



# NONPROFITS in the CLOUD

The passion to help others, give back and make an impact in your own community is prevalent and strong. For nonprofits, the opportunity and challenge is in harnessing this passion. Nonprofits need support and resources, and now more than ever, volunteers are showing up to help. More than 77 million people volunteered in 2018, according to AmeriCorps, an increase of almost 15 million from 2016. In all, almost one-third of all Americans gave their time to support nonprofits and causes in need across the country.

Salesforce.com has created tools and strategies for success that allow nonprofits to simplify, accelerate and transform their operations to create meaningful impact. Redpath Consulting Group has had the opportunity to bring these strategies to life and witness the transformation first hand.

These stories of success and transformation are outlined in this whitepaper.

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## **OPPORTUNITY 1:**

# **Optimizing Volunteer Management**

Volunteers are the lifeblood of many nonprofits. Enrolling them presents challenges for many organizations due to clunky or dated systems that make participation difficult. Tracking is rarely integrated with other aspects of the organization's programs or process like donations, events and grant-making.

Salesforce solves these challenges by allowing nonprofits to easily register volunteers and keep an accurate record of these vital team members for future communications. Through Salesforce, volunteers can be sent customized automated notifications and reminders upon signing up for or completing a shift. Nonprofit team members also have access to helpful reports and dashboards providing them with a comprehensive look at the work certain volunteers are doing and what areas may require extra support. Finally, volunteers can also be classified by specific skills, allowing the organization to match the perfect volunteer with the right job.

## **SUCCESS STORY:**

# **HOW THE MINNESOTA LITERARY COUNCIL SIMPLIFIED VOLUNTEER MANAGEMENT**

**MINNESOTA**  
**Literacy**  
**COUNCIL**

Minnesota Literacy Council (MLC) helps thousands of people each year develop language, math and career training skills, among others. With the sheer volume of adults and children in need, a team of volunteers is required to deliver the training and support the organization.

Redpath worked with MLC to integrate their website with Salesforce to display available volunteer opportunities and training courses for volunteers to certify them. The project also created a search function helping those seeking classes to easily find them. In addition, internal staff can now publish new training classes and volunteer opportunities immediately and hear from potential volunteers through a number of channels.

Additionally, MLC's project with Redpath also improved MLC's training program for volunteers. Within Salesforce, MLC can now track each volunteer and how they are progressing with their training.

## **SALESFORCE STARTING SOLUTIONS:**

### **Use Salesforce to:**

- Record volunteers
- Use that data to keep in touch

## OPPORTUNITY 2:

# Program Management

The complex engagements of nonprofits require effective project management, yet many nonprofits lack the comprehensive solution they need to maximize a project's potential and manage it all the way through at a high level.

Salesforce allows nonprofits to guide the entire story to completion by bringing integral players together — regardless of distance — and optimizing every facet of the project. Use Salesforce as a standalone project management solution or integrate existing project management systems for total visibility. The project management capabilities within the system can also be customized to match the needs of certain departments, allowing outreach to focus on volunteer and donor engagement programs with project teams using project management tools to monitor a task's required expenses and time.

## SUCCESS STORY:

### LITTLE FREE LIBRARY'S EMPOWERED MANAGEMENT OF ITS LIBRARIES AND COMMUNITIES



Dedicated to supporting the growth of reading through free book exchanges around the world, Little Free Library had yet to establish a data model that properly managed their libraries and contributions. The problem was dealing with Google Maps

— which had reached its data point limit — and a clunky interface that prevented users from filtering information, or easily searching for libraries.

To assist Little Free Library in their mission to build literacy-friendly neighborhoods, Redpath used Salesforce to create a data model with custom objects to track owners and locations of libraries and built a web page to display libraries and contact information integrated natively with Google Maps using real-time Salesforce data containing geocodes for each library.

## SALESFORCE STARTING SOLUTIONS:

### Use Salesforce to:

- Integrate with your current in-house system





## **OPPORTUNITY 3:**

### **Outcome Tracking**

The success of a nonprofit's previous initiative plays a vital role in the strategy designs for the next one. In too many cases, however, the outcome of a previous campaign is subject to question because of incomplete or incorrect data. Securing accurate data not only legitimizes the previous campaign, it allows teams to optimize their efforts for the plan ahead.

Wave Analytics helps nonprofits to improve their efficiencies with a robust platform that scales to meet organizational needs and record and access clear, accurate data. It is also designed for easy mobile access, and links to existing Sales Cloud and Service Cloud platforms.

### **SALESFORCE STARTING SOLUTIONS:**

#### **Use Salesforce to:**

- Apply Wave Analytics to track outcomes

## **SUCCESS STORY:**

### **HELPING BESTPREP CAPTURE ITS BEST OUTCOMES**



Redpath has been working with BestPrep for a number of

years with Salesforce to help manage their volunteers, student programs, event participants and donors. In this instance, BestPrep needed to capture updated data on their growing volunteer team.

To improve BestPrep's Salesforce processes, Redpath customized their Salesforce environment to better track volunteer interests and demographics to meet reporting requirements. The team also created a dynamic, pre-filled FormAssembly form so that volunteers could view and update their information within a present email.

Finally, as volunteers modified their information, the form automatically updated their volunteer Salesforce record. Under certain conditions, BestPrep was notified for manual verification, providing the nonprofit with clear, effective results. This gives BestPrep a 360-degree view of what their entire organization is doing.

## OPPORTUNITY 4:

# Grant Management

Nonprofits and foundations require visibility regarding grant due dates and application deadlines. These assets assist organizations in navigating the intricacies of grants, as they can look different on a case-by-case basis. However, many organizations lack access to this data entirely.

Salesforce allows these organizations to track each step of the process from inquiry all the way through to being awarded a grant. Salesforce can also help foundations by collecting applications and awarding grants. Then, the organization can monitor the progress with the grant so they can report on the impact.

## SUCCESS STORY:

### TRACKING GRANTS, GIFTS AND FUNDS FOR SOUTHWEST INITIATIVE FOUNDATION

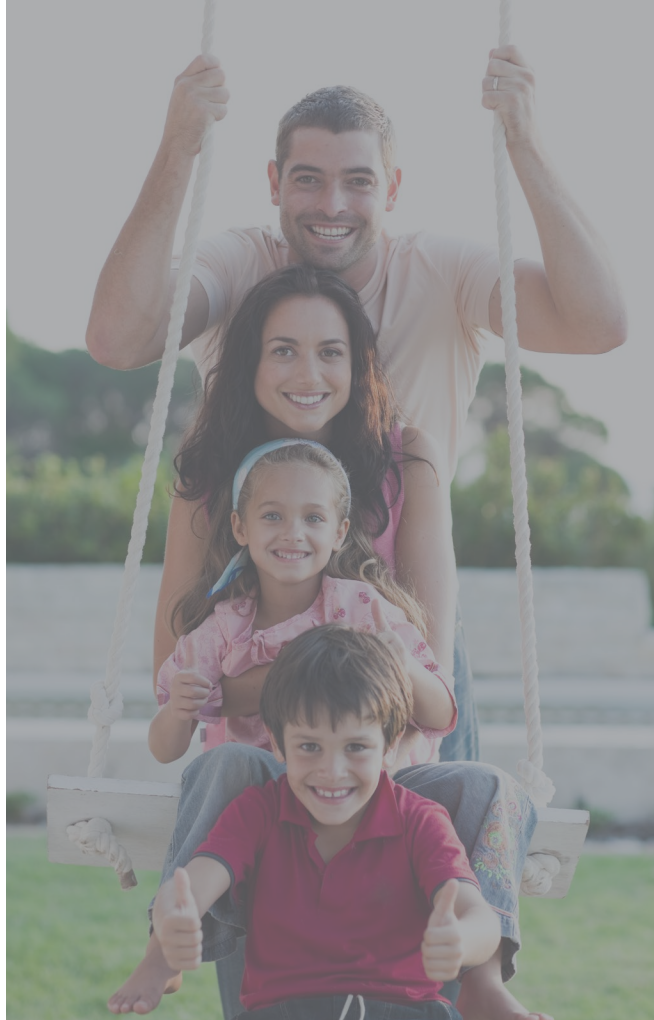


Southwest Initiative Foundation is a regional foundation that manages its own endowment as well as more than 25 community foundations and donor-advised

funds with \$55 million in assets. The foundation needed a better way to track the money it was managing, the disbursements against the funds, the money coming in through gifts, and to assess and manage a loan program to help economically grow the southwest region of Minnesota.

Redpath implemented Salesforce's Nonprofit Success Pack and created a loan conversion process for loan prospects, as well as a custom process for tracking time related to loan prospects and loan servicing. The solution also called for the implementation of Workato to integrate between Salesforce and Intacct to track transactions for gifts, loan disbursements and payments, invoice payments and transactions between funds.

The results of these and other Salesforce implementations by Redpath saw Southwest Initiative Foundation create a single source of truth that reduces time requirements across the organization and gave all members access to the data they needed to manage their grants appropriately.



## SALESFORCE STARTING SOLUTIONS:

### Use Salesforce to:

- Collect applications
- Track total grant process



## OPPORTUNITY 5:

### Donation Management

Nonprofits need the ability to easily and efficiently collect donations, as well as to quickly generate reports on donations to track progress on their quarterly and yearly goals. Absence of this process and information can leave nonprofits feeling adrift.

Salesforce solutions allow nonprofits to track donation history and associate each gift with a contact within a specified household or company. In addition, nonprofits can easily report on pledged gifts vs. received gifts, and track interactions with prospective donors.

### SALESFORCE STARTING SOLUTIONS:

#### Use Salesforce to:

- Track donation history
- Report on gifts pledged

## SUCCESS STORY:

### AMERICAN CRAFT COUNCIL MIGRATES TO A SINGLE SOURCE OF TRUTH



American Craft Council (ACC) was motivated to move to Salesforce for several reasons. First they

wanted to migrate all of their data to a cloud-based solution that provided them a 360-degree view of their constituents. They were also seeking to create a single source of truth. In their current system different departments were unable to see current donors, limiting the organization's opportunities to fundraise.

Redpath partnered with ACC and over the course of three months helped ACC to convert, clean, stage and migrate all of their data to Salesforce, providing that single source of truth. Redpath also helped ACC use Salesforce to add governance to their data and processes, making it easier for new users and leadership to utilize the system without advanced technical skills.

As a result of these implementations, ACC today has a 360-degree view of their entire organization, coupled with a better user experience and easier data management. This allows the organization to save time and money while focusing on moving forward with its cause.



## OPPORTUNITY 6:

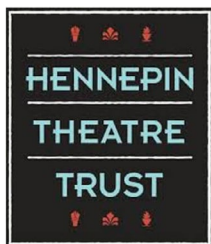
# Event Management

Successful events are the lifeblood of many nonprofits, but event organizers often feel they are flying blind with insufficient knowledge of attendee lists and records as well as unnecessary difficulties sharing event information.

Salesforce makes it easy to manage RSVPs and attendee records, linking event information to the record of the individuals that attend.

### SUCCESS STORY:

## CREATING A SEAMLESS CONNECTION FOR HENNEPIN THEATRE TRUST'S INTERFACE, PAYMENTS AND RECORDS



When Redpath delved into Hennepin Theatre Trust's (HTT) system it became clear that Salesforce, along with integrated applications from the App Exchange, could accomplish everything HTT wanted — and more.

To start, Redpath introduced Salesforce Foundation's donor tracking. A third-party donation processing app, Soapbox Engage, was added to seamlessly connect the user interface with payments and records management, giving HTT confidence that their data is accurate. Redpath also implemented solutions to support HTT's goals of supporting volunteer management, event registration and surveys.

Besides the tracking and processing tools, HTT now has access to dashboards, lists and reports that didn't exist in the old system. Employees can get a custom report or a quick view of recent transactions, donor history and more, so no one ever feels as though they are flying blind.

### SALESFORCE STARTING SOLUTIONS:

#### Use Salesforce to:

- Manage RSVPs



## **SUCCESS STORY:** **SCALING RESULTS AND EFFICIENCIES FOR THE BUSH FOUNDATION**



The challenge for the Bush Foundation was to manage and provide grants to organizations and individuals in a scalable and efficient way. The system they were using wasn't user friendly and required a lot of technical expertise. For users, it was a puzzle to understand organization affiliations.

Redpath worked with the Bush Foundation to implement Salesforce's foundationConnect to manage internal processes and the external client-facing application process. Redpath also created a custom user experience for internal and external users and a unique security model to control access to data and reports, ensuring everyone had access to the information they specifically needed.

## **OPPORTUNITY 7:** **Community Support**

Despite many stakeholders in nonprofit activities (donors, volunteers, partner organizations, etc.), there is rarely a platform that allows productive collaboration between the stakeholders and the community as a whole, and failure to use the organization's data to support this cause can lead the community to disappear.

Communication is critical to running a nonprofit well, whether working directly with volunteers or collaborating with a partner organization. Salesforce Community tools allow nonprofits to collaborate with supporters through shared access to relevant organizational information, keeping everyone on the same page and moving forward.

### **SALESFORCE STARTING SOLUTIONS:**

#### **Use Salesforce to:**

- Collaborate with supporters



## OPPORTUNITY 8:

# Being Mindful of Marketing

Nonprofits must maximize limited resources. This includes justifying their marketing spend, as every dollar spent away from the cause is closely scrutinized.

Fortunately, using marketing automation and other solutions from Salesforce to create segmented mailing lists allows nonprofits to save time and resources without losing that personal touch. The result is a cost-effective solution that maximizes the organization's outreach to donors, volunteers and other constituents while minimizing the financial impact.

## SUCCESS STORY:

### DELIVERING RESULTS AND GROWTH FOR INTELLECTUAL TAKEOUT



**Intellectual  
TAKEOUT**  
*A refuge for rational discourse*

Intellectual Takeout publishes articles on their website and

uses email to send subscribers a daily digest. ITO was managing two different email platforms, neither of which was robust enough to manage ITO's newsletter growth. Their old system was not flexible for their growth and they needed a new system for managing their subscribers and expanding their email marketing. They needed a system that automated their daily subscriber emails and connected with Salesforce.

Redpath implemented Pardot with FeedOtter. Pardot enabled the team to create easy-to-build email templates that, combined with FeedOtter, could automate daily subscriber emails that pulled stories from their website. With Pardot, Intellectual Takeout now has the capability to email constituents for other purposes, including fundraising, all while driving consistent branding through emails that share the same template design.

## SALESFORCE STARTING SOLUTIONS:

### Use Salesforce to:

- Create segmented mailing lists



## HOW REDPATH CAN HELP

Redpath is the largest Salesforce partner that specializes in nonprofits and foundations. Through our work, we collaborate closely with our customers to build a partnership based on trust and transparency.

Established in 2008 and based in Minneapolis, Redpath serves a variety of clients including Fortune 500 companies, nonprofits, and mid-market organizations. We have completed over 650 successful Salesforce implementations since 2008.

## THE RIGHT EXPERTISE

Our certified consultants have deep knowledge of implementing and building on the Salesforce platform. Collectively, we have 100 years of experience with:

- Custom Development/Integration
- Sales Cloud
- Service Cloud
- Marketing Automation
- Strategic Road Mapping

## THE RIGHT APPROACH

Redpath doesn't stop at learning your organization, watching for pitfalls or navigating available options. We find the most success by challenging the status quo and utilizing insights to simplify your current practices. Just as we've become a trusted partner with over 330 other organizations building on Salesforce, we can become yours as well.



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