



salesforce npSP

Case Study

Salesforce NPSP Implementation for a Nonprofit

Salesforce Nonprofit Success Pack (NPSP) implementation for an international nonprofit resulted in improved donation management, donor management, donation management, and overall operational improvement and increased productivity.



About The Customer

They are an international non-governmental organization (NGO) based in New York City with operations across the globe. They provide major contribution in the environmental certification for sustainability in forestry, agriculture, and tourism. They run training & certification program to train farmers, peoples and provide certificate seal which gives information to consumers about business practices, based on certain standards they set.

They recognized as an international alliance of farmers, forest communities, companies, and consumers committed to creating a world where people and nature thrive in harmony.



What Customer Was Looking For

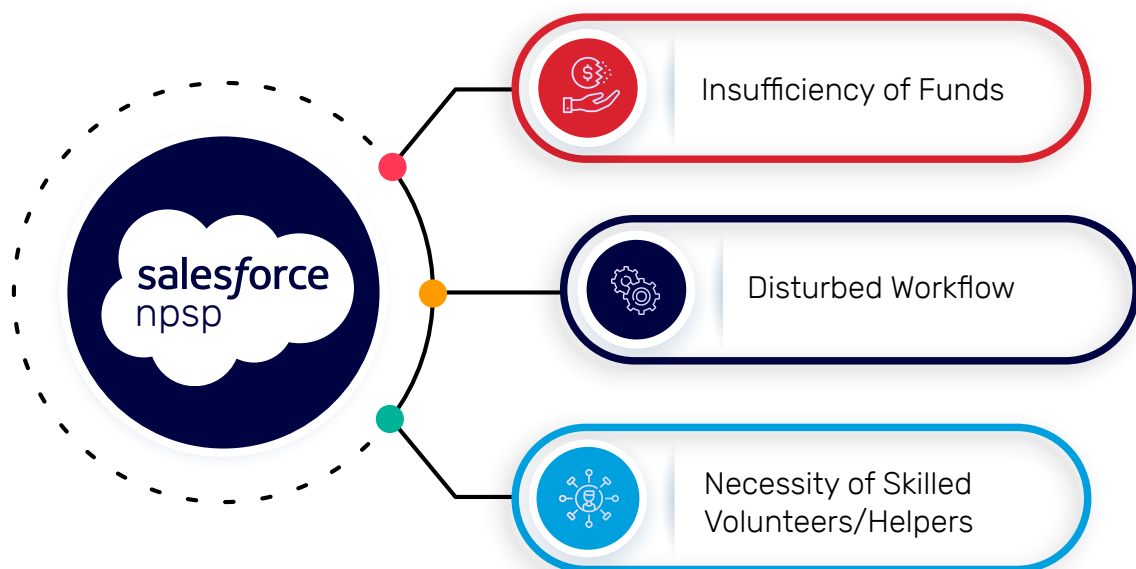
Customer was operating their business and managing their different dept. and business processes using multiple IT Systems, tools like: Outlook, SharePoint, different fundraising system etc. Which was very hectic earlier to manage all the information regarding the business partners, departments, and customer etc.

Challenges

- **Complexities in data management:**
They have different types of business data from donors, vendors, customers, and partners. Like: Donation information, Opportunities, Grants, Agreements, Allocations, etc.
- **Messy process to track information:**
They did not have centralized system where they can manage & track their Opportunity, donations, campaigns, Grants and their flow of finances etc.
- **Sensitive Document Management:**
They didn't have a centralized place where they could store or manage their sensitive documents like: Contracts, Agreements, Payment records etc.
- **Workflow Implementation:**
There was no authentic automation setup was they're for process-based approvals, like: Agreement approval for Compliance department, Grant approval, etc.
- **Relationship tracking**
Earlier tracking of relationships between contacts, donations, and recurring donations etc. was a time taking job.



NGO Challenges That Salesforce NPSP Solves



Goal/Objective

They came to us and discussed the major pain points of the business. So that it could be addressed, and better solution could be adopted which will help business in streamline all the processes. so that they will have 360-degree view of their business partners, customers, vendors etc. through a centralized IT-System.

A close-up photograph of two hands, one from a person with darker skin and one from a person with lighter skin, holding two interlocking wooden puzzle pieces. The background is blurred, showing what appears to be a laptop screen. The puzzle pieces are light-colored wood.

Solution

Based on our initial fact-finding discussion, we understood that client's long term organization objective and their vision. We proposed to adopt Salesforce NPSP solution that could manage all constituents effectively, enhance operational efficiency, and provide a one-stop-shop for all their organizational needs.

- **Data Management:**

By using the NPSP Cloud, we have successfully deployed the solution for business where all the business data (Donations, Gifts, grants, Opportunity, Account, Agreements etc) is categorized and managed through separate constituents of NPSP. We build different automations & implementations, so that data is being easily pushed and created in salesforce and managed.

- **Easy Information tracking:**

The solution makes it very easy to maintain and track the business data in a centralized place with proper mapping. Like: user can have clear picture of each donation, their prospects, account, contacts as well as related contracts and opportunities.

- **Document Management:**

We have user salesforce attachment and chatter feature so that users can create, store, and collaborate on business documents in salesforce itself, so that external system dependency could be reduced.

- **Workflow Automation:**

By using lightning flows and automation scripts we have automated different approval & review processes of business which eliminated the extra delay of manual interaction.

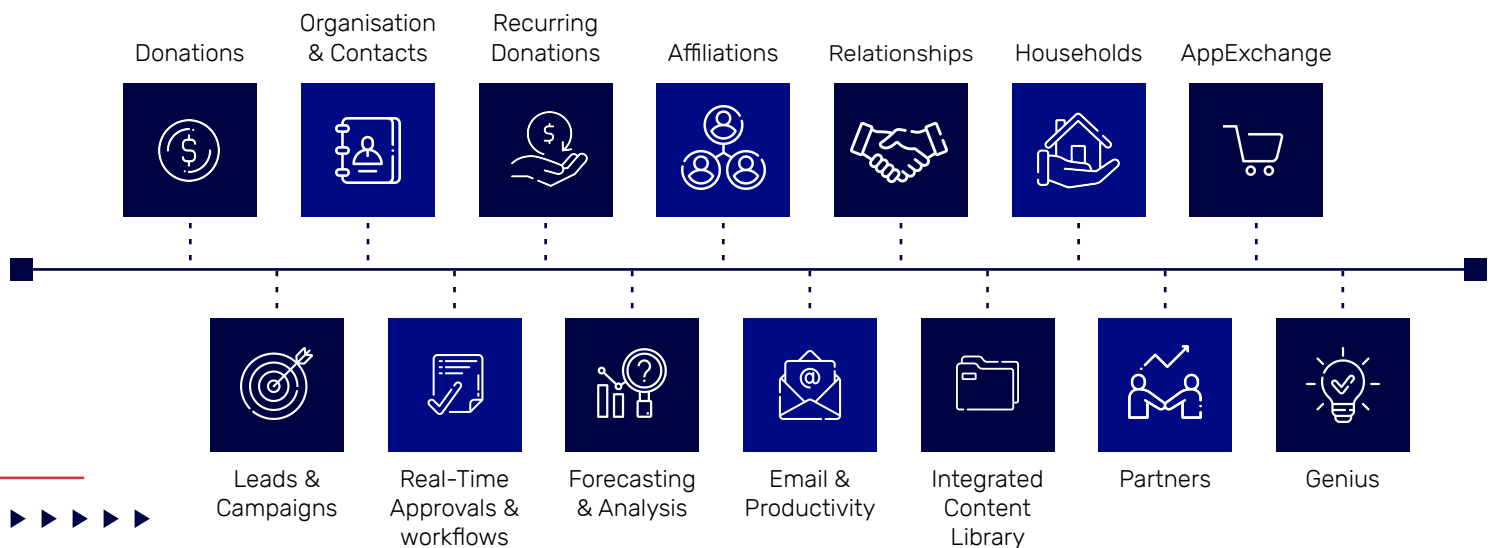
- **Better Business Insights**

This centralized system helped business keep track the process activities and also it helped higher management to see the organizational progress using powerful salesforce reporting/analytics.

Results

The implementation has helped client streamline their processes, manage, and track constituents more effectively, thus ensuring significant improvement in operational efficiency. The Nonprofit Success Pack adoption helped the nonprofit achieve their goals in business with proactive approach and planning.

Salesforce CRM Plus the Nonprofit Starter Pack



Reach Us

To Discuss Your Requirements

Contact us at : info@webuters.com

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