

NGO Donor & volunteer CRM

Phase 10: Final Presentation & Demo Day

10.1 Pitch Presentation

Project Title: NGO Donor & Volunteer CRM

Problem Statement:

NGOs struggle with managing donors, tracking donations, and coordinating volunteers. Manual processes like spreadsheets lead to errors, delays, and lack of transparency. This results in poor donor follow-up and weak volunteer engagement.

Proposed Solution:

A Salesforce-based CRM that centralizes donor, donation, volunteer, and event management. The system automates thank-you acknowledgments, ensures approvals for high-value donations, and provides real-time dashboards for decision-making.

Key Features:

- **Centralized Records:** Donors, Donations, Volunteers, and Events in one platform.
- **Automation:** Thank-you emails, follow-up tasks, and approval workflows.
- **Volunteer Management:** Assign volunteers to events through a junction object.
- **Dashboards & Reports:** Monitor donation trends and volunteer participation.
- **Security:** Role hierarchy and profiles for Directors, Donor Managers, and Volunteer Managers.

Impact:

- Saves manual effort and reduces errors.
- Improves donor relationships through timely communication.
- Increases transparency in donation usage.
- Enhances volunteer coordination and event success.
- Provides NGO leaders with data-driven insights.

10.2 Demo Walkthrough

- Showed the custom Salesforce app (*NGO CRM*)
- Created sample donation and volunteer records
- Demonstrated automation: thank-you email + follow-up task
- Displayed dashboards for donations and volunteer activities

10.3 Highlights

- Centralized donor, volunteer, and event data
 - Automated workflows reduce manual work
 - Approval process ensures transparency
 - Dashboards give insights for NGO decision-making
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10.4 Project Repository & Demo Links

- **GitHub Documentation:** [NGO Donor & Volunteer CRM Repo](#)
- **Demo Video:** [Demo video](#)