

# Salesforce with Fíonta

## Constituent Relationship Management and Engagement for Nonprofits & Associations

**Founded in 2001, Fíonta is a certified Salesforce.org Premium Partner and works with nonprofit organizations and associations.**



Salesforce provides the opportunity for nonprofits and associations to have a unified view of every interaction with clients, supporters, members, funders, volunteers, and affiliates and customized configuration is achievable with “clicks, not code.”

CRM systems centrally store your organization’s contacts—people, households, phone numbers, email and mailing addresses, the history of interaction(s), and more. With Salesforce as an organization’s system of record, all engagement with constituents, members, volunteers, donors, and more can be tracked and measured.

The Salesforce CRM can be extended to improve and enhance constituent engagement through a web-based engagement platform powered by Experience Cloud and email marketing automation for personalized, branded experiences at scale with Pardot.

## SERVICE AREAS

### » EVALUATION & DISCOVERY

- Determination of whether Salesforce is the right solution for your organization and the creation of an implementation plan and estimate.
- Documentation of requirements for integrated contacts, donations, grants, membership, volunteers, events, marketing automation, and/or program management.

### » CONFIGURATION & CUSTOMIZATION

- End-to-end configuration and customization of Salesforce products.
- Customization of Salesforce including volunteer tracking, program management, impact measurement, grant distributions, and more.

### » IMPLEMENTATION

- Salesforce Nonprofit Success Pack (NPSP), Sales Cloud, Service Cloud, and Grants Management.
- Marketing automation consulting, customization of Pardot and Marketing Cloud, and user interface design of mobile-friendly marketing emails and landing pages.
- Experience Cloud integration and customization for member or constituent portals, and integration of Salesforce with open source websites like WordPress and Drupal to display Salesforce data.

**Salesforce.org provides up to 10 free NPSP licenses to nonprofit organizations. Additional licenses are 80% off retail pricing.**

# Salesforce.org Nonprofit Cloud

Nonprofit Cloud is an exciting set of technologies designed by Salesforce.org to help nonprofits, foundations, and associations build capacity and scale with ease.

Solutions within the Nonprofit Cloud include:

## nonprofit success pack

**Salesforce Nonprofit Success Pack (NPSP)** is a set of packaged Salesforce configurations that enables nonprofits to use Salesforce “out of the box” as a CRM to manage constituents, programs, and communications data. NPSP was developed for nonprofits with the unique business needs and processes that differentiate a not-for-profit from a for-profit front and center. 60+ reports are included in NPSP, such as *Members who have renewed in the last 60 days*, *Development Forecasting*, *Accounts that Donated Last Year, but Not this Year*, and many others.

## salesforce community cloud

With **Community Cloud** (now called Experience Cloud), nonprofit organizations and associations can build and support secure web-based portals. Think of a Community as an online town hall where groups of constituents (donors, volunteers, board members, etc.) can collaborate and interact in real time, access required documents, and even manage their own

account information. The Community management console provides nonprofit staff with high-level and deep dive insights into Community engagement with reports and dashboards.

Experience Cloud provides three out-of-the-box templates. for quick configuration or it can be customized to meet your unique User Interface (UI) design requirements. Lightning Community Builder provides drag-and-drop tools, so you can continue to extend the experience after the initial setup without a deep technical staff.



**Salesforce Pardot** is a robust marketing automation software that provides a 360-degree view of individual constituent behavior across your organization’s website, social media, and other digital channels. Customized email marketing, landing pages, and forms can be designed and managed within Pardot and all user interactions are recorded at the contact level. Create email nurture campaigns to deliver personalized and relevant communications at scale. Based on response, and as you learn more about each constituent, you can trigger additional communications, add users to lists, adjust the user’s engagement score, send the user to a member of your Development team in Salesforce, etc. The possibilities are endless. And, at the end of the day (or a campaign, a fiscal quarter...) view return on investment (ROI) reports in Pardot and understand exactly how a particular initiative performed.