RILWP SALESFORCE USERS SUMMARY
JANUARY 2010
ACORN NONPROFIT SOLUTIONS

EXECUTIVE SUMMARY

The Rhode Island Land and Water (RILWP) project to implement a software solution for donors, members and volunteers has been a net success for its participating partners, building their capacity, even though substantial grant funding, partner time and manpower has been dedicated to this effort. The benefits of this effort continue to compound for the participating RILWP partners. Salesforce has been an excellent software choice thanks to its great flexibility, low cost structure, security, and evolving technical capabilities, for meeting the needs of RILWP's diverse constituency of small land and water nonprofit organizations.

INTRODUCTION

The Rhode Island Land and Water Partnership has worked to offer a donor, member, and volunteer Customer Relations Management (CRM) software solution to build the capacity of our local small land and water organizations to carry out their environmental work. From the very beginning, the focus has been to learn together and share our acquired knowledge with the realization that our small nonprofits would likely not succeed in this effort without mutual cooperation.

At present, six partners are actively using Salesforce: two watershed groups, three land trusts, and one association. One partner, an association, has determined they will not be able to make the transition to Salesforce. One potential partner is still in the decision-making phase. Our partners have also influenced the choice of Salesforce for several other organizations: an out-of-state land trust, and an environmental school and an environmental association each based in Rhode Island. Workshops on Salesforce sponsored by RILWP and related materials provided on the RILWP website have also been accessed by organizations both in and beyond our state investigating our use of Salesforce. Rupert Friday participated in a panel at the national Land Trust Alliance rally last year.

Two partners, one land trust and one watershed organization are successfully using other software: one is using DonorPerfect Online, and another is using Access. It is worth noting that these two partners were the only two who successfully used the initial software solution chosen by the RILWP, Imis. Each group transitioned quickly onto their current software. ETapestry is another similar software that has been considered, but not selected by any of our partners.

In early 2009, RILWP had Idealist Consulting assist three partners already using Salesforce to move smoothly onto the new non-profit template offered by the Salesforce Foundation. This was a unique, one-time transition. Up to this point, non-profits were frozen in time with the version of the nonprofit platform in use at the time they received their donated software. Now as improvements are made to the platform, all nonprofits will be able to benefit from updates that will automatically flow through to their organization's database. As anticipated with the selection of Salesforce, software improvements developed to meet the demands of for-profit clients will now continue to benefit our non-profit partners with the latest features. The reorganization of the contact and account relationships with rollup fields for last donation, cumulative donations and more, and the new, easy-to-use page layout editor are just some of the significant changes in 2009.

For the survey summary below, Helen Tjader of Acorn Nonprofit Solutions, interviewed representatives of each RILWP partner either in person or by phone. Separate summaries have been prepared and proofed by each partner. While these are appropriate for sharing within our learning group, it was felt that the summary below which does not link comments to a specific partner, with the exception of the only user of DonorPerfect. Blue font highlights partner comments throughout the survey summary.

SURVEY SUMMARY

TRANSITION

- ✓ All but two of the organizations have completed their transition to Salesforce. However, even organizations that have been using Salesforce are still adding or considering inclusion of information and contacts beyond the initial scope of their use of Salesforce. Examples include: volunteers and skills, non-fundraising events and attendees, and property related information and contacts.
- ✓ RILWP partners were equally divided between importing initial data into Salesforce themselves and having Idealist Consulting import it. Most organizations enter their donation data manually once they have migrated their starting data to Salesforce.
    - Some organizations with insufficient or inconsistent data preferred to clean up their records by importing or even manually entering their data. Conversely, other organizations with extensive or particularly good data also preferred handle their own data conversion in order to retain complete control over the process.
    - Even with professional importing, every organization required time to adequately review and edit data before and after the data migration; ‘you know your data best and will find errors that are impossible for anyone without your direct knowledge to correct’.
    - One organization running many events has struggled to find a simpler way to accurately import contacts for a very large event while avoiding duplications, particularly because the data comes in via paper and electronic files provided by event partners.
    - One partner entered their donation history by painstakingly using the sforce Connector, a free data-loading macro for Excel (that only works on Windows XP, not Vista) to import 500 lines at a time. It cued for the fields available in Salesforce and it was critical to make an exact match with these fields column by column.
- ✓ For staff members with competing responsibilities, the biggest challenge can be delegating database issues without having enough time to personally become comfortable with the system at the outset of the transition.
- ✓ Only one land trust is currently using the Land Tracker application. Idealist Consulting developed Land Tracker with this partner. This application is offered at no cost to all Salesforce users; currently about twenty land trusts use this application which resulted from RILWP’s work on this topic.
- ✓ The partners transitioning from the old non-profit template felt that this additional

adjustment went smoothly.

- ✓ Overall, time and manpower issues do play a significant role in getting up and running on Salesforce. Some partners acknowledged this in advance, set deadlines and were pleased that they could dig in to get it done. Others without enough time or manpower were equally satisfied to take their time and acknowledge that it would take longer to make a complete conversion.
- ✓ Here is some of their advice:
  - Be sure to have the in-house technical capability to make the transition and have a mentor in the start-up phase.
  - Be sure to set a deadline with a realistic date and then commit your efforts to meet it.
  - Be sure to spend time thinking through your data needs – discarding unneeded items, streamlining and simplifying your entries. Realize that it will never be perfect, but be flexible. Don’t let your data collection get out of hand or it will quickly become unmanageable.
  - Work with your Board to educate them about the software and adopt it as part of the strategic organization plan. Don’t be afraid to go slowly if necessary, but make sure there is consensus supporting the change.
  - Have someone familiar with Salesforce to guide you; clarify what you want by focusing on communications capability; think carefully about your organizations goals for using the database; don’t delete past donors – establish membership and donor categories that make sense for your organization, but include categories for ‘deceased’ and ‘moved’ so you will be able to track the growth or shrinkage of your organizations contacts over time.
  - Have a consultant for training and tips as you get started.
  - Importing donation history is more difficult than importing contact information. Consider carefully the amount of donation history that is truly needed.
  - It helps to have good data ready for importing to Salesforce. It may be necessary to add temporary fields and also to delete fields that are no longer important – anything that no one will care about two years from now. It is easy to get too specific in keeping data, but better to pare it down wherever possible.
- ✓ Most partners were pleased to start with the RILWP template developed with Idealist Consulting and work to gradually adapt it to their specific needs. These adaptations have come in phases as the partners become more comfortable with Salesforce and gradually expand their use of the software to new uses.
- ✓ One partner probably would have been more satisfied starting with an un-customized, standard version of the Salesforce non-profit template. It is important to note that they learned about Salesforce through the RILWP project. They started with a strong database and two volunteers already proficient in other database software led the transition although their experience was not specifically in CRM.

IMPLEMENTATION

- ✓ Every group used Salesforce to record donations. Some groups solicited memberships or dues, but as a practical matter, no group is currently recording these gifts using the membership module in Salesforce. Although RILWP thought the membership module would be useful, membership for our partners involves receiving a newsletter and perhaps voting at the annual meeting rather than conveying privileges such as admission to events or properties.

- ✓ Some partners are actively using the memorial and honorary donations.
- ✓ Campaigns/events is the other area that seems to be universally used by the RILWP partners. Some groups use it more extensively - every donation is linked to some campaign. Use of campaigns has been a significant benefit for at least one partner that now has the capacity to send a single renewal reminder. The reminder prompted roughly 30% more campaign participants and an equal amount of gifts above the initial membership mailing. Another partner has successfully used two Salesforce campaigns to separate and track a single fundraising event with two levels of tickets. Partners are also working to expand their use of events to include contacts who have attended non-fundraising events throughout the year in their Salesforce database because these attendees are potential, but previously overlooked, donors.
- ✓ Only one partner has been actively using the volunteer features including property projects throughout the year. Other partners are beginning to expand their use of this area. Three partners have customized fields to include their specific Boards, committees and volunteer positions.
    - One organization found that the standard volunteer fields in Salesforce didn't truly meet their needs in managing volunteers. Thinking through their specific needs, this group determined that volunteer skills and specific activities would be noted in the open-ended volunteer description field rather than ask their data entry volunteers to attempt to standardize an offer to volunteer into a limited set of pre-determined options. This group plans to scan through all volunteers, reading this description field whenever looking for volunteers. It is felt that this level of personal study is essential in understanding a volunteer's interests and responding appropriately to their offer of help. Their volunteer multi-picklists have been modified to include board and committees including the specific fundraising committees/teams dedicated to the organizations campaigns and events.
    - One partner has been able to rely on Salesforce project listings by property to generate useful supporting information about specific volunteer efforts for grants and letters to major donors. It is not possible to easily tally volunteer and project volunteer hours. For projects, project manager and average project volunteer hours are included in the description. It would be nice to be able to compute cumulative hours for each volunteer and for each property for grant and recognition purposes.
    - For one group, volunteers are tracked via organization account affiliations using the affiliations module in Salesforce. This alternative method is more advantageous for this group because the primary volunteer relationship is through the organization. Future efforts may also track subsets of these volunteers' interests using the contact based volunteer fields.
- ✓ Utilizing the Land Tracker application was of interest to all of the Land Trusts. The major limitation for monitoring is the lack of storage capacity for photos and maps. Some land trusts are entering neighbors for each property in order to include this constituency in solicitations and education efforts.
    - For one land trust, use of Land Tracker has been a lower priority because they would prefer a program with built-in GIS capacity with photo and map keys for their monitoring reports such as those provided with software offered by 'Kiva'.

  - One trust actively uses the Land Trust Alliances online storage site for Board minutes, Bylaws, Board and Advisor lists, Committee meeting minutes, and other documents. This secure site also offers a ‘white board’. (Per Wikipedia: The term *whiteboard* is used metaphorically to refer to features of computer software applications that simulate whiteboards. Virtual whiteboards allow one or more people to write or draw images on a simulated canvas. This is a common feature of many virtual meeting, collaboration, and instant messaging applications.)

- ✓ Although watershed groups might make use of the Land Tracker application in a similar fashion (even though they wouldn’t own the ‘property’), no group has chosen to organize their database in this fashion.
- ✓ Only one person routinely uses the task feature in Salesforce (Helen). Others are already using similar features in Outlook. For most organizations, there is not enough of a network of users in their database to make the most of this feature. For similar reasons, no group is using the calendar available in Salesforce.
- ✓ Mass email is a critical feature for some groups. Those already using Constant Contact, which does not yet have a reliable integration with Salesforce, are stuck making contact entries and updates within two programs. One group is pleased with the mass email features contained within Salesforce for both creating and sending emails. But for larger, more frequent mailers and those preferring email templates another option is available. Vertical Response is currently being considered by at least one organization. It offers integration with Salesforce and includes 10,000 free emails per month for nonprofit organizations.
- ✓ No partner mentioned sending regular emails from within Salesforce and no user had linked their email to their Salesforce account.
- ✓ One partner has experimented with dashboards and others have indicated that they would use this feature at some point in the future.
- ✓ Some groups attended in the June 2nd Donor/Member Retention Workshop, but participants had mixed feelings about the usefulness of applying this information to their own Salesforce database. In some cases, the first round of solicitations after the workshop occurred with the recent year-end appeals. One group was well prepared to produce this type of analysis prior to the workshop and another already had reports that compared some of the workshop analytic data across several years. The RILWP has made the workshop PowerPoints and report ‘recipes’ available on their website for future learning.
- ✓ For organizations which have completely transitioned onto Salesforce, some organizations still track information separately for: Constant Contact, volunteer stewardship, project volunteers, committees, boards, personal email contacts, grants and event participation. In some cases, event participation is tracked and then supplied by an event co-sponsor requiring additional work to prepare this information for import to Salesforce.
- ✓ Every group added custom fields. One common addition was a picklist for mailing preferences. Others added checkboxes for specific purposes such as communications or donor status. With the rollup features included in the account record, there is less of a need to add join or lapse dates as the first and most recent gift dates can be used for sorting for active and inactive donors. Some groups changed or added over 25 fields on the contact record (which has the most standard field options). By contrast some groups simply modified a few of the available picklists.

- Some groups have successfully setup 'reference' fields so that a single field can be viewed on two records, for instance, both contact and account pages, but is 'locked' as 'read only' on one record so that the field can never get out of synch.

- ✓ Reordering page layouts for convenience and to reduce 'clutter' or entry error was a common and useful practice of all the partner administrators.
- ✓ The partners are always requesting that donors provide contact information as part of the solicitation process, but this information is difficult to obtain.
  - Many organizations are actively working to obtain and update contact emails, especially as part of efforts to 'go green' and to reduce costs. The organizations with the most emails are those with the most events where they are personally collecting the email addresses as part of the registration process.
  - One organization would like to hold a phonathon with their team of callers entering data simultaneously into the organization's Salesforce database as they make the calls.
- ✓ Issues with Salesforce software data entry include:
  - Salesforce data entry is not as smooth as expected because there is no automatic or simple way to copy name, phone, address and email between the contact and account records. You should be able to expect that an address update in the contact record, for instance, would automatically update within the household account record.
  - There are just too many steps just for linking a donation with a donor and donors with campaigns; this should be automated within Salesforce.
- ✓ Suggested improvements to the Salesforce non-profit platform include:
  - Whenever a donation is linked to a campaign, that donor's campaign history should automatically be updated to "Responded" and if they weren't listed for that campaign, they should be automatically added.
  - For a donation, "donor" should be the default rather than "none" for the contact role.
  - Accounts, especially household accounts, should have a button to copy an address to the contact records. (Current button does not work.)
  - Contact records should have the same button so that updates on the contact record can get copied to the account record for address and phone.
  - Computational fields for summer addresses based on date fields - a necessary tool for communities with many summer only residents should be added.
  - Flexibility in selecting the campaign roll-up report should be provided.
  - Modification of the layout of the accounts page should be allowed.

- ✓ None of the partner organizations uses or feels the need to use leads or cases. These features were hidden in the RILWP version of Salesforce and it appears this was a good assessment of our group. One organization adds potential members with a status of 'trial' to segregate them. Others add all event attendees to contacts; some add only when a gift is made. The current size of the partner databases ranges from approximately 500 to 2000 accounts – households and organizations.
- ✓ Salesforce appears to be capable of collecting any type of contact, donation and organization data our partners would want without much need for additional professional programming. As noted in the recommendations, this can be both an advantage and a

disadvantage, as care is needed to think through the intended use of this data.

Utilization

- ✓ The partners most actively using Salesforce have been creating their own views and reports routinely. Standard reports provided with the non-profit template are viewed as a convenient starting point, but not seen as useful without adaptation.
  - Some partners create reports and views specifically for proofing their data.
- ✓ For more recent or less active adopters, the reporting features of Salesforce are often a source of insecurity or confusion.
  - The standard reports often don't produce the anticipated results.
  - The open-ended aspect of the reporting features is powerful, but can be overwhelming, especially when figuring out the best combination of reporting against available objects (contacts, campaigns, donations, accounts, etc) to draw into a single report.
  - The built-in campaign roll-up report provided by Salesforce is not very useful. It is a default report in Salesforce that is insufficient and can't be modified. It requires too much time to identify the source of any differences between the donation total in the rollup report and the respondent count, because this report does not reveal the details within the totals necessary to figure out the specific donations where the contact campaign history did not get updated.
- ✓ Only two groups have experimented with tables or graphs available in Salesforce; many partners are more comfortable using Excel for this role and most partners did not use tables or graphs in their analysis.
- ✓ Organizations are all adjusting to Salesforce; those who have moved completely onto Salesforce and those using it the longest are most comfortable. Time and manpower are issues for those partners not completely at ease with their new system. Volunteer turnover and staff cutbacks have substantially impacted more than half of the RILWP partners this past year.
- ✓ Some organizations are using nearly all the available user licenses, but each group seems to use roughly three licenses most intensely. It has been helpful for some groups to issue the mentor an admin license so that assistance can be given over the phone while working together online. This strategy has allowed for quick answers or report fixes and even password help as needed between in-house training sessions.
- ✓ Data is input by both staff and volunteers depending on who is available to the organization. Whether staff or volunteer, it was an exception to the rule to find someone already familiar with Salesforce or another fundraising or CRM software. However, most groups were able to rely heavily on volunteers or staff with expertise in the use of computer software for other purposes. Organizations worked best with a team of two admins to function as team to get started and to stay running smoothly on Salesforce. Partners were often able to find volunteers with a computer background who were interested in this type of volunteer work – some younger volunteers and some retirees.
- ✓ Salesforce users rarely relied on the RILWP tipsheets. Working one on one with someone familiar with Salesforce was highly preferred. Online help available within the Salesforce website was another preferred resource. Very few users tried the online training courses. The reason given for these learning preferences was the time factor and specificity to their organization and most pressing needs. It was challenge enough to adapt to new

software without getting information not needed for the task at hand.
- ✓ Comments on training:
  - Salesforce should consider setting up online training specifically for nonprofits. The online training available now is meant for situations and structures more typical in for-profit businesses.
  - One-to-one or one-to-two in-house training in sessions of no more than and an hour and a half to two hours produced the greatest learning gains. Four partners are planning to have several more training sessions with Helen.

- ✓ Boards are rarely exposed to Salesforce reports, but often the data is further distilled for them. Development, membership and campaign committees do often review reports created on Salesforce as a part of their work.
- ✓ Treasurers seldom work with Salesforce to proof campaign or donations totals. The accounting process and tracking within Salesforce are surprisingly separate in every partner organization.
- ✓ Groups using printers to perform mail merges for professionally printed communications used Salesforce to produce the mail merge files without problem. Other partners printed letters and labels in house. Insuring that the selection correctly included or excluded the correct accounts was more of an issue than pulling the correct fields, especially using the new non-profit template with its donation roll-up fields.
- ✓ Online secure data storage is a key benefit for the partners.
  - Be sure to save all your data manually at least weekly and especially before using the 'LexiLoader' for manipulating your data.

Expansion

- ✓ All groups believed that using Salesforce already had or would increase their capacity in every functional area they utilized. Partners believed that there was more to explore in Salesforce and in the available applications that would further benefit their nonprofit. Organizations that did not feel they had completed their transition were not yet experiencing a positive boost to their capacity, but remained committed to Salesforce as their CRM solution. Organizations with the longest experience using Salesforce were currently expanding their use of the system to new areas and they anticipated further growth in their capacity to reach out to donors and volunteers.
  - Moving away from paper and electronic records that were limited to a single computer onto a system that can be shared among volunteers has been very empowering. For volunteers, each working remotely, Salesforce is a very practical and low cost solution for running fundraisers, keeping everyone up to date and avoiding information bottlenecks.
  - Once a campaign is completed, it is really possible with Salesforce to analyze how many new people participated in a campaign and how much these donors gave. Subsets of campaigns can be successfully analyzed to fully understand the results that specific components added to the campaign.
  - More than one partner has found Salesforce to be entry intensive; there is a need to streamline data entry processes to achieve more benefits.
  - One partner 'absolutely couldn't dream of going back' to the previous practices with multiple locations, mixed paper and electronic records, no coordination and no standardization.

    - The biggest improvement has been the uniformity of the data and the ability to do a follow-up mailing for the membership campaign.

- ✓ Partners, especially those who feel their transition to Salesforce is complete, are exploring new applications for Salesforce as they are needed. Email and task automation hold the greatest appeal. Organizations are reluctant to lose their personal touch to automation contrary the widely promoted environmental idea of 'going green' by going digital. Two reasons cited are: the desire to have a personal touch when working within Rhode Island's small communities and the expectation of donors to receive a mailed acknowledgment letter as a valid expression of appreciation.
- ✓ Not all partners feel that they could benefit from additional workshops. Issues include lack of time and lack of specificity to their organization. Two topics of interest are use of email in Salesforce and through other providers and designing reports in Salesforce.
- ✓ There is not a strong interest in having a formal ongoing network of Salesforce users. Time is again the key issue. Some partners would like a once yearly opportunity to network, but distance and time are still an issue for both staff and volunteers so much so that some partners indicated that they would be more likely to participate in a phone or web-based meeting.
    - *Lori Urso would be an excellent workshop speaker. She has developed and used many strategies to build a donor base with 'guerilla' marketing' using sweat labor rather than dollars. Her ideas included reaching out to 'Welcome Wagon' and using real estate listings to reach new donors*
- ✓ Universally, partners indicated that they felt that they could help answering questions for others. There was some interest in having an informal network of users who could call upon each other for answers to Salesforce questions. The offered assistance ranged from helping other organizations considering adoption of Salesforce to quick advice given by phone or email to other partners. Time availability is again a strong constraint.
- ✓ There was also interest from some partners in professional on-demand support in their use of Salesforce. One partner has contracted for professional back-office services to manage its database.
- ✓ One partner had both admins participating in the Salesforce Nonprofit Google Group They found it useful in finding answers to questions, learning about how other nonprofits are using Salesforce and learning about new applications and features.
- ✓ There was mixed interest in having a RILWP network of Salesforce volunteers. There were wide variations in whether the volunteers would need to work in the office or remotely, whether they should be from the community or not. It did not seem to matter whether volunteers had previously worked with Salesforce although one partner had one volunteer using it in their day job. Most did agree that experience working with some computer software was very helpful. Some successful volunteers have had minimal computer experience, but a strong desire to learn. A formal job description did not seem as critical as personally asking for help from someone who could be trusted. Some organizations had written job descriptions that were never used.
    - One partner emphasized the key element for each of its volunteers is a focus on a goal. Using Salesforce is just one component of achieving their goal, not an end in itself. All volunteers will learn to work with Salesforce, but they have a role in the organization that drives their use of Salesforce. Many of these volunteers work on fundraising events with a specific start and end date.

- One organization has been very successful in requesting 'database volunteers' and finding volunteers who respond to this description and to committing time each week dedicated to Salesforce data entry.
- One organization relies on summer interns from outside the community to enter their data and work on a summertime fundraiser.

CONCLUSIONS

- The current economic downturn has had a significant impact on RILWP partners resulting in staffing and financial cuts and volunteer turnover, changing the landscape for the time and manpower needed to implement a major software adoption.
- Adoption of Salesforce has increased the capacity of all partners who have completed their implementation. These partners are steadily expanding their use of the software with the expectation of continued benefits in efficiency and capacity.
- The strongest adopters, whether staffed or all volunteer, whether office-based or 'office-less', had a leader who believed in the benefits of the Salesforce and drove the transition process.
- A surprising range of strategies has been proven successful:
    - Quick transition with firm deadlines *and* gradual, open-ended transition
    - Clean data to start, building from poor data *and* post migration cleanup and proofing
    - Volunteers focused on data entry *and* volunteers focused on programs where data entry is one part of their duties
    - In-house technical expertise, building expertise *and* hiring expertise
- Salesforce online 'help' is a great resource, but partners are also ready to share their knowledge with fellow nonprofits.
- Supplemental in-house training and services have been an essential support for organizations building their technical expertise, especially because time and manpower have been such severe constraints.
- All organizations benefited from the RILWP leadership in investigating Salesforce, establishing a template and leading the learning process.
- Salesforce has been a good platform for RILWP partners offering great flexibility, great capacity and evolving technological improvements.
- The counterpoint to Salesforce's flexibility is the open-ended nature of the decision-making needed to set up the database, manage information and run reports.
- The Land Tracker application has been a unique, offshoot benefit available for land trusts in and beyond the scope of the RILWP.
- Salesforce has been a very good platform for RILWP partners from a cost perspective. There is no escaping the maintenance effort involved with a CRM program, but the lack of ongoing monthly service costs, limitations on database size and upgrade costs is vital to our small organizations.
- The investment in collaborative thinking and startup funding made by RILWP into the Salesforce adoption project has been a great benefit for the partners with ripple effects to small environmental non-profits beyond the immediate RILWP partners.