



7 Steps to Prepare For Your Salesforce Implementation



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Focused on working directly with our Salesforce partners to help nonprofits in their evaluation of modernizing their fundraising strategies and enriching their data insights.

Webinar Agenda

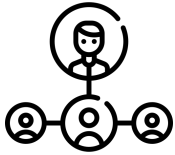
1. Planning Philosophy
2. Evaluation Framework
3. Short Term Wins + Long Term Plans Deep Dive
 - Client Win — Xavier Mission
4. Key Takeaways
5. Contact / Q&A

Planning Philosophy & Framework Genesis

Why do you need a framework?



Why is an **Evaluation Framework** important?



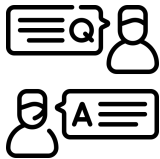
Establishes client and vendor project team from the start

- Reduces risk in transferring knowledge and responsibilities to actual project work
 - Allows vendor to align resources accordingly
-



Eliminates redundancy of efforts

- Involves the right people (client & vendors) at the right time
-



Provides clarity and answers questions

- "Is this a real project?"
- "Are we in the evaluation before THE evaluation?"
- "Are we really ready for a project/Salesforce/Arkus?"

Meet with Salesforce AE,
Salesforce Certified Partner,
3rd Party Providers, &
Legacy Systems Contact

Get Connected

1

Gather preliminary
proposals and estimates,
Complete Power of Us
Application

Do a Discovery

2

Determine who
from your organization
needs to be involved

Build Your Team

3

4

Confirm Alignment

Validate project, solution, cost,
and timeline align
with needs, requirements,
budget and resources

5

Finalize Contracts

Work with vendors
to refine and finalize
proposals, statements
of work, etc.

6

Commit

Navigate internal
approvals
for signature

7

Kick-Off

Start your project!

Evaluation Framework Overview

What do we mean by short term actions and long term plans?

Short Term Actions

Stand up Classy Campaigns for Giving Tuesday and Year-End Giving

Classy

How to Design a Compelling Giving Tuesday Campaign on Classy

CAMPAIGN NAME		HEADLINE OR CAMPAIGN LOGO FILE NAME
CAMPAIGN DATES	CAMPAIGN URL	

Tell Your Story

Create a deeper connection between your supporters and your mission, and help them feel like they are a part of the solution. Use clear and concise language that leads your supporters into action. People won't spend a ton of time reading your copy, so make sure to break it up into digestible chunks.

PROBLEM What's the problem we're facing? Why does it matter to you?	SOLUTION What's your organization doing about it?	ACTION What can your supporters do to help solve the problem?
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IMPACT BLOCKS
600px width recommended

IMPACT HEADLINE Note: This can also be your "action."

IMPACT LEVEL	IMPACT LEVEL	IMPACT LEVEL
IMPACT DESCRIPTION	IMPACT DESCRIPTION	IMPACT DESCRIPTION

Long Term Plans

Salesforce Implementation + Classy Integration

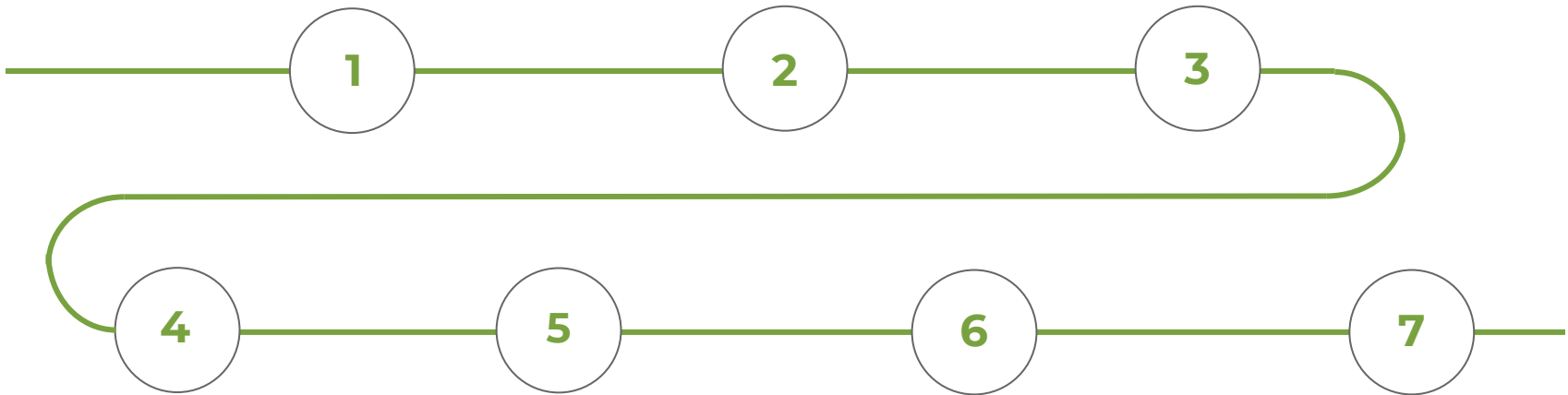




Determine your short term actions and validate long term plans

Get Connected

Do a Discovery





Xavier Mission is a "for-impact" organization providing basic services as well as opportunities for empowerment and self-sufficiency to New Yorkers in need.

Since 1983 Xavier Mission has welcomed, served, and empowered our guests with respect and dignity. We operate six programs that provide a continuum of care for those facing difficult times.

Xavier Mission



Challenge

Xavier Mission had an existing Salesforce Nonprofit Success Pack (NPSP) instance in place and engaged Arkus for our assistance streamlining their current processes and bring them over the finish line with their lightning migration.

In addition to moving away from the Salesforce Classic to Lightning interface, Xavier Mission was looking to:

- Optimize use of Salesforce Reports & Dashboards
- Finalize their Classy <> Salesforce integration
- Increase user adoption with minor configuration
- and layout updates



Results



Xavier Mission's current targeted campaign

Classy for Salesforce

nonprofit
success
pack

Classy



"As a small nonprofit, our implementation of Salesforce has been little by little over the years. When we needed a new fundraising platform, **we were immediately drawn to Classy for multiple reasons but the selling point was that it integrated with Salesforce.** In March, when COVID hit New York, our office shut down but our programs continued running and our need for funding increased.

Having Classy set up and integrated with Salesforce meant that we could launch a new COVID funding campaign and take care of all of our donor acknowledgement and management remotely. Having a service contract with Arkus throughout this time allowed us to make changes to our Salesforce and Classy instances that simplified and streamlined our remote processes.

Having the Arkus team available to help with all the small things that needed to be done has saved our staff so much stress, time, and energy during an extremely difficult period."

— Cassandra L. Agredo, LMSW, Executive Director, Xavier Mission



Donate Online

Serve and empower our guests by giving online.

Your donation will help ensure that we can continue our life-changing work in our community.

MAKE A GIFT



Trailhead: Create Your Implementation Blueprint



Trailhead: Salesforce Basics for Nonprofit Admins



Salesforce.org: Success Services



the power of **US**

How do I find my Salesforce.org Account Executive?

Key Takeaways — What can you do now?

- Get in touch with your Salesforce AE
- Review Success Resources
- Talk to a Certified Partner
- Connect with identified solution providers



“You miss 100% of the funds on the Giving Tuesday campaigns you don’t create.”

Wayne Gretzky
Michael Scott

Classy

Q&A

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Thank You!

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