



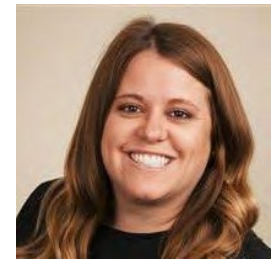
Empower Your Organization

# Unleash Your Nonprofit's Fundraising Cloud Strategy

July 19, 2022

# Zoom Tips

Today's facilitator is Tracy Thompson



- **Ask Questions in Q&A Box**

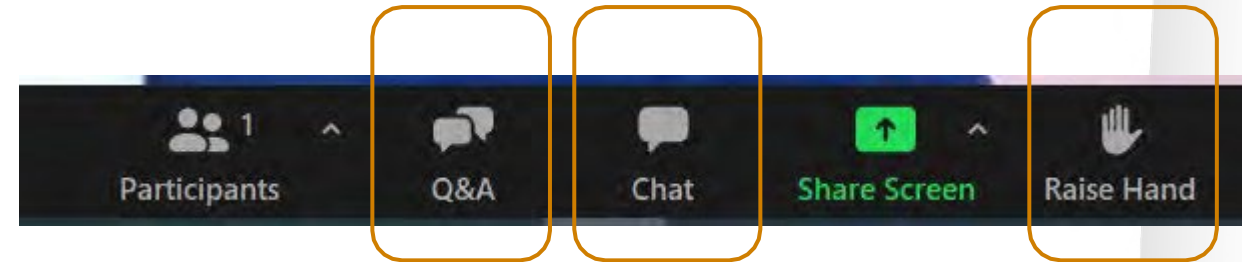
- Click the **Q&A button** to open the window
- Type your response in the text field
- Click **Send**

- **Chat**

- Click the **Chat** button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press **Enter** to send your message

- **Raise Your Hand**

- Click the **Raise Hand** button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the **Lower Hand** button

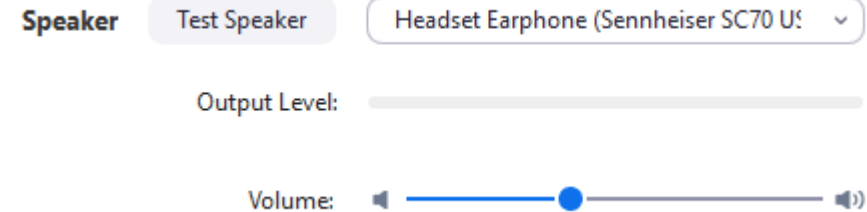
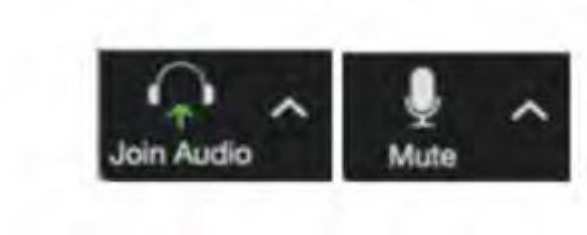
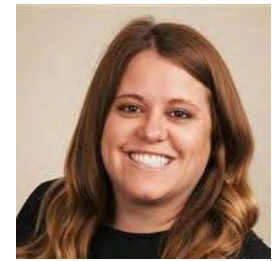


## Optimized Experience

# Audio

- In the meeting controls, click the arrow next to Mute/Unmute in lower left corner
- Click Audio Options - this will open your audio settings
- Click Test Speaker to play a test tone
- If you cannot hear it, select a different speaker from the menu or adjust the Volume

Today's facilitator is Tracy Thompson



# Introductions

Today's Nonprofit Experts



**Chris Stegall**  
Director, Armanino  
Advisory LLC



**Brenda Kahler**  
Director, Armanino  
Advisory LLC



**Turner Jones**  
Sr. Consultant, Armanino  
Advisory LLC

# Today's Agenda

Enhance fundraising and  
donor management



What is Salesforce?



Armanino Client Success Stories



How Armanino and Salesforce Help  
Nonprofits



Demo



How to Engage Armanino



Insight

## Polling Question #1

# What is Salesforce?



## Common Challenges We Hear

- **The Great Resignation** has required nonprofit leaders to think about how to work smarter with the staff that you have while you search for replacements. Technology and outsourcing can help you optimize your workforce to be smarter and faster
- **Inflation and Supply Chain** risks are causing disruption in fundraising, increasing the cost of programs, requiring nonprofits to rethink donor engagement, and maintaining on premises servers and equipment
- **Legacy systems** are traditionally more expensive to maintain ongoing cost for upgrades, inflexible in structure and difficult to change



# How Does Salesforce Help Nonprofits?

## You need to be able to:

- > Manage programs
- > Digitize paper-based processes
- > Automate manual processes
- > Engage constituents across every channel
- > Do more stuff than we can list here



## Salesforce NPSP has standard features to:

- > Track operational metrics in one place whether that is schools built, trees planted, veterans served, blood donated – you name it!
- > Make information available anywhere and at any time
- > Automate workflows like client intake, document generation and outcomes reporting
- > Use out of the box integration with email, social media, websites and more!
- > Endless apps for managing events, campaigns, payment processing, memberships – anything you can think of!



Insight

## Polling Question #2

# Expands its Focus on High-value, Mission-driven Activities



SIERRA HEALTH  
FOUNDATION

INDUSTRY Non-profit Social Services

LOCATION Sacramento, CA



## Challenge

Private philanthropy promoting health, racial equity & justice. They are both a grant seeker and a grant maker using **outdated, legacy systems**.

The systems and processes were insufficient to promote growth and efficiency.



## Solution

We provided an integrated platform and streamlined processes that will help Sierra Health Foundation continue its growth:

- **Salesforce NPSP**
- Outbound Funds
- Experience Cloud
- Online Grant Apps/Surveys
- Grants Management
- ERP integration



## Results

- **Migrated off legacy, disconnected systems**
- 360 view of accounts and a single source of truth
- Elimination of duplicate data entry
- **Cohesion between finance and development teams**
- Portal driven applications and surveys

# Increases Understanding of Impacts on Culture Resulting from Financial Fluency

INDUSTRY Nonprofit Social Services

LOCATION New York, NY



## Challenge

**Organizational growth** caused system limitations too significant to work around. The client needed a consolidated financial management solution that would **eliminate redundant data entry** across systems



## Solution

The solution supports accounting for restrictions and releases, analyzing financial well-being, streamlined budgeting, and seeing financial data in real time:

- **Salesforce NPSP**
- Sage Intacct
- Armanino Consulting, Integration, and Implementation Services



## Results

- Eliminated double data entry for key processes to free up staff time
- **Saves one week of staff time per quarter** creating financial reports for the board
- **Automated the budget process** gave budget leaders access to real-time spending data



## ARMANINO CLIENT STORY

# Transformation of Urban Spaces (and Their Own Technology)

**INDUSTRY** Nonprofit Social Services

**LOCATION** San Francisco, CA



## Challenge

A social enterprise addressing situations where extreme poverty meets homelessness, mental illness, and addiction.

They needed cohesive technology solutions to **engage donors and the communities they serve.**



## Solution

Armanino implemented an **integrated technology stack** for donor management to support mission success:

- Strategy & Transformation
- Technology Assessment
- **Salesforce NPSP**
- Classy
- MailChimp
- Business Outsourcing Services



## Results

- Cohesive reporting and **grant pipeline forecasting**
- Seamless experience for **collecting online & mobile donations**
- Eliminated manual gift entry
- **Single source of truth** for donor data and donor history across development and finance teams

SALESFORCE® APPEXCHANGE

# Extend Salesforce with Best-in-Class Solutions

Salesforce AppExchange is the leading enterprise cloud marketplace. Get nonprofit solutions to fundraise more effectively, streamline the back office and even run advocacy campaigns.



DEMO

## Additional Video Resources

- Donor Cultivation Steps and Donor Experience: [NPSP Opportunity Sales](#)
- Enter Gift in Batches: [NPSP Gift Entry](#)
- Soft Credits: [Multiple Cos. and Soft Credits](#)
- NPSP Reports: [NPSP Reports](#)
- Easy Data Import and Entering Gifts: [NPSP Advanced Mapping](#)

## OUR EXPERTISE

# Why Salesforce + Armanino?

Armanino has more CRM and ERP expertise than any other Partner combined with industry experience in Nonprofit, Technology and Emerging Business Models.

### ESSENTIAL RESULTS

## CRM Excellence & High ROI

- Deep Salesforce and ERP expertise – unmatched in the Salesforce ecosystem
- Highly certified staff that are also CPAs
- Accept and process online donations
- Allow donation forms to be easily integrated with your website
- Directly report transaction data to your Salesforce database

### BEST-OF-BREED SOFTWARE

## Optimize Processes

- Event registration, planning and management tools
- Customizable online forms to collect information
- Peer-to-peer fundraising campaign management
- Targeted action tools for advocacy campaigns
- Digital marketing management and analytics
- eCommerce capabilities

### LOWER COST OF OWNERSHIP

## Exceptional Value

- Pre-built and custom integrations with popular ERPs such as Sage Intacct and Microsoft
- Ability to easily customize page layouts and build flows to meet unique business needs
- Dedicated managed services team to proactively enable continued growth





Insight

## Polling Question #3

# THANK YOU!

## Contact Us:

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# APPENDIX

## OUR CLIENTS

# Helping Nonprofits Fulfill Their Missions

Technology is more critical than ever to a nonprofit's success. In today's world, nonprofits thrive and grow through digital innovation, or stagnate and fizzle out due to the lack of it



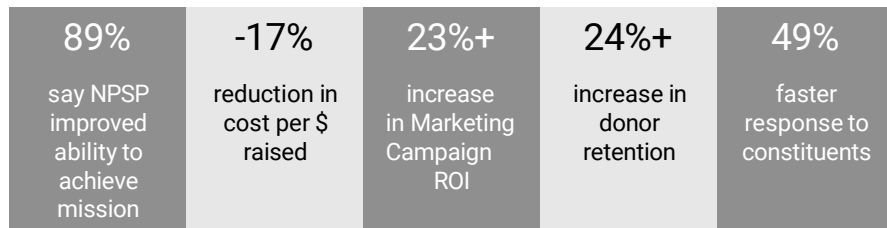
## CRM FOR NONPROFITS

# Salesforce Nonprofit Success Pack (NPSP) QuickStart

## Why NPSP?

- 501c3 organizations receive **10 free enterprise licenses** through the Salesforce Foundation. NPSP is a product developed in partnership with the Salesforce.org community built specifically with the needs of nonprofits in mind
- Manage your contacts and households, donations, organization accounts and affiliations, and grant lifecycles giving you a 360-degree view of your constituents
- Cloud-based and mobile-ready supporting a remote work or volunteer force
- Unites the front and back-office seamlessly to ensure financial processes are fully supported

### The Revolutionary Benefits of Salesforce for Nonprofits



Transform your constituent experience with the world's #1 CRM reimagined to address the needs of nonprofits.

**Value-based Price: \$10,000**

## NPSP QuickStart Scope

### PEOPLE

- Client: Key Stakeholders & Power Users
- Armano: Salesforce Certified Senior Consultant, Project Coordinator & Client Manager

### FIXED SCOPE

- Kick Off Call, Discovery & Salesforce Roadmap (1 hour)
- Configure household, contact and entity setup, with standard duplicate & matching rules
- Donation management – one-time, recurring, in-kind, matching and major gifts, including soft credits
- Grant Management for grant seekers
- Campaigns for events and fundraising
- Custom KPI Reports (up to 8) & Dashboards (up to 1)
- Introduction to Levels and Engagement Plans
- Salesforce Inbox Setup - Outlook 365 (Cloud) or Gmail integration
- Custom Trailmix to aid in end-user adoption with TrailTracker
- 2 60-minute meetings to advise on standard out-of-the-box products, data import, training or extra time on in-scope items
- Go Live 4 weeks from project start with a 4-week lead time
- OPTION: Integration to Sage Intacct ERP

## ARMANINO INTEGRATION PACK

# Salesforce <> Sage Intacct for Nonprofits

### Package Highlights

- Integration Pack created by Armanino that shortens implementation duration, hosted on Tibco-Scribe Integration platform
- Get a single source of the truth with real-time shared visibility across Development, Accounting and Finance
- Eliminate data re-entry and inaccuracies that delay downstream reporting
- Effortlessly integrate donor, campaign, GAU/dimension and donation information between the two systems
- Highly customizable to fit specific client workflows with summary and detail posting options

### Tibco Scribe Hosting - Annual Subscription

- Year-round support
- Error monitoring
- API level support for upgrades of underlying cloud solutions

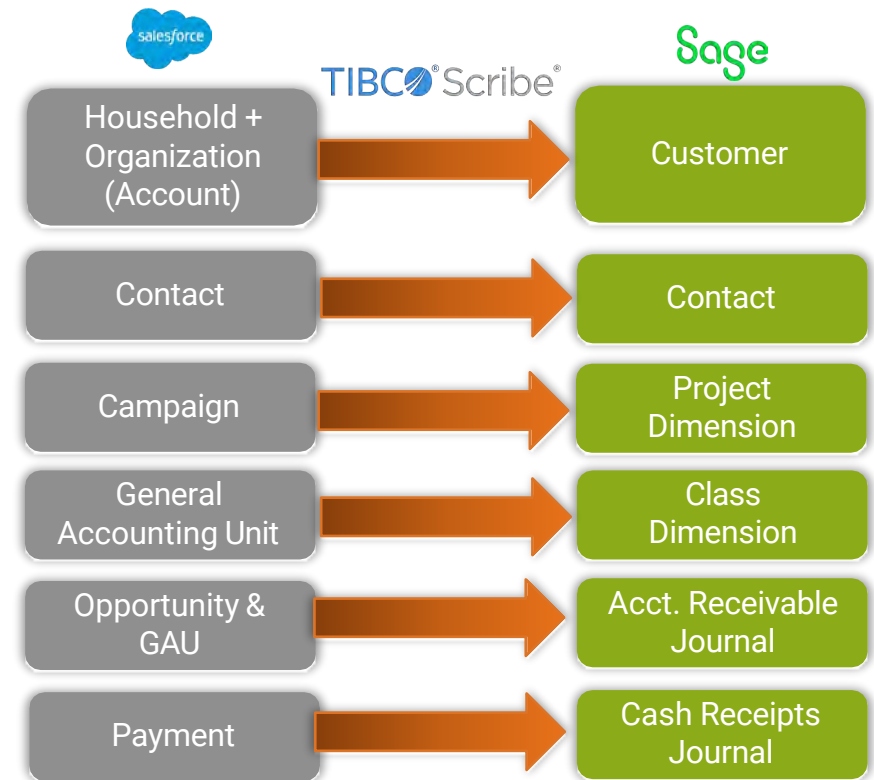
### Pricing & Timeline

- One-time Implementation starting at \$12,500+
- Annual Hosting Subscription starting at \$6,000+
- 4 – 6 week implementation timeline



Armanino named Sage Intacct VAR Partner of the Year 2021. Our Cohesive Team has implemented 500+ integrations of Salesforce to Sage Intacct.

## Typical Nonprofit Integration



## COMPLIMENTARY CLIENT SERVICES

# Salesforce Health Check

Maximize your return on investment and avoid costly mistakes by working with the right Salesforce Partner

## Overview

For clients already using Salesforce, Armanino offers a complimentary Health Check, assessing your return on investment (ROI) and risk review, with a focus on mission-critical items.

- Custom code vs configuration
- Custom field counts, data storage and API limits
- Effective use of process builders and workflows; and a high-level assessment of the components in use by the client.
- Effective use of out-of-the-box functionality
- Deployment status of recent Salesforce functionality
- Available user and feature licenses
- Lightning readiness, if applicable

## What You Can Expect



### 2-3 Hours of User Interviews

Meet with Salesforce subject matter experts for 2-3 hours with the client's Salesforce user group



### Assessment Report

Report detailing the assessment performed and the health of client's Salesforce org, with explanations of critical items that may need attention, including a high-level estimate of the cost to implement the recommended actions

## OUR EXPERTISE

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Armanino has more CRM and ERP expertise than any other Partner combined with industry experience for Nonprofits

### BEST & ONLY

## Pledge-to-Cash Expertise



**Deep Salesforce plus ERP expertise**, unmatched in the Salesforce ecosystem



Cohesive implementation team to optimize and automate the entire Pledge-to-Cash lifecycle



Dedicated managed services team to proactively enable continued growth and help support your mission

### EMPOWER YOUR MISSION

## Grow Relationships



Create donor-centric experiences with digital-first fundraising



Engage lifelong supporters by building relationships



Amplify program impact by measuring programs more effectively



**Achieve a unified view of data** across fundraising, engagement, programs and finance

### MAXIMIZE YOUR IMPACT

## Scale with Nonprofit Cloud



**Scale with purpose-built solutions and best practices** on a flexible, low-code platform



Drive decisions with real-time data using Salesforce reporting and dashboards



Spot fundraising opportunities across your organization by putting your constituents at the center of everything across development, programs and marketing



# Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.