

Project Title: NGO Donor & Volunteer CRM

Phase: 1

Problem Statement:

NGOs face challenges in managing donors, tracking donations, and coordinating volunteers effectively. Manual processes such as spreadsheets or paper-based records cause delays, errors, and lack of transparency. This results in poor donor follow-up, inconsistent volunteer engagement, and limited insights for directors and managers.

The NGO Donor & Volunteer CRM aims to overcome these issues by providing a Salesforce-based application that:

- Centralizes donor, donation, volunteer, and event records.
 - Automates acknowledgments and high-value donation approvals.
 - Improves volunteer assignment and event coordination.
 - Offers dashboards and reports for real-time decision-making.
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Problem Understanding & Industry Analysis

This phase focuses on analyzing NGO operations, identifying stakeholder needs, and aligning the CRM solution with nonprofit practices. The key activities include:

1. Requirement Gathering

- Understand NGO needs: donor tracking, donation approvals, volunteer coordination, and event management.
- Key requirements include donation acknowledgment emails, duplicate prevention, volunteer scheduling, and performance reporting.

2. Stakeholder Analysis

- **Admin:** Configures and maintains the system.
- **Donor Manager:** Engages with donors and tracks contributions.
- **Volunteer Manager:** Allocates volunteers to events and monitors activities.
- **Director:** Approves large donations and reviews NGO-wide reports.

3. Business Process Mapping

- Example Flow: Donor makes contribution → Donor Manager records it → If donation exceeds a threshold, Director approves → Donor receives

acknowledgment → Reports updated → Volunteer Manager assigns volunteers to related events if required.

4. Industry-Specific Use Case Analysis

- NGOs depend on donations and volunteer efforts; mismanagement can harm reputation and funding.
- Donor engagement and transparency in donation usage are critical.
- Effective volunteer management improves event success and outreach.

5. AppExchange Exploration

- Existing “Nonprofit Success Pack (NPSP)” apps exist, but this project builds a simpler custom CRM to focus on core learning while addressing NGO needs.