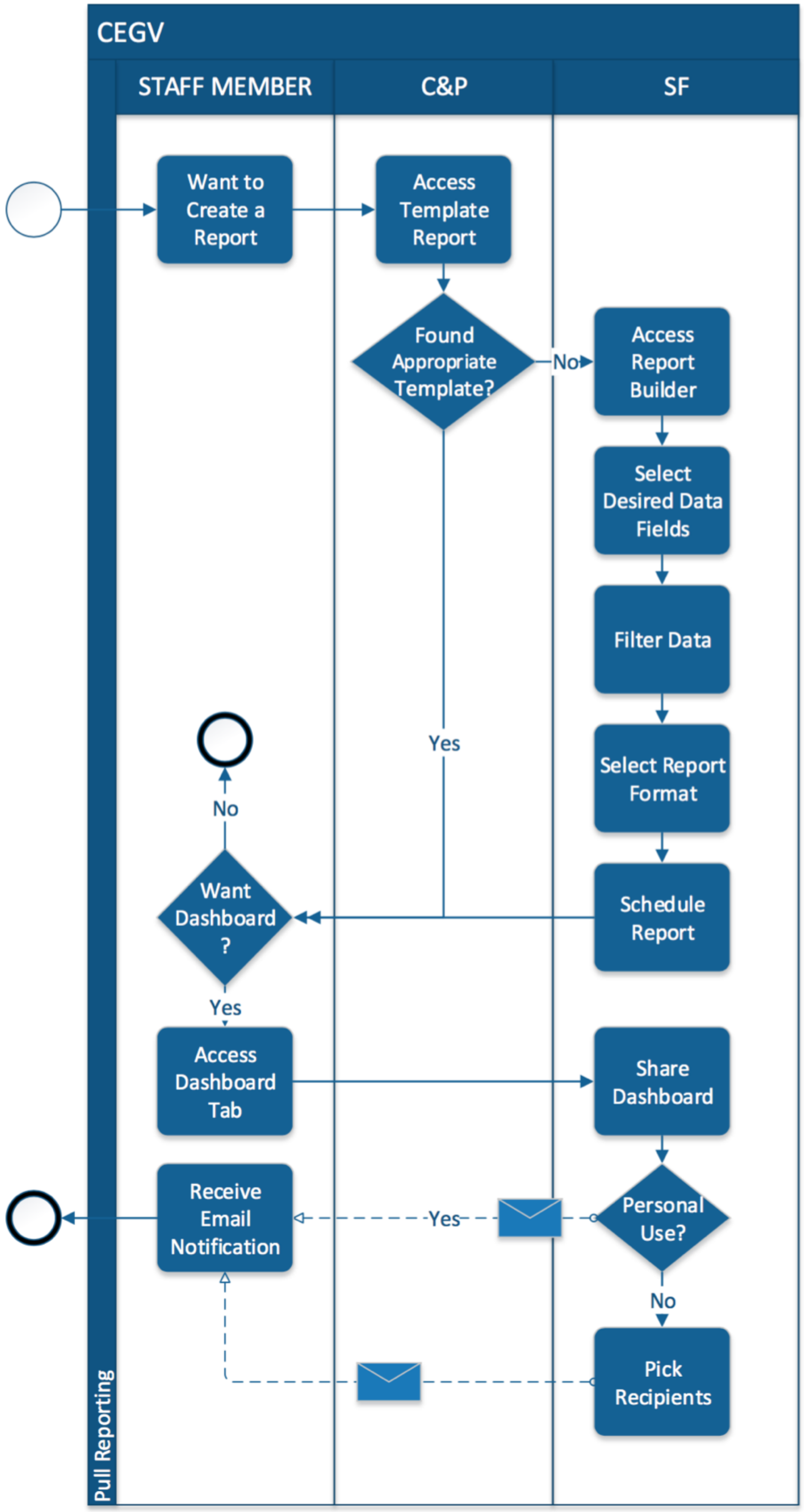


Figure 4.2 Pull Reporting

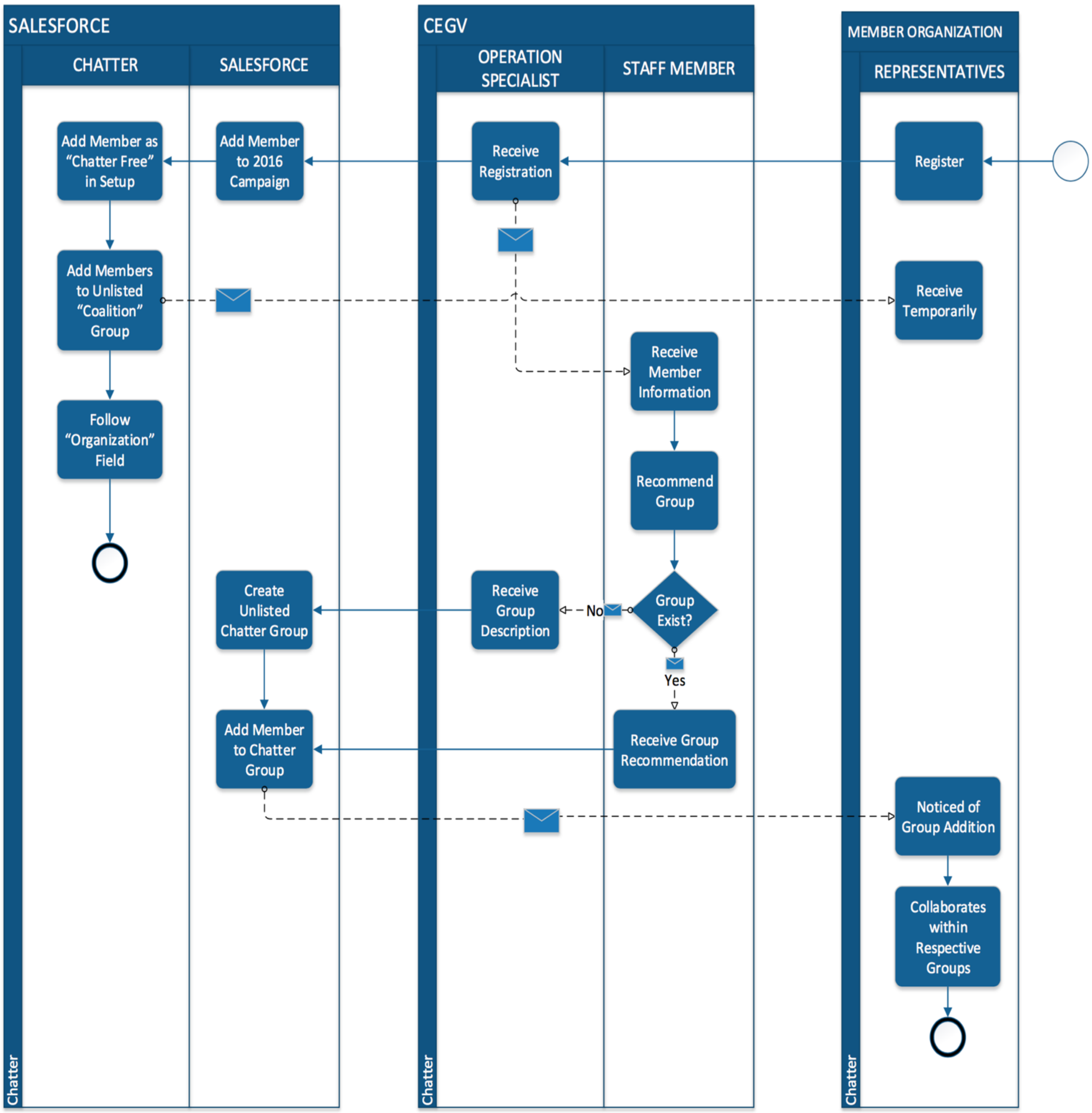


Figure 4.3 Chatter

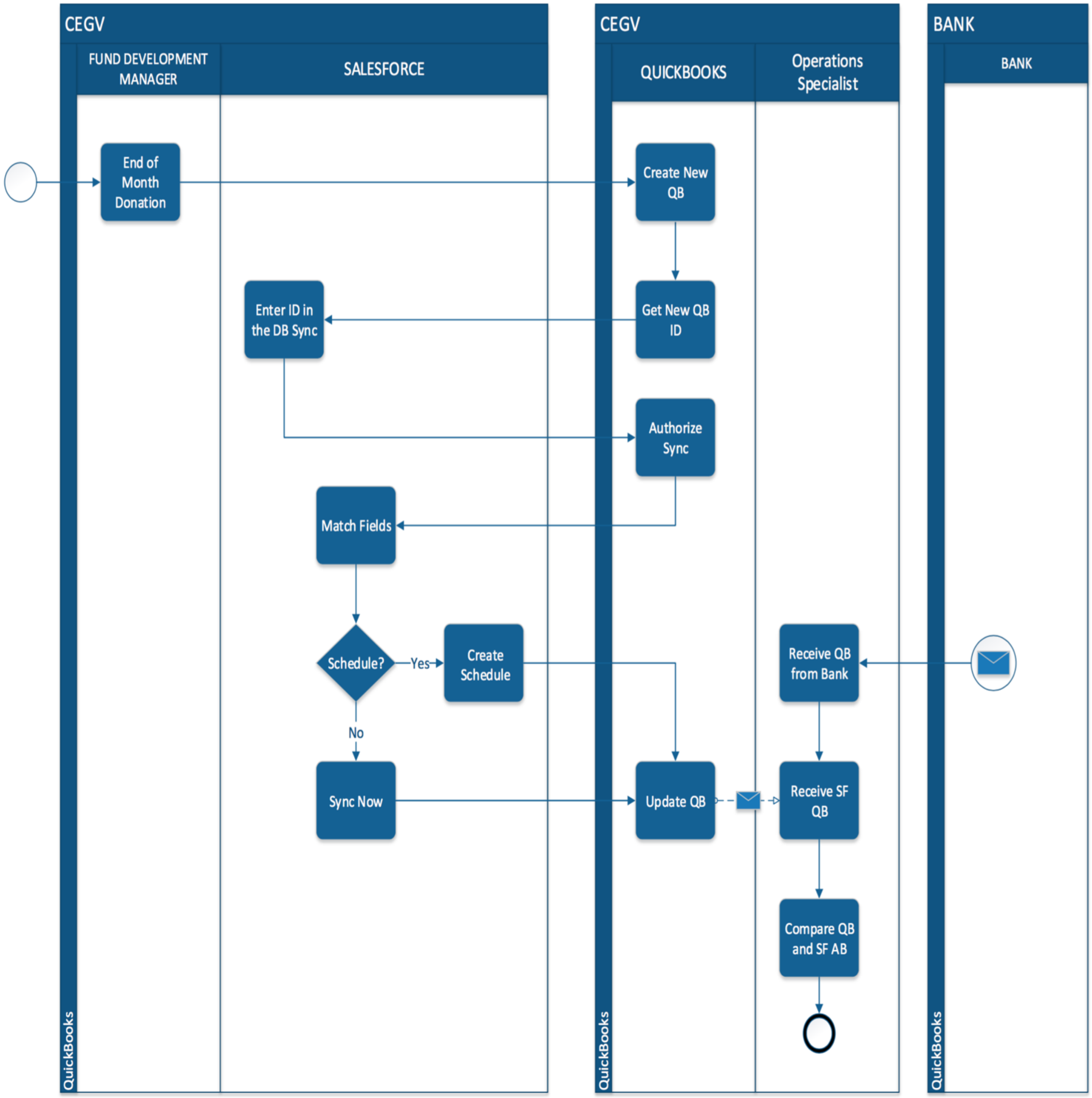


Figure 4.4 QuickBooks

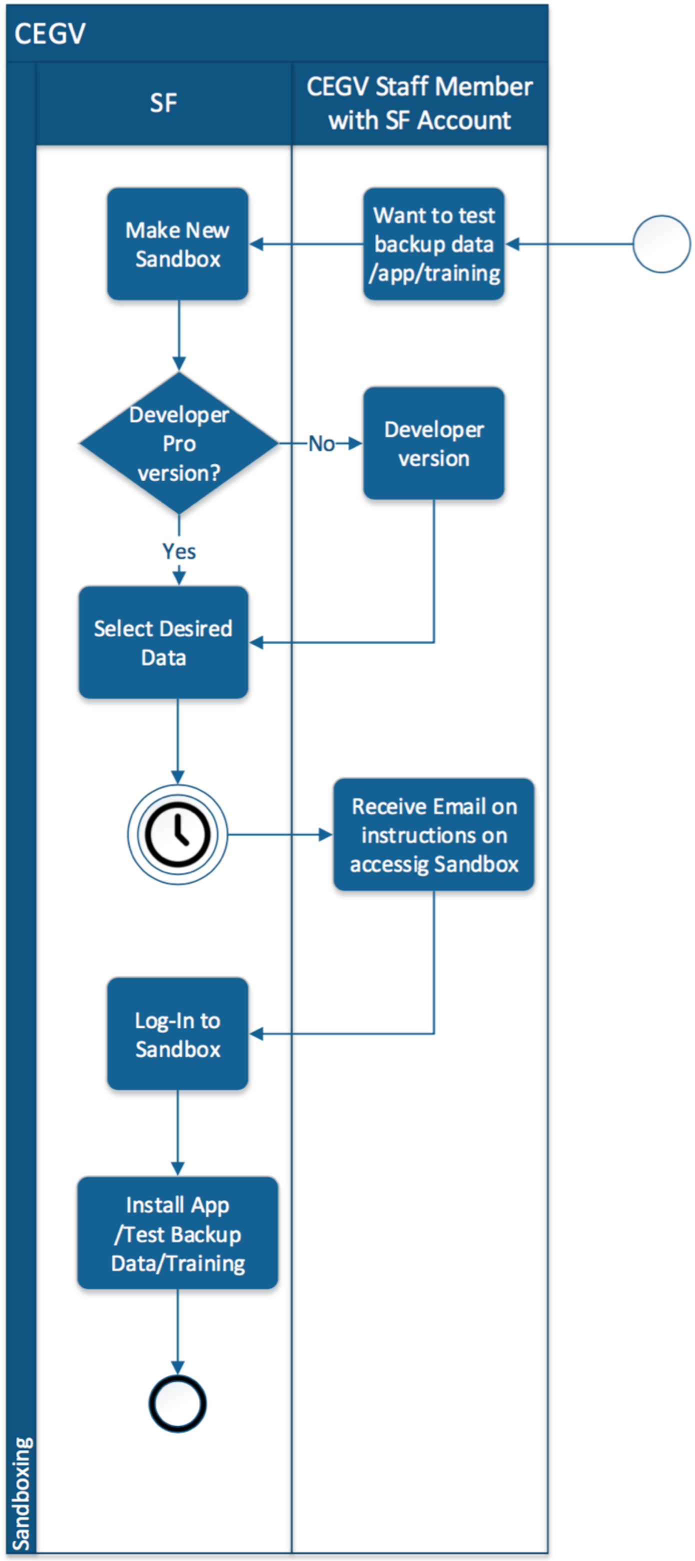


Figure 4.5 Sandboxing

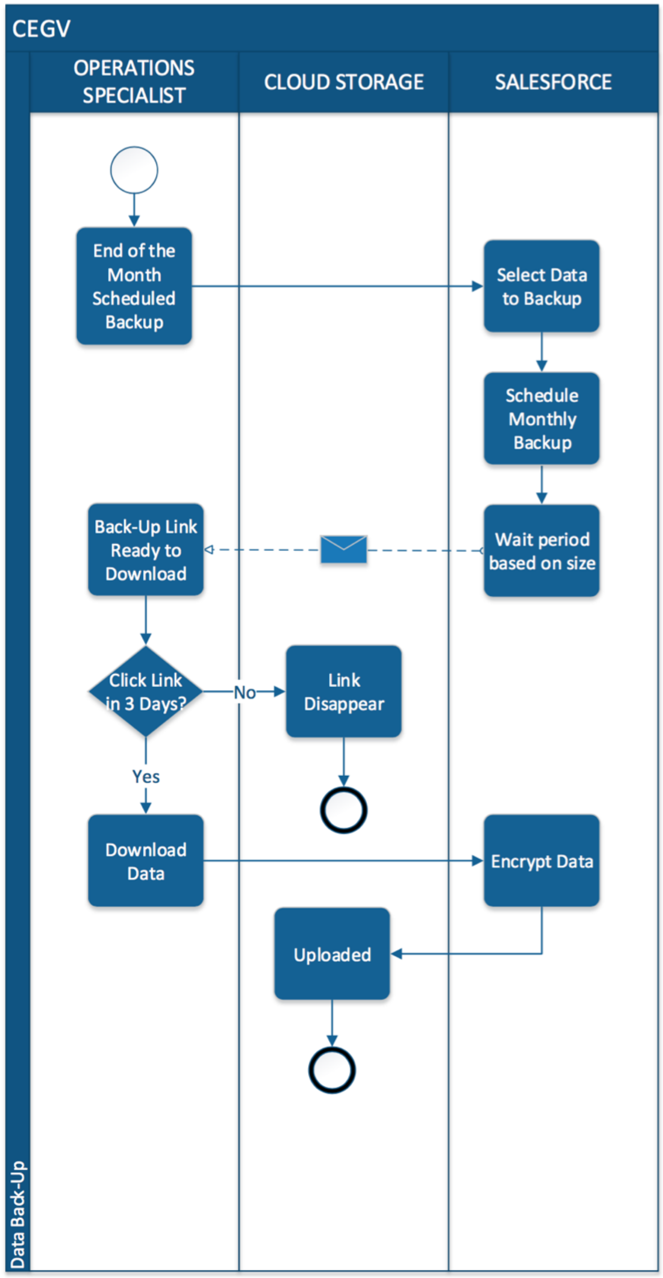


Figure 4.6 Data Back-Up

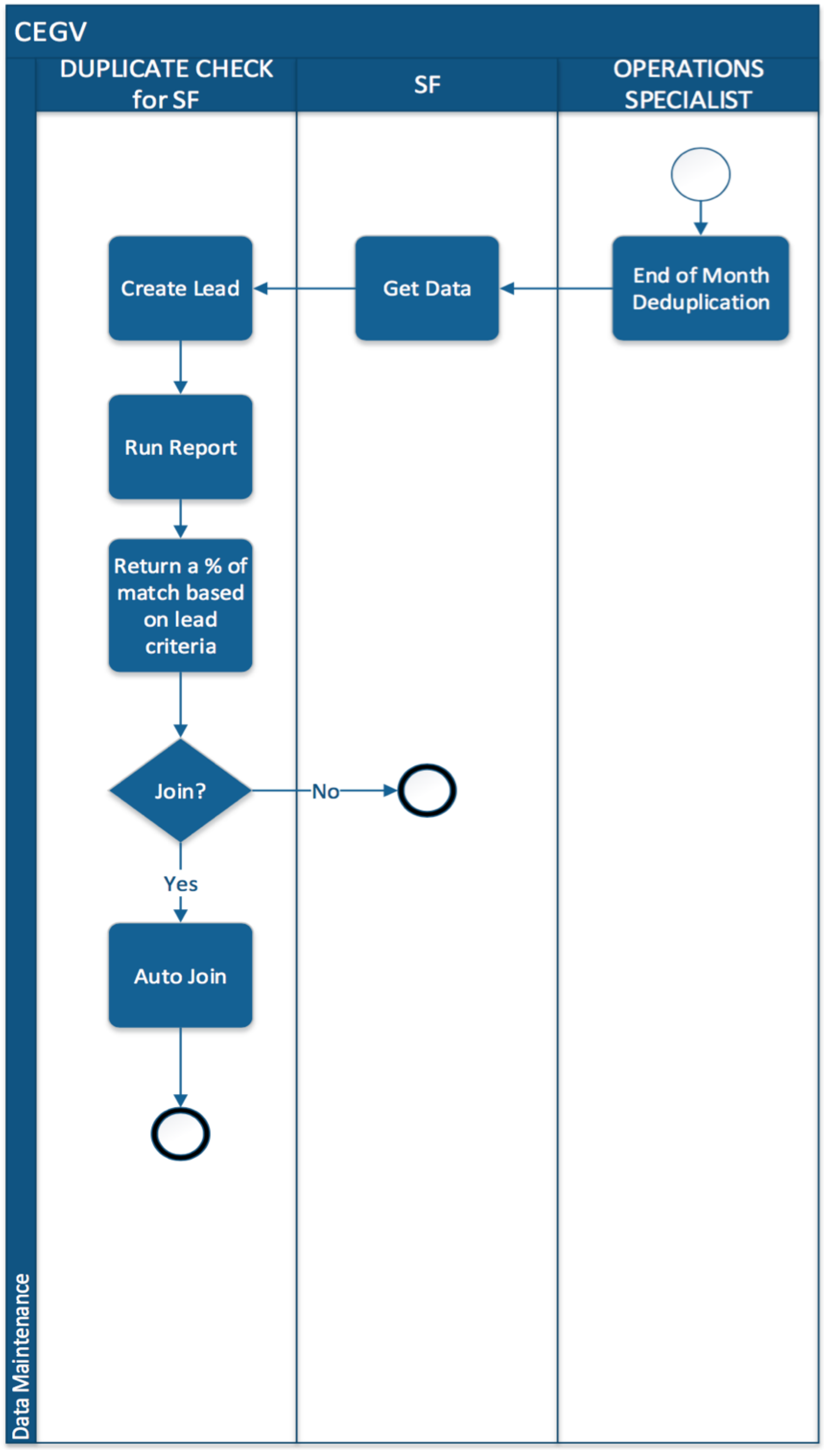


Figure 4.7 Data Maintenance

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https://help.salesforce.com/HTViewHelpDoc?id=email_mass.htm

https://help.salesforce.com/apex/HTViewHelpDoc?id=email_integrated_email.htm&language=en_US

SHARING DASHBOARDS

https://resources.docs.salesforce.com/202/latest/en-us/sfdc/pdf/salesforce_analytics_folder_sharing_cheatsheet.pdf

https://help.salesforce.com/apex/HTViewHelpDoc?id=rd_dashboards_share.htm

ADD MEMBER TO CHATTER COMMUNITY

https://resources.docs.salesforce.com/sfdc/pdf/chatter.pdf

https://help.salesforce.com/apex/HTViewHelpDoc?id=users_license_types_chatter.htm

https://powerofus.force.com/apex/nugget?id=a4R80000000CqoVEAS

https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_stop_following.htm&language=en_US

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https://help.salesforce.com/apex/HTViewHelpDoc?id=collab_unlisted_groups_overview.htm&language=en_US

QUICKBOOKS

https://appexchange.salesforce.com/servlet/servlet.FileDownload?file=00P3000000P3di8EAB

https://dbsync01.appmashups.com/appmanager/library/SF2QBBi-directional.pdf

GET INFORMATION ON VOLUNTEER

http://www.salesforce.org/highered-4/volunteer-management/

CREATE NEW GRANT

https://powerofus.force.com/articles/Resource/NPSP-Create-and-Manage-Grants

RECOMMENDATIONS AND ALTERNATIVES

http://www.salesforce.org/nonprofit/

https://www.salsalabs.com/

IMPLEMENTATION

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MERGE DUPLICATE RECORDS

https://support.duplicatecheck.com/article/how-tos/how-to-find-and-merge-duplicate-records-in-your-salesforce-organization

https://appexchange.salesforce.com/listingDetail?listingId=a0N300000058vzKEAQ

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https://help.salesforce.com/apex/HTViewHelpDoc?id=data_sandbox_create.htm&language=en_US

OTHER

REPORTING

https://developer.salesforce.com/trailhead/reports_dashboards/reports_dashboards_getting_started

https://www.youtube.com/watch?v=7Yo6DwOCW4Y

https://developer.salesforce.com/trailhead/module/reports_dashboards

WEBINARS

https://www.clickandpledge.com/Webinar/

http://www.salesforce.org/past-webinars/?wpv_paged_preload_reach=1&wpv_view_count=15877-CPID15881&wpv_post_id=15881&wpv-industry-type=nonprofit

FURTHER EXPLORATION

SOCIAL MEDIA INTEGRATION:

http://salesforce.vidyard.com/watch/FZfHdKa6TuGog-JHzOlLDg
https://help.salesforce.com/apex/HTViewHelpDoc?id=social_networks_overview.htm

MARKETING CLOUD

http://www.salesforce.com/marketing-cloud/overview/