7 Steps for a Successful Salesforce Implementation

Salesforce® can integrate all of your nonprofit's business processes into one system. You might be interested in a case management system, a better way to fundraise and report, a program management solution, a system for managing your organization's outcomes, or all of the above. All types of nonprofit organizations can benefit from Salesforce, including human services organizations, foundations, and education nonprofits.

Because Salesforce is so configurable and can integrate seamlessly with so many applications, Salesforce implementations can be an efficient process. With a little bit of preparation in advance, you can ensure you get the most out of your system and lay the groundwork for successful adoption.

We recommend you begin by defining your goals, bringing together stakeholders, and making sure you have a clear idea of how the system will help you. Next, find a consultant you trust to implement Salesforce. You do not need to be an expert in Salesforce at this moment, but you will ultimately need someone on your team to take ownership of working with the consultant, designing the aspects of your system in partnership with them.

In this paper, we'll highlight seven key areas to consider when planning to implement a Salesforce system:

1. Vision
2. Salesforce Champions
3. Data & Integrations
4. Timing
5. Licenses
6. Training
7. Sustainability

Checklist: Vision and Salesforce Champions

Use the following tips to help you prepare for a new system.

1. Define Vision.

Identify your organization's key business processes -- virtually all can be managed in Salesforce. Be specific. This can be anything from donation management to application management to case management.

You may already be able to name some organizational processes that aren't working or could be more effective when supported by a new system. However, we recommend you take a step back and evaluate your organization's needs based on your mission and vision. For instance, if you've done theory of change work, identify the processes that are most crucial to achieving that change. Also note the data required to measure your outcomes against it. Looking at the bigger picture will help you identify where a Salesforce system will have the biggest impact.

Don't worry if some processes get left out -- many organizations build their Salesforce systems up over time, adding features as needed. Salesforce can help you manage virtually all the processes in your organization, so you may want to prioritize what to address first.

Key Tips:

- Identify the processes that are key to your organization's mission and vision.
- Prioritize your processes based on your organizational values and mission-critical workflows.

2. Find Your Salesforce Champions.

You will need buy-in from your executive leadership. Executive investment is critical to the success of the project, as a system implementation can be stalled or even undermined if its initial direction is not approved from the beginning.

Next, you will need to identify and designate a project manager and subject matter expert. The Project Manager and subject matter expert(s) will work with your implementation partner to ensure that organizational feedback is factored into your system's design. Make certain that they have availability and deep knowledge about your business processes. Consider also any external constituents who may access the system and whose feedback you need to collect in advance or during the implementation.

Finally, you will need to designate the person or team who will administer the system after deployment (System Administrator), which may be the same as those who manage the implementation. Ensure they have the ability and capacity to take ownership of the system.

Data and Timing

Key Tips:

- Identify and reach out to the key people in your organization who will need to participate in the project.
- Determine who needs to approve the system, and which staff members will be influential in convincing other staff to adopt it.
- Ascertain who will administer and provide support for the system after it's deployed.

3. Map Data and Processes; Consider Integrations.

Once you've chosen the processes you want to address, you may want to map out each process step by step. Focus on understanding the objectives, people and resources involved. Your implementation partner may provide questionnaires to help you outline these processes.

Next, take inventory of your systems and data that needs to be incorporated into the system, and validate your findings with subject matter experts for your programs. Sometimes the data may be spread across multiple sources (databases or people). Also identify tools that need to share data with your system, such as those for mass email. Discuss early with your implementation partner in what format the data will need to be collected for migration to your new system. You may also want to "cleanse" your data to make the process smoother (for instance, by removing duplicate records or out-of-date contact information).

Key Tips:

- Map out each key process to understand what your system needs to cover.
- Identify and write down all of the data sources and systems that would need to be migrated into Salesforce. Determine how clean and accurate your data is, and cleanse if necessary.
- Note if you may want to collect any information from constituents on your website.
- Consider if you want to use Salesforce data in other applications like mass email or Outlook/Gmail.

4. Plan Your Timing Carefully.

Implementing a Salesforce solution requires dedicated time from your staff that they may not have during your busiest seasons. Ask your implementation partner for an estimate. For instance, if you want to manage an application process through Salesforce, you should not implement a new system during your application period, as it's unlikely the staff with the most knowledge of the process will have time to spend in project meetings.

Key Tips:

- Pinpoint a slower time in your fiscal year, when you can spend more time on a technology project.
- Be aware of times (such as during an application cycle) when you should not implement a new system.

Licenses and Training

5. Think About Licenses.

Your nonprofit is eligible for 10 free licenses from the Salesforce.com Foundation and deeply discounted licenses after the first 10. The Salesforce.com Foundation is based on a simple idea: leverage Salesforce.com's people, technology, and resources to build collective knowledge and enable action to improve communities throughout the world. This integrated philanthropic approach is called the 1/1/1 model. Through the Salesforce.com Foundation, Salesforce.com donates 1% of their employees' time, 1% of the company's equity and 1% of their product to nonprofits.

Consider how many people will need licenses to your new Salesforce system. There might be users that only need access to limited features. Depending on the access needed and the system design, different lower-cost Salesforce licenses may be an option.

Key Tips:

- Take note of how many of your staff or external constituents (e.g. board members, grantees, applicants) would need access to Salesforce.
- Determine the level of access they need. (For instance, they might only need access to contact information.)

6. Prepare For Training.

As we discussed in an earlier section, you will need to have both a project manager for implementation and eventually a trained system administrator on staff. It will be very helpful for these team members to have some technology aptitude, and to have exposure to Salesforce so that they can more effectively participate during your implementation. Most implementation providers and Salesforce.com provide training on using your system and Salesforce in general.

Also consider how you may prepare for your staff to adopt your new system. Can you develop some brief, visually clear training materials in-house and prepare for staff trainings? We recommend keeping it simple and emphasizing the relevant features for each staff role. Also think about what staff stand to gain by transitioning to these new processes and how you can express these benefits to them.

Key Tips:

- Familiarize yourself with the Nonprofit Starter Pack, which most nonprofits will use in some way in their Salesforce system.
- Plan a schedule of your training process, both in materials creation and training sessions. Consider the need for followup trainings until each staff member is clear.
- Refer to your Salesforce champions from Step 3 for support of the new system in each of your programs or services.

Sustainability

7. Embrace Flexibility and Make It Sustainable.

We recommend approaching your implementation with flexibility. One pitfall nonprofits run into is trying to do everything at once. We encourage you to pace yourself and have an ongoing budget for maintaining and enhancing your system. It's like building a house and making improvements to it as needs change. Salesforce is an agile system that is intended to adjust as your organization does. Think of iteration, rather than a one-time permanent installation.

Key Tips:

- Know what's critical and of highest priority.
- Leave room to grow.

Overview

By incorporating the tips above, you are on your way to a successful Salesforce implementation!

1. Define Vision.

2. Find Your Salesforce Champions.

3. Map Data and Processes; Consider Integrations.

4. Plan Your Timing Carefully.

5. Think About Licenses.

6. Prepare For Training.

7. Embrace Flexibility and Make It Sustainable.

About Us

Exponent Partners

Exponent Partners is a mission-based software consulting firm that helps nonprofits and foundations use technology to build capacity, improve reporting, further missions, and increase impact. Exclusively focused on the nonprofit sector, we build cost-effective solutions on the Salesforce.com platform that manage fundraising, student data, client cases, and organizational outcomes.

We've worked with over 300 large and small nonprofit organizations on over 900 projects in our 10-year history as one of the leading partners of the Salesforce.com Foundation. Our expertise is in human services, education, foundations, and social impact; and we offer services, products, and solutions based on each client's unique needs, time, and budget.

As a Certified B Corporation, we pursue our world-changing vision of revolutionizing the social sector by providing technology that makes the whole sector more effective.

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