



# **The Landscape of Salesforce for Nonprofits: A Report on the Current Marketplace for Apps**

**February 2014**

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# ACKNOWLEDGEMENTS

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Our thanks to the individuals who contributed to Idealware's research through interviews:

- Kevin Bromer, Salesforce.com Foundation
- Kevin Dillon, Exponent Partners
- Tal Frankfurt, Cloud for Good
- Keith Heller, Heller Consulting
- Rem Hoffman, Exponent Partners
- Sandra Jensen, KELL Partners
- Rob Jordan, Idealist Consulting
- Brian Komar, Salesforce.com Foundation
- Julie Loyd, KELL Partners
- Eric Magnuson, Exponent Partners
- Colleen McCarthy, Exponent Partners
- Judi Sohn, KELL Partners
- Tompkins Spann, KELL Partners
- Thomas Taylor, CRMScience

We'd also like to thank the community of the Power of Us HUB, whose invaluable comments provided much helpful information.

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# FOREWORD

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If you think Salesforce is yet another database company in a crowded market of options, think again. Over the past few years the world of technology has changed dramatically. As a nonprofit, you are forced to “do more with less,” and your technology plays a significant role in that effort. After your staff, your data is the most valuable asset of your organization. This requires careful management and stewardship of all donors, all contacts, all interactions—and increasingly, all program efforts of your organization. To do this well you need more than a database, you need a technology platform that can adapt to your evolving needs.

Therefore, don’t mistake Salesforce as simply a competitor to products like the Raiser’s Edge, DonorPerfect, or eTapestry. Those products are applications designed to meet a specific need. Salesforce is not an application, it is a platform that supports applications. Therefore an apples to apples comparison is not appropriate. This is both a blessing and a curse, because no two implementation of Salesforce will be identical and the success of the product is heavily dependent on the applications installed and configuration choices made.

When discussing Salesforce with nonprofits, I often use the analogy of a house to illustrate their options. Consider the Salesforce Enterprise Edition as the foundation for a very large house. It has a very solid base structure with all of the plumbing, electrical wiring, and basic features you will need; however, it’s not “move in ready” for your nonprofit. Before you can begin living inside this house comfortably, you’ll

need to install some rooms and fill in the gaps that are important to your needs. This house is “alive,” not frozen in time or restricted in any way. It can change to meet your needs allowing you to add rooms, build additional floors, and extend infinitely. The Salesforce.com ecosystem offers numerous options in virtually every category imaginable to meet this need to give you choice and flexibility; consequently, the evaluation effort can be daunting for some nonprofits.

This guide has compiled years of practice and product evaluation from many of the nonprofit industry’s most critical minds into a single source. The value of these resources is literally worth thousands of dollars of paid consulting, and could save you years of trial and error, so by reading this and keeping it handy as a resource you’re already saving your nonprofit money and time—congratulations.

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# INTRODUCTION

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Since its launch in 1999, Salesforce.com—often referred to simply as Salesforce—has become a formidable name in the Customer Relationship Management, or CRM, software sector. The cloud-based vendor has an aggressive product strategy based on acquiring other brands, making the system readily extendable to support other needs, and rapid development, and now counts more than 100,000 companies using the platform. According to statistics provided by Salesforce, an astounding 20,000 of those are nonprofit organizations, which makes the tool one of the most-rapidly adopted nonprofit technologies in recent memory.

How did an upstart vendor focused on sales automation become so prevalent in the nonprofit sector? Part of the answer lies in Salesforce's approach to philanthropy. The Salesforce.com Foundation, founded the same day as the company itself, touts its "1/1/1" model, which refers to committing time, equity, and product to philanthropic endeavors, and relies heavily on its product donation program, called the Power of Us. This effort provides up to 10 licenses of the Enterprise edition product for free to qualifying nonprofit organizations, and a deep discount on licenses above that limit. As the list price of 10 licenses of the Enterprise edition is \$15,000 per year, it's a generous offer for nonprofits.

So what's the catch? As with all major nonprofit technology decisions, the step toward using a powerful system like Salesforce to manage your nonprofit's

processes is a complicated one, and will depend on the needs of your specific organization—in other words, just because it's free and powerful doesn't mean you should necessarily use it. In this report, we take a look at the benefits and drawbacks of using the Salesforce platform to support a nonprofit's needs. We interviewed nine prominent consultants specializing in implementing Salesforce for nonprofits as well as members of the Salesforce.com Foundation about what the platform does well and what you'll need to add to it to help it suit your needs. We'll also take a look at the universe of add-ons to the base Salesforce platform—sometimes called "apps" because of Salesforce's online marketplace, the AppExchange—and explain which might be useful to support your nonprofit's processes.

Our goal for this report is to break down misconceptions about the tool and to collect disparate information in one place to help you make informed decisions. Whether your nonprofit is thinking about adopting Salesforce, has already implemented it, or if hasn't even considered it before now, there's information here for you.



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# USING SALESFORCE AS A NONPROFIT CRM PLATFORM

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What are the considerations you'll need to think about if your organization is weighing the move to Salesforce? First, let's define two terms critical to understanding this system: CRM, and The Cloud.

## What's a CRM?

The acronym CRM—Customer Relationship Management in the for-profit world, Constituent Relationship Management for nonprofits—refers to a holistic approach to an organization's supporters that captures all interactions within one system. CRMs like Salesforce are, by design, very flexible, but they require a fair amount of customization in order to meet specific needs. Like other CRMs, Salesforce comes out of the box without much specific infrastructure built in, so the transition process will require a lot of staff oversight to design and tailor features for your organization. However, once the process is over, you'll have a system that fits your needs without the cost or aggravation of building an entire custom database from scratch. And because custom fields and modules are relatively straightforward to add (and, in the case of Salesforce, readily available on the platform's AppExchange), a good CRM will be able to accommodate new processes implemented by your organization without too many growing pains.

## What's The Cloud?

Salesforce is a cloud-based computing system, which means that unlike traditional, installed software, you access it over the internet rather than installing it on a machine in your office. In fact, Salesforce's logo used to feature the word "Software" in a red circle with a line through it, like a No Smoking sign, to help differentiate it from its peers. Unlike most traditional software, for which costs might include both a site license and licenses for individual users or devices in addition to hardware costs, most cloud systems offer a per user, per month pricing model. This model is

conceptually similar to "renting" your software package—rather than paying a lot of money up front, you pay a monthly fee for what you use. Keep in mind that because cloud-based systems tend to charge based on each individual user, they can in fact be more expensive on a person-by-person basis compared to installed systems.

Similarly, depending on how your organization is structured and who needs access to your CRM, you may find cloud-based constituent management to be less of a hassle. If the people who need to access the database don't all work in the same office, or if employees need to be able to access the database from the field, connecting remotely to an office server can be an annoyance—the same is true if your organization has multiple branches. A cloud-based CRM like Salesforce can be a way to collate all of the branches' shared relationships in one place.

Since cloud-based CRMs are hosted by the vendor, the vendors also manage product updates, security fixes, and server maintenance. Keep in mind that not all client data may be suited for the cloud. If you house particularly sensitive client data—for example, information about domestic violence victims or refugees—and are concerned with how to keep it safe online, it's worth doing due diligence to make sure you're following the right procedures.

## Considerations in Choosing Salesforce as your CRM

Salesforce is by no means the only cloud-based CRM tool being marketed to nonprofits—there are lots of other valid options. But the tool's growing popularity means that finding a consultant familiar with configuring the tool for nonprofits will be fairly straightforward, and the product donation offer from the Salesforce.com Foundation is generous enough to turn many nonprofits' heads. Another benefit? Like other

CRM systems, the platform is designed to integrate with an organization's website, social media presence, and broadcast email. A defining feature of Salesforce is the AppExchange, a bustling online marketplace where developers sell applications designed to sit on top of the platform. Many have been designed especially for nonprofits, and some are offered for free or at a substantial discount to qualifying nonprofits.

But in our consultant interviews, we heard repeatedly that lots of small- to medium-sized nonprofits are using Salesforce simply because it's free, without the proper training or resources to understand this powerful tool or to configure it to be useful. Since the product donation program doesn't come with technical support from the vendor, it can be hard to get your questions answered and problems solved if your organization doesn't have a relationship in place with a consultant. If you don't have technical expertise in-house, tailoring it to do what your organization actually needs it to do can be a difficult or sizable consulting project. This can lead to frustration, confusion, lack of staff buy-in, and often, abandonment of the Salesforce platform.

The Salesforce.com Foundation is starting to rectify this situation by becoming a more hands-on partner to the nonprofits in the Power of Us program. The Power of Us HUB, launched in the summer of 2013, is an officially sanctioned online community for trading tips and resources among program members. The Foundation also has some major developments planned to the managed packages it has provided to turn Salesforce into a nonprofit CRM, and seems to be taking an active role in working with this quickly growing swath of its clients. Other vendors have also stepped into the space to try to turn Salesforce into an out-of-the box constituent management system for nonprofits (we'll profile them in the next section).

Salesforce also has an active developer community that works with the platform upon which Salesforce is built, called Force.com. Other technical terms you might come across include Apex—the proprietary programming language that Force.com uses—and VisualForce, a syntax that lets developers build online user interfaces. The Force.com developer community congregates at Developer Force, a free community-based online portal.

## Hiring a Nonprofit Salesforce Consultant

Unless you're very comfortable with technology, you'll probably have to hire a consultant to set up your Salesforce implementation during the initial customization process—and to be available as needed for ongoing technical support. Many CRM projects fail without the help of a consultant, because even the most technically savvy nonprofit staffers aren't familiar with the specific technology and use cases and different options available to them. This process can be costly, although a few firms offer limited packages designed to be affordable for smaller nonprofits. Once the initial configuration is complete, though, you'll be able to track constituents in a number of different ways—not just siloed into separate donor member, and volunteer areas—and see the different ways they interact with your organization. You'll also be able to track your organization's communications with its constituents if you use Salesforce to send emails and record such other interactions as meetings and phone calls. An experienced consultant can even build features into Salesforce that go beyond basic constituent tracking, like member dues renewal and sophisticated event workflows, for example.

A quick word of warning about choosing a consultant to help you configure Salesforce: Some operate on a “pay-to-play” model with app vendors, meaning they accept money from vendors in order to make the app they sell their preferred donation processing app, for example. These consultants might be quite familiar with how to implement and configure the apps that pay them, so if this arrangement doesn't faze you, it may actually be a more straightforward process to get up and running. It's also a pretty common structure, so it may be hard to avoid, and the fees involved aren't usually very high. Some consultants are app “agnostic”—they won't take money from app vendors. It's worth asking consultants if they have preferred apps for different processes, whether they receive fees to recommend them, and to research those tools to make sure they'll map well to your nonprofit's needs.

# CHOOSING THE RIGHT VERSION OF SALESFORCE

An Opportunity viewed within Salesforce.

The screenshot displays the Salesforce user interface. At the top, there's a navigation bar with tabs for Home, Files, Leads, Contacts, Organizations, Opportunities (selected), Reports, Dashboards, Contact Merge, Relevant Software, Sessions, and a plus icon. Below the navigation bar is a search bar and a 'Customize Page | Edit Layout' link. The main content area shows the 'Opportunity Detail' for 'ZZ Test Opp'. It includes a 'Show Feed' button and a list of related items: Deliverables/Articles (0), Invoices (0), Products (0), Open Activities (0), Activity History (0), Notes & Attachments (0), Contact Roles (0), and Stage History (7). The 'Opportunity Detail' section has 'Edit', 'Delete', and 'Clone' buttons. Below this is the 'Commissioned Work' section, which contains a table with fields: Opportunity Owner (Admin Admin [Change]), Amount (\$1.00), Opportunity Name (ZZ Test Opp), Close Date (11/18/2013), Organization Name (ZZZ Test Org 1), Stage (Sold), Expected Revenue (\$0.90), Probability (%) (90%), Primary Campaign Source, Work Start Date (11/1/2013), Invoice(s) Created (0), and Work End Date (11/30/2013). The 'System Information' section includes fields for Created By (Admin Admin, 11/14/2013 11:24 AM), Description (This is a test opportunity), Revenue Type, and Payment Model. It also has 'Edit', 'Delete', and 'Clone' buttons.

Nonprofits looking to configure Salesforce into a non-profit constituent management solution without doing the entire configuration on their own, or with a consultant, have a number of options at various price points. You can choose from two configurations provided by the Salesforce.com Foundation itself, more out-of-the-box solutions that have been tailored to nonprofit needs by third-party vendors, or even a few constituent management tools directed at specific kinds of nonprofits, like synagogues or performing arts organizations. Let's walk through these options one by one.

## Options Provided By Salesforce

There are two free options provided for nonprofits by the Salesforce.com Foundation itself, which provide entry points into the Salesforce world. These solutions offer lots of power, but will likely require significant customization to meet your needs.

**The Salesforce Enterprise Edition, from Salesforce.com**

[www.salesforce.com/sales-cloud/overview](http://www.salesforce.com/sales-cloud/overview)

The most “vanilla” edition of Salesforce available to nonprofits (free for up to 10 user licenses) is called the Sales Cloud Enterprise Edition. This is a fairly feature-rich version of Salesforce designed for the needs of complicated businesses and sales operations.

At its core, Salesforce is a contact management database—you access it through a browser using a secure login and password, or via an app on a mobile device. Standard clusters of functionality within the system are called Objects, and those include the following: “Contacts,” which tracks individuals with whom your organization has a business relationship; “Reports,” which allows you to flexibly create criteria-based reports and visual dashboards; and “Accounts,” which is meant to track organizations and group contacts together.

“Contacts” includes standard fields like First Name, Last Name, and Email, and you can add new tabs and fields as well as creating custom objects, allowing you to store data Salesforce has no native place to store. In Salesforce, before configuring the system to meet

the needs of nonprofits, there are also sales-specific terms, like “Leads” for new potential customers and “Opportunities” for tracking donations or prospective donations. Other defining aspects of Salesforce include Chatter, which is the in-platform social networking, collaboration, and communications tool, and a universal search function which lets you look across all fields in the system.

After the 10 free user licenses, nonprofits can purchase additional licenses for \$300 per user, per year, which represents an 80 percent discount off standard pricing.

### **Nonprofit Starter Pack (NPSP), from Salesforce.com Foundation**

[www.salesforcefoundation.org/nonprofitstarterpack](http://www.salesforcefoundation.org/nonprofitstarterpack)

As an alternative to the business-focused Sales Cloud Enterprise Edition, the Salesforce.com Foundation also offers The Nonprofit Starter Pack—sometimes abbreviated as the NPSP—free for up to 10 user licenses. The NPSP is a set of custom fields and objects, reports, workflow, page layouts, Apex code, and VisualForce pages designed by the Salesforce.com Foundation specifically to accommodate common nonprofit constituent management functions, primarily fundraising. As the name implies, the NPSP provides a baseline solution for tracking contacts and organizations, households, affiliations (relationships between individuals and businesses and among individuals), pledges and recurring donations, and Batch Data Entry, though Batch Data Entry is sometimes excluded from the NPSP. While the NPSP lacks many features important to nonprofits, it’s been purposely designed to let organizations choose from a growing menu of options available from the AppExchange and partner community to customize their Salesforce experience.

Although some of our consultants said that the Nonprofit Starter Pack was too basic to facilitate an enterprise-level experience—they felt it has the reputation of being for beginners only—many others disagreed, and considered it a good starting place for organizations of diverse sizes and needs. Since no two nonprofits will have the same set of requirements, the thinking goes, the Nonprofit Starter Pack provides an entry point that can be easily customized to match the specific needs of the organization, or supplemented by third-party applications.

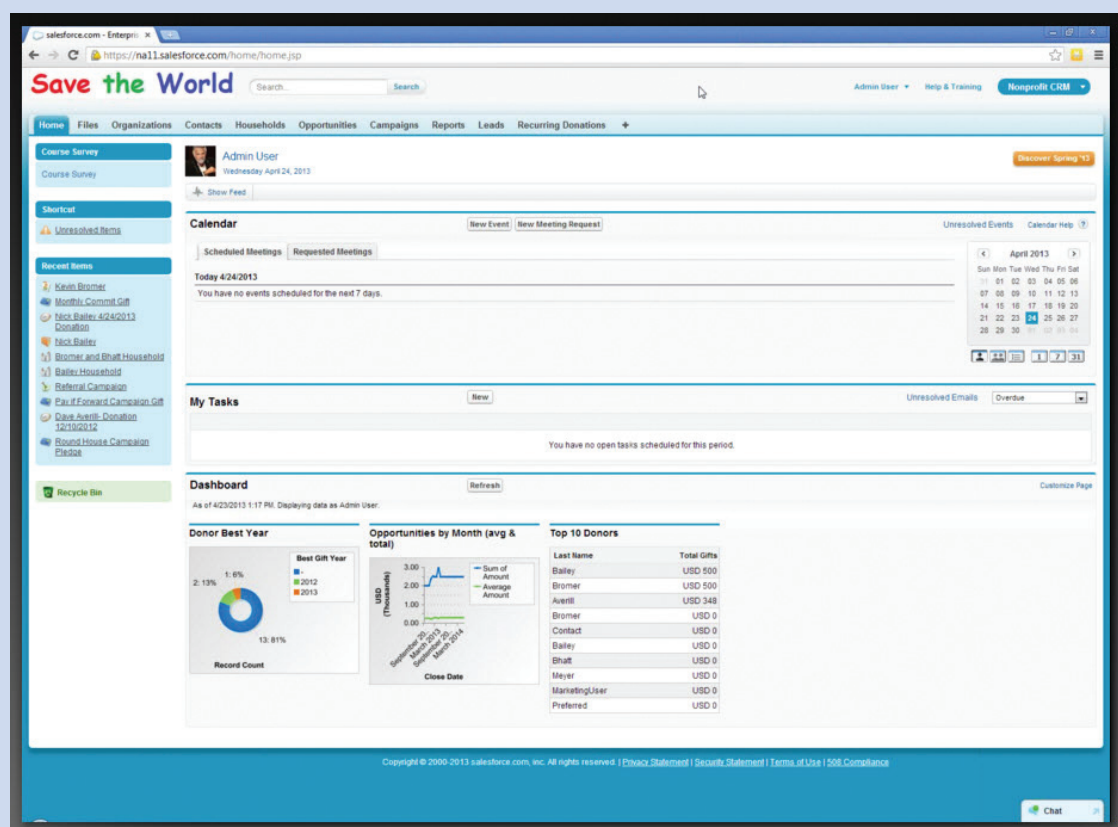
Since Salesforce was originally designed to be a business-to-business relationship management tool, the core data model requires some adjustment to work for nonprofits focused on individual relationships and households. For Contacts and Organizations, nonprofits can choose between the “bucket model” and the “one-to-one Contact to Account model” (usually abbreviated as the “one-to-one model”). This is where some of the growing pains of making Salesforce into a nonprofit CRM become evident. In the bucket model, all Contacts not affiliated with an organization get connected to one Account; in the one-to-one model, Contacts not affiliated with an organization get their own Account. Because this approach of tracking people first and organizations second flips the general data model of Salesforce, this can make extending the system with outside apps difficult. However, the Salesforce.com Foundation has announced changes to this architecture coming soon that may mitigate this problem. The Households object, which is an extension on the Contacts and Organizations managed package, may not be a great fit for all nonprofits, either.

The Nonprofit Starter Pack has well-known gaps and weaknesses. For one, it’s geared toward supporting a nonprofit’s fundraising needs rather than program management or back office. Nor does it include functionality for volunteers, events, email marketing, online forms, or payment processing, among other common needs, and there’s no means of doing mail merges out of the box. And integrating with a bookkeeping or financial solution is not possible out of the box. Until recently, the Salesforce.com Foundation provided little in the way of resources or training on the tool, although this is changing, and many consultants who configure Salesforce will use at least part of the Nonprofit Starter Pack as a jumping off point for their nonprofit implementations.

Many consulting firms have developed their own applications to fill in many of the gaps of the Nonprofit Starter Pack, which can be another advantage of partnering with a consulting firm to implement Salesforce for your needs. The Salesforce.com Foundation is also planning a major release in early 2014 that will offer similar features.



## The Salesforce Nonprofit Starter Pack.



## General Packages From Other Vendors

For nonprofits looking for a more out-of-the-box solution, and a vendor to provide customer support and training, there are some viable nonprofit CRM alternatives built on top of the Salesforce platform. For these solutions, you'd negotiate a contract directly with the vendor for their product—and whether that includes helping you manage the external apps you add varies among vendors. Our consultants felt that these solutions were slightly more difficult to work with than the NPSP or plain vanilla Salesforce—one said that adding more code to the solution created both additional opportunity for failure and a more difficult integration.

Most of these solutions are also quite focused on supporting a nonprofit's fundraising needs. The popular Salesforce-based Common Ground, retired by Blackbaud after its parent company Convio was acquired, serves as a high-profile reminder that the longevity of these tools is never a sure thing.

## Affinaquest

[affinaquest.com](http://affinaquest.com)

Developed by a member of the team that designed the system that later became Sage Fundraising 50, Affinaquest focuses on making the Salesforce infrastructure serve traditional, complex fundraising needs. The philosophy behind Affinaquest is that an organization can supplement the software's strong donor management capabilities by paying for other specialized tools on the Salesforce AppExchange, such as Conga Merge for mail merges and Soapbox Engage for online donations and event management, although the vendor is beginning to add more features and integrations directly to Affinaquest. Affinaquest also has an integration with 2Dialog, a vendor that provides sophisticated online marketing services. The user interface is standard Salesforce, but Affinaquest's gift and pledge functionality are custom objects rather than being built upon the Opportunities module, as with most other donor management systems. Opportunities are kept for major gift solicitation—this can prove problematic if your organization attempts to integrate a non-Affinaquest solution for gift processing (e.g. e-commerce, peer-to-peer fundraising, events). The

system has very sophisticated gift, pledge, campaign management, batch entry, and querying abilities, and has been built on donor management best practices. Broadcast email and accounting integration are absent from the base product, so a nonprofit would need to use external services, such as 2Dialog, for those functions.

As of late 2013, when we collected this pricing data, Affinaquest costs \$3,600 per year for nonprofits with fewer than 20,000 donor records. Unlimited users and support are included.

### Causeview from Breakeven

[www.causeview.com/products/causeview](http://www.causeview.com/products/causeview)

Causeview is a donor management system from Breakeven Inc., a Canadian software company that provides cloud solutions for nonprofit organizations. Rather than use Salesforce's built-in Opportunities module to track and manage donations like the Nonprofit Starter Pack and roundCause, Causeview reserves the use of Opportunities to manage major gift and grant prospects through the opportunity pipeline. To handle financial transactions, Causeview has built a custom Transactions object, which handles one-off gifts, pledges, recurring donations, event registrations, and purchases. Causeview also has a helpful batch entry mode and includes some nice functionality around major giving; it also provides moves management functionality to help usher donors to higher levels of giving. Householding is robust, and searches against existing individuals before adding new household members to minimize duplicates in the system. Causeview provides ActionPages for online donations which are PCI-compliant, and provides a wizard-based tool for creating new donation pages for non-technical staff. You can configure the system to automatically send a thank-you letter from one of the unlimited, flexible templates after a one-off donation. You still need to use external apps for mail merging and broadcast email, however.

Querying out of the box uses standard Salesforce functionality, and for now there's no built-in integration with an accounting system. Causeview comes loaded with standard reports and dashboards to make a fundraiser's life easier, and also has a robust new volunteer and event management module. The new event module

includes a smartphone app that can support mobile event check-in and registration. Another strength of Causeview is the portal approach—Breakeven has partnered with another vendor, Magentrix, to offer a constituent portal solution for managing all aspects of an individual's engagement with the organization.

As of late 2013, when we collected this pricing data, Causeview required a minimum of three user licenses, which cost \$1,440 per year (\$480 per user, per year), with additional fees for each of the available web portals (for donors, events, and volunteers), and additional transaction fees if an organization uses its payment processing (typically done via Optimal Payments). Additional users are \$480 each per year, and enhanced support can cost up to an additional \$4,500.

### MemberNation and DonorNation from Fonteva

[www.fonteva.com/products/membarnation](http://www.fonteva.com/products/membarnation)  
[www.fonteva.com/products/donornation](http://www.fonteva.com/products/donornation)

Established in early 2010, Fonteva is a relatively new vendor in the constituent database marketplace that offers two solutions built on the Salesforce CRM platform: MemberNation, designed for associations with dues-paying members; and DonorNation, designed for nonprofits to use as a fundraising database. The products share functionality, and the vendor can combine features from each during implementation. The founders of Fonteva have deep experience developing Salesforce.com solutions, and come from an accounting background, so their financial tracking features are very robust. There's an online, front-facing portal to help constituents manage their own accounts. MemberNation has gained some traction with trade associations, and it's designed to support those processes rather than that of an individual member-focused nonprofit. Fonteva products are designed for membership-focused organizations, with appropriate key strengths—for example, if your organization would like to have an online directory of members accessible within a searchable, authenticated portal, MemberNation provides this out of the box. The member management capabilities of MemberNation are unrivaled when compared to other fundraising-focused solutions built on Salesforce.com. Additionally, the transaction model of this product will support a wide variety of financial transactions. As with most of these other turnkey

solutions, broadcast email and mail merge features must come from an AppExchange partner.

Annual fees range between \$10,020 and \$90,000 depending on the size of your list.

### Luminate CRM from Blackbaud

[www.convio.com/our-products/luminate](http://www.convio.com/our-products/luminate)

Luminate CRM is an upgraded version of the Common Ground platform being retired by Blackbaud, and integrates tightly with the Luminate Online Marketing suite of products. Luminate CRM uses the Opportunity object for tracking donations and uses custom objects for tracking pledge and recurring gift commitments. The batch gift entry tool within Luminate CRM is one of the most sophisticated among any fundraising-focused product on the market. The integrated Analytics services pulls information from a dedicated data warehouse to provide sophisticated analysis of your data from both Luminate CRM and Luminate Online. For a nonprofit using or considering purchasing Luminate Online, the Luminate CRM is perhaps the obvious choice considering the sophisticated real-time integration between the two systems. However, Luminate CRM by itself—without Luminate Online—could be challenging to use, and may not provide as much value.

Luminate is priced based on list size, and for both the CRM and Online Marketing facets of the product, the price ranges between about \$29,940 and \$83,940 per year.

### roundCause from roundCorner

[www.roundcorner.com/roundcause](http://www.roundcorner.com/roundcause)

Donation management is strong in roundCause. The developers have built new functionality in the standard “Opportunity” object in Salesforce to manage fundraising, and have renamed it “Giving.” Initially built for public media organizations, the membership management features in roundCause are extensive and can support complex membership needs. The product is also excellent in terms of prospecting and moves management to help you find donors and move them to higher levels of support. To process payments and accept online donations, roundCause offers its own solution and also allows the organization to select its payment processing from several options like

Sage. Additionally, roundCause has a sophisticated batch gift entry feature-set that includes the ability to upload a file of donations to be imported. It also provides sophisticated event management, including ticketing, through functionality specifically built into roundCause and a custom integration with StayClassy that provides peer-to-peer fundraising capabilities and additional options for fundraising pages and gala-style events. The vendor has also developed some standard reports and sophisticated data import-and-warehousing tools to upload external information into the database. (In 2013, roundCorner received a significant investment from Salesforce.com to accelerate its development—a few of our consultants hinted that a more formal partnership between the companies was likely forthcoming.)

roundCause costs \$900 per user, per year, or alternatively, organizations can pay an annual fee of around \$44,000 for roundCause and roundData subscriptions with no user limit; pricing can vary by nonprofit size, number of active donors, and other factors.

## Also consider:

### 501Launchpad from 501Partners

[501Partners.com](http://501Partners.com)

501Partners is a nonprofit consulting firm specializing in Salesforce. They have developed a “comprehensive improvement” of the Nonprofit Starter Pack, which they say offers the capability to manage donors, grants, and campaigns through the platform. 501Partners also provides training and support.

We were unable to find pricing information.

### Linvio Non-Profit Toolkit

[www.linvio.com/non\\_profit\\_toolkit.php](http://www.linvio.com/non_profit_toolkit.php)

Linvio, the company behind the PaymentConnect Solution profiled in the Donation Transaction Processing section of this report, has partnered with the Salesforce Foundation to offer a solution that offers support for donation management, memberships, online ticket sales, and landing pages. The toolkit also includes the ability to manage members and volunteers, which isn’t present in the Nonprofit Starter Pack.

We were unable to find pricing information.

## Niche Solutions

The solutions above are meant to meet the general needs of most nonprofits. Organizations with more specialized requirements may be interested in some of the tools below.

### FoundationConnect by NPower

[www.npower.org/Professional-Services/Foundation-Connect.aspx](http://www.npower.org/Professional-Services/Foundation-Connect.aspx)

FoundationConnect is a grants management system that capitalizes on Salesforce's strong relationship-management features to provide robust tracking for organizations, contacts, and grants, including the ability to track and report on grantees with multiple related business units. Strong support for dashboards, task lists, and role-based views provides a feature-rich experience for grants managers while allowing program officers and management to see only the information relevant to them. Grantees and external reviewers log in through a separate-but-tightly integrated portal application. Users will want to visit the Salesforce AppExchange to add Conga Composer or LOOP Document Services for mail-merge and template capability. Email sent from FoundationConnect is automatically logged and routed through Salesforce email servers, which shields organizations from the risk of being blacklisted for mass mailing, but it limits the number of emails you can send per day—some organizations might want to add a broadcast email tool, as well. A free connector lets users log email sent from Outlook and synchronizes their Outlook contacts with the system.

The initial license cost for FoundationConnect ranges from \$25,000 for small foundations to \$40,000 for larger foundations, with maintenance and support ranging from about \$7,200 to \$14,400 per year. Users also need to factor in the cost of Salesforce licenses if they need more than 10.

### PatronManager from PatronTechnology

[patrontechnology.com](http://patrontechnology.com)

Arts-focused organizations that manage events and ticket sales in addition to constituent management might be well-served by a look at Patron Technology's PatronManager. PatronManager transforms the Salesforce Nonprofit Starter Pack into a basic donor

management system with powerful assigned seating ticketing and event management. A real-time website module combined with staff sales tools allows both online and box office sales. Patron Technology also adds a proprietary PatronMail broadcast emailing tool to the base Salesforce system. This system is not as strong as others when it comes to pledges or other fundraising features. While adding a pledge is similar to adding a donation, you'll need to set up alerts through the workflow in order to notify users when a donor has an outstanding pledge, and applying a donation to a pledge is a slightly unintuitive process of changing the stage of an expected payment from "Pledged" to "Posted." While it is not feasible to enter multiple gifts at once yourself, Patron Technology will import multiple gifts for you if you have more than you can reasonably enter one at a time.

For organizations that do not sell tickets, PatronManager has an annual fee starting at \$2,500. For organizations that do sell tickets, Patron Technology instead draws revenue from per-ticket fees on credit card orders, which range between \$1 and \$4 per ticket, paid by patrons. Patron Technology asks that ticketing clients meet an annual minimum of 2,500 per-ticket fees collected, and that clients who do not meet this minimum pay the difference.

### Cloud for Synagogues from Cloud for Good [cloud4synagogues.com](http://cloud4synagogues.com)

Cloud for Synagogues is a synagogue management system from Cloud for Good, a consulting firm that specializes in implementing Salesforce with nonprofit clients. Cloud for Synagogues is very capable at handling family units and member tracking. It's also got the capacity to manage Yahrzeits (the anniversary of a loved one's death) and helpful in running events. Cloud for Good also has an accounting module and a donation acknowledgement feature as part of the basic package. The system offers an outward-facing web portal to allow synagogue members to edit their own demographic data and settle their accounts at an additional cost.

Cloud for Synagogues starts at \$1,800 a year for the most basic package of up to five synagogue staff users, with additional costs for staffers beyond that. Data migration is also available from about \$3,000 and up, and onsite training is an option for \$150 an hour.



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# THE LANDSCAPE OF APPS AND ADD-ONS

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The Salesforce AppExchange ([appexchange.salesforce.com](http://appexchange.salesforce.com)) is an online marketplace of more than 2,000 additions, both free and paid, and can be an extremely useful place to find tools to complement your Salesforce implementation. These are usually offered on a monthly subscription basis, and the cost can add up, but these apps can also add substantial capabilities to the system. The site can be overwhelming, though. It's worth understanding a few things about it before you explore. There's a cluster of apps under Industry Solutions for Nonprofits [[appexchange.salesforce.com/industry/nonprofits](http://appexchange.salesforce.com/industry/nonprofits)], but it's not totally comprehensive, as some nonprofit needs are indistinguishable from the needs of for-profit companies (such as email marketing and data management).

Sometimes, a vendor will only make a tool available as a private listing, which means it's unlisted on the AppExchange and can be discovered only through other channels. We've tried to note when tools are private listings. Note that you might also run across the term "managed package," which refers to a way for developers to package and sell licenses for the app, manage upgrades, and prevent their code from being modified. The technicalities of a managed package are mostly meaningful only to developers.

Choosing applications that work with your instance of Salesforce is not as easy as you might imagine. Most of the public applications are configured to work with the native data model of Salesforce. If you're using one of the products that has deviated from the native model—like the Nonprofit Starter Pack—some apps may not work. The best example of this is with duplicate management applications. Most assume you're using the "Vanilla" for-profit flavor of Salesforce and will have problems managing duplicates within households. Many of our consultants also pointed out that implementing lots of apps can clutter up an implementation and make it more difficult to configure. Just because an app is available doesn't mean you need it, even if it's free—the excess clutter it adds to your Salesforce instance may not be worth it. Don't install apps from unfamiliar vendors unless you've thoroughly tested them and conducted references, as the long-term ramifications and technical complications could significantly increase the cost.

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# EMAIL SERVICE PROVIDERS

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Although Salesforce allows you to send up to 1,000 emails per day through its free, built-in email capability, for sophisticated campaigns and detailed statistics, you'll need a broadcast email tool (often referred to as an Email Service Provider or ESP). Our experts described this as one of the most-straightforward integrations to perform with Salesforce, including the Nonprofit Starter Pack—and there are plenty of options. Consultants can also build integrations for you. Since ExactTarget was acquired by Salesforce last year, it may soon be easiest to integrate into the most tightly integrated and effective for sophisticated email marketing Platform.

Email products are generally classified in two categories: email marketing and marketing automation. The products that deliver marketing automation (sometimes called drip marketing) allow you to construct a series of messages, landing pages, and automation events that are constantly querying Salesforce, sending automated messages and updated records with insightful information. Once configured and enabled, these products will run automatically and move contacts through a pre-determined engagement pathway. Effective use of these products requires significant time and strategy, but the benefits are worth the effort if you have the resources and budget. Tools in this category include ExactTarget, Pardot, Silverpop, Marketo, HubSpot, Genius, and ActOn.

Email marketing tools are often referred to as “blast” email products. For these tools, the user determines an audience and sends a bulk message to contacts within Salesforce. Tools in this category include Constant Contact, MailChimp, Vertical Response, MyEmma, and Soapbox Mailer.

## Vertical Response

[www.verticalresponse.com](http://www.verticalresponse.com)

Many smaller nonprofits have chosen to use Vertical Response in part because of the vendor's product donation program: all 501(c)(3) organizations are allowed to send up to 10,000 emails a month, with a 15 percent discount on costs above that limit, as well. The consultants we interviewed described Vertical Response's integration with Salesforce as “relatively good,” and described the tool as a great starting point for smaller organizations, but its limitations might frustrate some. You can only maintain five different lists at a time (though this can be circumvented somewhat by using Campaigns), and each account can only be associated with one Salesforce user, which means that email statistics can only be seen by the user that created the blast and only that user can send messages. You can choose between the full version of the app, and another, simpler version that uses tabs instead of custom objects.

Vertical Response is free for qualifying nonprofits for up to 10,000 emails per month. Above that, you pay between .012 and .006 cents per email, depending on how many are in the blast.

## iContact for Salesforce

[www.icontact.com](http://www.icontact.com)

iContact's email-building wizard is not integrated into the Salesforce platform by default. You need to pay extra for the connector, which our consultants described as working “decently,” and integrates with the Campaigns object. A key strength of iContact is the ability for a nonprofit with multiple authors to manage multiple lists and subscriptions. iContact leverages the security permissions of Salesforce to allow multiple authors to manage their own lists and subscriptions all within a single Salesforce instance. One big drawback: individual tracking results are

stored in an “iContact Message Statistic” custom object, one of seven that the package contains. The tool itself was described as user-friendly.

iContact offers a 20 percent discount to nonprofits, which means plans range between \$96 per year for a very small list of no more than 250 all the way up to \$1,050 for 15,000 subscribers, with a 15 percent discount for paying annually in a lump sum. iContact also offers fully free product donations to organizations based in North Carolina.

### Constant Contact for Salesforce

[www.constantcontact.com](http://www.constantcontact.com)

A well-known brand in the email marketing space, especially for those with lists of around 10,000 or fewer, Constant Contact provides a free plug-in to connect with Salesforce on the AppExchange. This integration is not recommended by the consultants we interviewed, and the tool gets poor reviews both on the Constant Contact MarketPlace and on the AppExchange, where it’s only available as a private listing. A couple pieces of feedback posted by users include the following complaints: You can’t run reports on your Constant Contact information from within Salesforce, and you must manually import lists. Cazoomi SyncApps also offers a Constant Contact connector that will synchronize contacts and key email statistics—several consultants we spoke with mentioned the Cazoomi product as the best option for an organization that wants to use Constant Contact. (We discuss Cazoomi as a general middleware solution in our Data Synchronizing and Middleware Apps section.)

Free for the basic Connector, Constant Contact costs between \$132 and \$276 per year with the nonprofit discount, depending on your list size. (Cazoomi SyncApps costs \$300 per year for the version with the Constant Contact connector.)

### MailChimp

[mailchimp.com](http://mailchimp.com)

MailChimp is another popular product that’s been praised for its innovative and user-friendly interface. The vendor recently rolled out a new, free MailChimp application for integrating with Salesforce. It’s been

described as easy to install and configure, with notable limitations in terms of list segmentation. Another option for nonprofits that like MailChimp is to instead use the connector provided by Cazoomi SyncApps, which works to sync data across a variety of different platforms. (We discuss Cazoomi as a general middleware solution in our Data Synchronizing and Middleware Apps section.) This makes for a rather complex setup process, but could be worth it for devotees of both Salesforce and MailChimp. Like Vertical Response, MailChimp offers a number of free emails to those with less substantial email marketing needs—to all organizations, not just to nonprofits.

MailChimp is free if you send fewer than 12,000 emails per month to 2,000 subscribers. Above this limit, the vendor offers a 15 percent discount on its rate to nonprofits, which means that it costs between \$102 per year for lists of fewer than 500 subscribers and \$5,000 and up annually for lists in the six figures. Cazoomi offers nonprofits a 50 percent discount on its Professional Email Marketing plan, which includes the Salesforce connector and costs \$300 per year with the nonprofit price break.

### Soapbox Mailer for Salesforce

[www.soapboxmailer.com](http://www.soapboxmailer.com)

Soapbox Mailer is a fairly new product designed to complement to the Soapbox Engage suite of products by PICnet, marketed directly to nonprofits. It’s unique in that it’s the only native Salesforce app built specifically for nonprofit organizations that allows in-platform broadcast email creation and management, so you don’t need to sync data. Emails are sent through Amazon Web Services. It’s also designed to integrate with the Nonprofit Starter Pack. Soapbox Mailer has been described as easy to use and has been getting great reviews on the AppExchange, with special compliments paid to the vendor’s customer service. There are some limitations around building email and direct mail templates, as the nonprofit must include the HTML code along with its content for each message to render an attractive email.

Soapbox Mailer is priced based on budget size, and ranges between \$228 and \$948 annually, as well as 10 cents per every 1,000 emails sent.

## Emma for Salesforce

[myemma.com](http://myemma.com)

We didn't hear much about Emma in our consultant interviews, but the capabilities seem promising, the design is attractive, and the vendor has a few high-profile nonprofit clients. Emma has a new Salesforce app that's just out of beta—you still need to set up a sync process to make sure the data in both systems is up-to-date. Emma's delivery rate is an industry-leading 99.2 percent, and it has some nice features like native A/B subject line testing and a focus on mobile templates.

The app for Salesforce itself is free. Emma offers a 20 percent discount to nonprofit organizations, which means it will cost between \$288 and \$4,032 per year for unlimited emails, depending on your list size.

## Predictive Response xPress

[www.predictiveresponse.com](http://www.predictiveresponse.com)

For mid-sized campaigns that can't be easily managed by the lower-cost solutions above, organizations might want to consider Predictive Response. It's a native Salesforce application that specializes in supporting campaigns with multiple stakeholders, or organizations that have a headquarters-and-field-office model. It's definitely a more sophisticated solution, so it's not quite as user-friendly, but it lets you set up drip campaigns that allow you to send a series of messages to your constituents once an action is taken, among other features.

Predictive Response advertises a 30 percent discount to nonprofits in the Salesforce Foundation's Power of Us program, which means it costs between about \$800 and \$6,000 per year.

## ExactTarget

[www.exacttarget.com](http://www.exacttarget.com)

ExactTarget's high-profile acquisition by Salesforce in 2013 means that a lot more investment will be put into refining and developing the product, and that the integration between the platforms will continue to improve. The tool has lots of sophisticated features, like drip campaigns, non-global unsubscribe, native A/B testing, and very robust customer support.

ExactTarget starts at \$1,200 per year and climbs steeply from there based on your size and needs. The vendor offers a nonprofit discount, but do not publish the details—one of our consultants reported it to be 50 percent.

## Pardot

[www.pardot.com](http://www.pardot.com)

Initially acquired by ExactTarget, Pardot is now a Salesforce product. It's meant to do marketing automation, not just mass email, and has built-in social media marketing features as well. The tool is very powerful, but requires a fairly steep learning curve. Pardot is not likely a solution for most nonprofits, as its target client is focused on business to business campaigns, whereas ExactTarget's focus is on constituent and consumer campaigns—a more-appropriate audience for nonprofits seeking constituent engagement.

You pay a monthly fee as well as paying for a "block" of contacts in Pardot, which means it starts \$12,000 per year for 30,000 contacts and becomes much more expensive from there. The vendor advertises a nonprofit discount—one of our consultants reported it to be 50 percent.

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# DATA MANAGEMENT

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Tools to help keep your data clean and usable in Salesforce abound, and this is an area where tools designed for the needs of for-profits may be just as applicable to your organization's particular implementation. Data import tools are of particular interest, as the built-in Salesforce wizards are deliberately basic. As one of our consultants pointed out, there's no silver bullet in terms of data management apps, and specific recommendations will depend on the critical needs of the nonprofit. And there's no substitution for good and consistent practices around data entry at your organization. Here are some apps that might help you make the most of the data you've got. Many of them are free for nonprofits, too.

## Export and Import Tools

Salesforce does have the ability to import and export data out of the box, but there are limitations around the number of records you can add and how often you can do exports. Many organizations choose to use third-party tools to enhance these standard capabilities. Some of these tools go beyond just helping with importing and exporting and are designed to perform ETL processes. ETL stands for Extract, Transform, and Load, and refers to the cycle of extracting data from external sources, transforming it to map to the fields and logic of the system to which it's going to be imported, and then actually loading the data into the target system. These tools can be used to mass update, delete, import and export your data. Some include special connectors for integration with common third-party products, and some products include de-duplication functionality in addition to ETL features.

### Jitterbit Data Loader for Salesforce

[www.jitterbit.com](http://www.jitterbit.com)

Jitterbit offers a few different data management tools. Its data loader is slightly less robust than its peers, but that's specially designed to help you import data into Salesforce. It helps you automatically map fields, and there are wizards that guide you through many processes. It's an installed system that lives on your desktop—our consultants described it as especially strong in terms of transforming data, and it's also free for everyone, not just nonprofits. Jitterbit also provides other products at a cost that will help you integrate with third-party systems.

Jitterbit is free.

### Data Loader for Salesforce and Dataloader.io by MuleSoft

[dataloader.io](http://dataloader.io)

Dataloader.io is a cloud-based, Salesforce-integrated version of Apex Data Loader. It is easy to use and provides basic features to help you export, import, and delete data from Salesforce. It doesn't clean and transform data very well, according to our experts, but it helps you schedule automatic imports and exports and can accept data from multiple file sources. Since there is nothing to install or configure, and the most basic version of the tool is free, it's worth checking out if you're looking for a tool just to import and don't need complex transformations or want to hassle with installing or downloading another application.

Data Loader is free for the basic version, and \$3,600 per year for the much more robust Pro version.



## DemandTools by CRMfusion

[www.crmfusion.com/demandtools](http://www.crmfusion.com/demandtools)

CRMfusion offers the ETL tool DemandTools free to nonprofits through product donations, but does not include technical support; however, the vendor offers regular public training sessions for its nonprofit clients via webinar on the tool. It's a high-powered system that's installed on your desktop. Data management can be fairly technical, which is important to remember when thinking about the true cost of "free." The learning curve is steep with DemandTools, but this product is widely considered the workhorse for ETL functionality. DemandTools also has robust duplicate management capabilities, and CRMfusion offers other tools targeted directly at those needs which we cover below.

CRMfusion is free for nonprofits.

## Apsona for Salesforce

[apsona.com](http://apsona.com)

One of the experts we interviewed said Apsona "earned high marks" for mass data management. The vendor is courting nonprofits fairly aggressively with its generous product donation program, and its additional batch gift entry tool is meant to work seamlessly with the Nonprofit Starter Pack and provides features competitive with mid-range donor management products. Apsona is designed to be an ETL tool for Salesforce, and can help with data loading, performing mass updates to multiple records, and importing and exporting data. Additionally, Apsona has robust query functionality that can be used to find and group records for mailings or other strategies. It's easy to use for non-technical users. Apsona also has as a multi-step reporting tool that can help draw data across objects together, which is challenging to do in Salesforce. Multi-step reporting costs an additional fee.

Apsona for Salesforce offers up to 10 free licenses for nonprofits for the base product through an application process, which includes support as needed. Otherwise, it costs \$1,152 per user, per year for the base product; \$1,152 per year for Multi-Step Reporting; and \$720 per year for up to five licenses for the Batch Data Entry tool.

## Duplicate Management Tools

Duplicate records make it difficult to get accurate information about how your constituents are interacting with your organization. These apps help you search for duplicates, either while manually adding a new record or through imports.

### Dupe Catcher

[www.dupecatcher.com](http://www.dupecatcher.com)

Dupe Catcher is an app provided for free for everyone, not just nonprofits; it lets you know if there's a duplicate record within the system after you try to save a new record. However, it doesn't catch duplicates during any import processes.

Dupe Catcher is free.

### RingLead Unique Entry

[www.ringlead.com/salesforce-applications/unique-entry](http://www.ringlead.com/salesforce-applications/unique-entry)

Unique Entry is another real-time duplicate management app, which searches for duplicates as you type in a new record and prompts you when there is a match within the system even before you save it. It's also a bit easier to get up and running than similar tools.

RingLead is free for nonprofits.

### PeopleImport and DupeBlocker by CRMfusion

[www.crmfusion.com/dupeblocker](http://www.crmfusion.com/dupeblocker)  
[www.crmfusion.com/peopleimport](http://www.crmfusion.com/peopleimport)

CRMfusion offers PeopleImport and DupeBlocker free to nonprofits through product donations. One of the consultants we interviewed recommended it "despite issues with the one-to-one model" of the Nonprofit Starter Pack, and challenges with implementation. PeopleImport is designed to look for contact matches and duplicates before uploading data. DupeBlocker, the vendor's real-time duplicate management app, is also part of the product donation program. DupeBlocker checks for duplicates as you type, and notifies you of potential matches before you save a new Contact or Organization.

PeopleImport and DupeBlocker are both free for nonprofits.

## Cloudingo

[www.cloudingo.com](http://www.cloudingo.com)

A powerful duplicate management tool, Cloudingo comes from the same vendor as the free Dupe Catcher app, but provides a lot more functionality. The app has a special dashboard that helps you manage and merge duplicates. It's not designed to work with the Nonprofit Starter Pack, however, so households might cause particular challenges.

The tool costs between \$996 and \$1,596 per year for your entire Salesforce instance. The vendor offers a nonprofit discount, but doesn't publish the details.

## Other Data Management Tools

There are plenty of other tools to help you with specialized data needs, and we've collected the ones our experts mentioned as particularly valuable below.

### GridBuddy Free

[www.salesforceappbuddy.com/gridbuddy-sales-cloud-landing.html](http://www.salesforceappbuddy.com/gridbuddy-sales-cloud-landing.html)

If the Nonprofit Starter Pack's data management capabilities aren't robust enough for your organization's needs, GridBuddy might be worth exploring. It allows you to more easily manage data across objects by giving you the ability to do inline edits and mass delete related records on a single page. The basic, free version was mentioned by one of the experts we interviewed as quite helpful.

GridBuddy Free costs nothing for the version recommended for most nonprofits.

### Passage Technology Rollup Helper

[www.thinkreid.com/products/rollup-helper](http://www.thinkreid.com/products/rollup-helper)

Previously, nonprofits needed to code from scratch if they wanted to roll up data from different fields—for instance, to aggregate data across Contacts or Donations objects. Rollup Helper is a free app that lets you do this, even in custom objects, without coding.

Rollup Helper is free for everyone, not just nonprofits. Nonprofits can get a special nonprofit edition of Rollup Helper that has more of the enterprise features. For more information, visit <http://www.thinkreid.com/products/rollup-helper/nfp-discount>.

### Qandor Field Trip

[appexchange.salesforce.com/listingDetail?listingId=a0N300000003HSXEEA4](https://appexchange.salesforce.com/listingDetail?listingId=a0N300000003HSXEEA4)

Another free app praised by several of the experts we interviewed, Field Trip does an analysis of how much data you have in both custom and standard fields to see if you're really using those fields. It can help you identify obsolete fields, especially if you've got an implementation that's been around for a while.

Field Trip is free for everyone, not just nonprofits.

### CloudFixer Analyzer

[www.cloudfixer.co/analyzer](http://www.cloudfixer.co/analyzer)

CloudFixer Analyzer is really a service to be scheduled, not an app. The tool runs a report on your Salesforce data and provides you with information on how clean and usable your data is: Are there dead records, or records lacking required information? Do you have unnecessary tabs or objects cluttering up your instance? Can your data be reported on? CloudFixer offers a special report that's designed to analyze the Nonprofit Starter Pack.

CloudFixer costs one-time fee between \$200 and \$1,250 depending on how complex a report you need.

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# DATA SYNCHRONIZING AND MIDDLEWARE APPS

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Since not all software products have built-in integrations with the Salesforce platform, there are vendors whose solutions provide nothing more than the ability to sync data between your implementation and other tools. Sometimes described as middleware, the following are a few of the solutions mentioned by our experts.

## Cazoomi SyncApps

[syncapps.cazoomi.com](http://syncapps.cazoomi.com)

Cazoomi is a vendor that provides tools with the ability to sync data between external software and a variety of CRM platforms. The vendor's Salesforce integration includes not just the MailChimp sync most often mentioned by the consultants we interviewed, but also the email service providers ExactTarget, VerticalResponse, and Delivra; NetSuite's accounting package; iCapture's survey software; and One Call Now's emergency notification software.

Cazoomi offers nonprofits a 50 percent discount on its services. The Salesforce integration is only available at the Professional and Enterprise price tiers, which cost between \$300 and \$600 per year.

## Zapier

[zapier.com](http://zapier.com)

Zapier is another popular option—the vendor offers a variety of “Zaps” for Salesforce, which is their term for the connection between two products. Zapier syncs data periodically—between five and 15 minutes, depending on how much you pay for the tool—and

some of the many existing integration templates that might interest nonprofits include those for Wufoo form entries, Google's productivity and office software, Evernote, PayPal, and MailChimp. No coding ability is necessary. Its main limitation when used with Salesforce is that it can only create new records, not update existing ones.

Zapier's Salesforce integrations are included in the plans that cost between \$153 and \$1,010 per year with the vendor's 15 percent nonprofit discount.

## Boomi AtomSphere

[www.boomi.com/solutions/salesforce](http://www.boomi.com/solutions/salesforce)

Boomi AtomSphere is sold by the software giant Dell, and is designed to connect almost any cloud-based solution to your Salesforce implementation. It's quite popular in the for-profit sphere. We didn't hear much about it from the consultants we interviewed, which may be an issue of cost—it's a very expensive tool.

The least expensive pricing tier of Boomi AtomSphere is \$24,000 per year, and while the vendor advertises a nonprofit discount on the AppExchange, we weren't able to find the details.



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# DONATION TRANSACTION PROCESSING

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To turn your Salesforce implementation into a system that can help you take donations online, you'll need to set up an integration with a transaction processing vendor so that data can flow directly into the system. You'll find lots of options here. Which one you choose will depend not only on cost, but on whether you need branded forms, credit and debit card processing, eCheck and ACH, event registration capabilities, recurring donations, mobile responsiveness, and other considerations.

This is an area where pricing schemes vary considerably, so make sure you're able to truly compare your options apples-to-apples between companies. It's also possible to configure Salesforce to work with a payment processor yourself, but since there are so many providers out there, it's not generally recommended to do so. Some constituent management solutions on the platform, like Causeview from Breakeven, also provide infrastructure to help you take donations.

Finally, you can investigate having your organization's content management system integrate with Salesforce to accept donations—which may be practical if you use a system like Drupal that has a sophisticated integration, but would be a complex and nontrivial endeavor. There's considerable overlap in this area between Event Management and Social Fundraising and Peer-to-Peer app vendors, so it's worth analyzing your needs in all these areas at once before selecting a partner.

## Click & Pledge

[clickandpledge.com](http://clickandpledge.com)

The name that came up most often in our research in this area was Click & Pledge—possibly because the software is free, so you only pay per-transaction, and the vendor markets its service as being designed especially for nonprofits. One of our consultants said that Click & Pledge's Salesforce integration is better

than all of its peers; another noted that the vendor has done a lot of work making sure the system works with the Nonprofit Starter Pack. Click & Pledge can create Contacts and Opportunities within Salesforce, and has sophisticated matching capabilities as well that go beyond just looking for an email address match. Click & Pledge also offers a robust online knowledge base and an apparatus that lets you do on-site payment using a smart phone. In addition, the vendor offers an event management and social fundraising tool. There are drawbacks to Click & Pledge though: setup and configuration is complex and can be confusing, and the free tier of customer service doesn't draw much praise, although there is now a paid tier as well.

The Click & Pledge app is free to acquire, but the vendor charges a processing fee of between 2.75 percent and 3 percent, plus a fee of between 15 and 30 cents per transaction and a monthly fee of between \$20 and \$50. The monthly fee is typically waived when the client works with a consulting partner. All of these depend on which plan you choose.

## iATS Payments

[home.iatspayments.com](http://home.iatspayments.com)

This Canada-based solution is designed for nonprofits and charities and includes Aura, which provides secure online donation forms that match the look and feel of your website, and Brickwork, which provides integration with Salesforce, including the Nonprofit Starter Pack. Our experts described the tool as easy to use, very simple, and straightforward, and quicker to set up than Click & Pledge. iATS lets you process recurring and ACH transactions, and there's a shopping cart for merchandise sales as well. The consultants we interviewed seemed to think there were more features to be added to iATS in the near term, but right now there's no great way of accepting event payment through the tool. Brickwork also integrates well with the Auctions for Salesforce app.

Cost: Aura and Brickwork are both free to download from the AppExchange. iATS costs 21 cents per transaction, then between 2.39 percent and 3.20 percent of the transaction, depending on the credit card used. On top of this, you'll pay \$365 per year for the software and an annual PCI compliance fee.

### Linvio PaymentConnect

[www.linvio.com/paymentconnect.php](http://www.linvio.com/paymentconnect.php)

PaymentConnect has a slightly different model from the solutions above, as it's designed not to support fundraising but for commercial enterprises to accept payments. PaymentConnect doesn't include a payment gateway or processor, so you'd need to set up your own merchant account. However, PaymentConnect does integrate with many of the commonly used options out there, like Authorize.net and PayPal. The robust tool is native to Salesforce, though it has a few oddities working with the Nonprofit Starter Pack. Several of our experts didn't feel that PaymentConnect was the best option for most nonprofits, unless you need substantial functionality and the ability to sell goods online in an e-store. It's also widely used outside the nonprofit sector, and the customer service is highly praised, but the solution will cost you.

For PaymentConnect, you'll need to pay an upfront setup fee that ranges from \$675 to \$1,200 with the nonprofit discount. You'll also pay a minimum of \$750 per year for the most basic edition, which includes up to 10 named users, and increases steeply from there.

### FormAssembly

[www.linvio.com/paymentconnect.php](http://www.linvio.com/paymentconnect.php)

One practical option for those interested in integrating the online donation process with Salesforce is to use a form-building tool; FormAssembly is one of the options most often recommended. It offers a secure payment form template creation service, as well. To do this technical work successfully might require the

help of a consultant, but if you already use FormAssembly to collect online data, the configuration costs could make sense. One of the experts we interviewed said FormAssembly was extremely flexible, allowing users to map "anything to anything." For this option, you'll need a merchant account and payment gateway, which are sometimes offered by the same provider, such as Authorize.net.

FormAssembly offers three free months to qualified nonprofits on the tiers of the product that cost between \$168 and \$468 per year.

### Soapbox Engage

[www.soapboxengage.com](http://www.soapboxengage.com)

From the consulting firm PICnet, Soapbox Engage includes an online donation form-building tool built on the open-source Content Management System Joomla!, and lets you accept online donations and associate them with a Contact, Campaign, and Donation Opportunity record in Salesforce. It's designed to work with the Nonprofit Soapbox, the complete content management solution PICnet has built on Joomla!, but it can also exist alongside your existing website. Right now, the tool works with PayPal Website Payments Pro, PayPal Standard, Authorize.net, Braintree, TouchNet, and CyberSource to process payments, and while the experts we spoke with praised the tool for its user-friendliness, at least one felt it was not ready for bigger implementations quite yet. However, all had wonderful things to say about the support offered by PICnet. Soapbox also offers event management and broadcast email tools profiled elsewhere in this guide.

There's a very basic version that costs \$108 per year, but most nonprofits will find they need the version of the product that costs \$1,188 per year, plus a \$500 startup cost.

Other donation processing solutions mentioned by our consultants include StayClassy and Fundly, both of which are profiled in our Social Fundraising Campaigns section.

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# EVENT MANAGEMENT

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Nonprofits looking to use Salesforce to help manage events have a host of apps and integrations from which to choose. Which one you select will depend on your needs. Is the event free, or paid? Do you need to manage tickets or a wait list? Will there be assigned seating? These apps are listed below in rough order from least complex to most complex. Many of these integrate with donation-processing apps, as well. We've classified a few apps under broadcast email—including Vertical Response, for example—that also offer some event functionality. Nonprofits that manage lots of performance events may want to consider PatronManager CRM, reviewed in the Constituent Management section.

## Eventbrite Sync

[www.eventbrite.com/l/salesforce](http://www.eventbrite.com/l/salesforce)

Eventbrite is a popular online event reservation system that's free to use, although you need to pay for processing fees for paid events. This tool isn't an app, per se, but a means of importing data into Salesforce from an existing Eventbrite account built by the consulting firm Groundwire with support from Idealist Consulting. The connector was praised by our community of experts for its simplicity and ease of use, but we also heard it can be problematic when doing large imports, creating multiple registrations, or dealing with custom fields. Additionally, Eventbrite cannot handle assigned seating, although it can support ticketed events.

Eventbrite Sync is free, though Eventbrite charges a processing fee of about 3 percent per ticket.

## Click & Pledge Event Management

[www.clickandpledge.com/platforms/salesforce/Event\\_Management\\_Registration](http://www.clickandpledge.com/platforms/salesforce/Event_Management_Registration)

Click & Pledge has a popular payment processing solution (see Donation Processing for an overview of that tool), so nonprofits that use it might be interested in using the vendor's event management app as well, since the two integrate directly. Our experts say that the tool supports general admission events quite capably, and is easy to pick up. You'll be able to see event registrants in your Salesforce instance in real time; the app can handle ticketed events, on-site check-in, and discounts and coupon codes, and can manage free events as well. However, it probably isn't suitable for conference-style events or anything that requires reserved seating, like theater performances.

While it's free to acquire the app, Click & Pledge charges a processing fee of between 2.75 percent and 3 percent, plus a fee of between 15 and 30 cents per transaction, and a monthly fee between \$20 and \$50. The monthly fee is typically waived when the client works with a consulting partner. All of these depend on which plan you choose.

## Soapbox Events for Salesforce

[www.soapboxengage.com/soapbox-events-for-salesforce](http://www.soapboxengage.com/soapbox-events-for-salesforce)

Part of the Soapbox Engage suite of add-ons designed by the consulting firm PICnet, Soapbox Events focuses on creating sophisticated online event registration forms that sync up with your Salesforce instance. You're able to offer a variety of tickets and reservation options to your constituents, which are associated with Contacts, Campaigns, and Donation Opportunities

within Salesforce. Our experts had generally positive things to say about Soapbox Events, although a couple of people we spoke to felt that it was not quite up to the task of managing very large events.

Soapbox Events is included in the Soapbox Engage suite pricing, which costs about \$1,200 a year with a startup cost of \$500.

### Linvio Events

[linvio.com/linvio\\_events.php](http://linvio.com/linvio_events.php)

Linvio Events is a natively built Salesforce App that integrates with the Linvio PaymentConnect payment processing app (see Donation Processing for an overview of that tool). As such, it may be of interest for nonprofits already using PaymentConnect—for Linvio Events to properly manage payments, you're required to have PaymentConnect. The tool includes the ability to launch Sites pages online that can accept registrations from your constituents, as well as integration with mobile devices to help with on-site check in. It's a strong tool, but expensive.

Pricing is only available “upon request,” according to the vendor, with discounts for nonprofits. Clients have reported their costs around \$3,000 per year, including the PaymentConnect solution.

### RegOnline Salesforce Integration

[appexchange.salesforce.com/listingDetail?listingId=a0330000002gSSiAAM](http://appexchange.salesforce.com/listingDetail?listingId=a0330000002gSSiAAM)

For those nonprofits using RegOnline event registration software from ACTIVE, there is a Salesforce integration available for download on the AppExchange, although it is a private listing and seems to get mixed reviews from the community. However, the

vendor has posted instructions on how to configure the app at <http://blog.regonline.com/2010/09/08/integrate-with-salesforce-part-1/>.

This service is free for existing RegOnline software customers.

### Cvent Event Management

[www.cvent.com/en/event-management-software](http://www.cvent.com/en/event-management-software)

Cvent touts itself as the world's largest event management provider, and has an integration with Salesforce to bring the data from its software into the system. Our experts recommend it for substantial needs, such as multi-day conferences with reserved seating, but not for the general event management needs of most nonprofits. However, the integration was referred to as “clunky” by at least one person we interviewed. Integration is one way from Cvent to Salesforce, allowing the nonprofit to capture all registrations and similar actions, but all efforts must be managed within Cvent.

Pricing is only available “upon request,” according to the vendor, with discounts for nonprofits, but it's been quoted at around \$1,000 per year for the integration only (the Cvent software costs much more).

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# AUCTION MANAGEMENT

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If you're looking for an add-on to help you manage on-site auctions within your Salesforce implementation, the marketplace is small. Our research turned up just one app—luckily, it's well-documented, and comes from a trusted expert in the Salesforce for nonprofits sphere. It's also an open source product, and it's free.

## Auctions for Salesforce

[appexchange.salesforce.com/listingDetail?listingId=a0N300000003IID7EAK](https://appexchange.salesforce.com/listingDetail?listingId=a0N300000003IID7EAK)

Originally built by a consultant working for the Groundwire consulting firm who now works for the Salesforce Foundation, Auctions for Salesforce is a free add-on that integrates well with both iATS

Brickworks or Click & Pledge's donation processing. When downloaded, the Auctions app creates a custom Auction object with a set of underlying campaigns that can help you track tickets, sponsorships, donations, bundling, and even event check-in. The app also helps you track the fair market value of donated items against how much they sold for, and can generate itemized PDF receipts of both the fair market value and deductible amount. Auctions for Salesforce is open source, so the code is available to expand. The tool requires the Campaigns object. If you're not using either Click & Pledge or iATS Brickworks for donation processing, installation and configuration may be a bit trickier.

This app is free.



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# SOCIAL FUNDRAISING AND PEER-TO-PEER CAMPAIGNS

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Since the success of peer-to-peer fundraising is reliant upon the strength of your supporters' relationships, integrating the management of these efforts in Salesforce makes a lot of sense. Until recently, there was a bit of a gap in this space, but there are now a few new tools that can help.

## StayClassy

[www.stayclassy.org](http://www.stayclassy.org)

According to our team of experts, StayClassy is the dominant solution in this market. Described as “the most interesting solution” in the peer-to-peer arena by one of our consultants, StayClassy's Salesforce integration is available for customers on the most expensive Pro tier of the subscription model. The vendor offers a setup wizard that walks you through the process of connecting the Nonprofit Starter Pack, roundCause, or Salesforce “vanilla” to StayClassy, but not a product on the AppExchange. The integration creates four custom objects within your implementation—Individual Fundraising Pages, Team Fundraising Pages, Recurring Donors, and Designations—but works mostly with standard objects within the system, which is considered to be a best practice. Information about your constituents' team fundraising efforts within StayClassy will appear as Opportunities in Salesforce.

Integration itself is free for customers on the Pro pricing tier of the solution, which costs about \$6,000 per year, billed monthly, as well as a fee of 1 percent per transaction.

## Click & Pledge GiveBig

[clickandpledge.com/platforms/peertopeer](http://clickandpledge.com/platforms/peertopeer)

Click & Pledge, which also offers a donation-processing and event management solution profiled elsewhere in this report, created the GiveBig product out of a customized solution designed for a day-of-giving effort run by the Seattle Foundation. It's

meant to support major social fundraising efforts run by an organization or network, and lets your donors create custom fundraising pages with a real-time sync to Salesforce. The product includes custom reports and real-time dashboards. Click & Pledge provides straightforward instructions on getting the system configured with your implementation, and to work properly, you'll need to pay for a Click & Pledge account for donation processing. It's a new tool—the event for which it was designed just happened in May of 2013. One of our consultant experts felt it had lots of promise, and had the most thoughtfully designed integration with Salesforce, but a few others we spoke to felt it was too soon to tell whether GiveBig would add significant value to the space.

GiveBig's pricing is provided as a custom quote by Click & Pledge. Additionally, Click & Pledge charges a processing fee of between 2.75 percent and 3 percent per transaction, and a monthly fee of between \$20 and \$50.

## Click & Pledge Connect

[connect.clickandpledge.com](http://connect.clickandpledge.com)

The other social fundraising tool from Click & Pledge is meant to support campaign-based efforts that are smaller in scale than GiveBig, and also allows for the creation of campaign websites and personal fundraising pages. The tool includes unlimited campaigns and customizable widgets that feed into your Salesforce implementation, and documents the activity of your constituent-fundraisers within their Salesforce records. Our consultants hadn't heard much about the Connect tool, but it's free for Click & Pledge customers.

Connect is provided for free as part of Click & Pledge's suite of products. Click & Pledge charges a processing fee of between 2.75 percent to 3 percent per transaction and a monthly fee of between \$20 and \$50.

## Fundly

[fundly.com](http://fundly.com)

Another popular peer-to-peer tool that allows for individual fundraising pages, Fundly doesn't have an app on the AppExchange, but does offer a middleware solution for its clients on their higher pricing tiers that can bring data into Salesforce via a daily sync. That sync matches information in Fundly to the standard Salesforce objects Campaigns, Contacts, Opportunities, and Transactions. One of our consultant experts felt the integration was useful, but that a real-time sync would be much more valuable than a daily one.

The integration doesn't cost anything extra, but you'll need to pay for one of the more expensive tiers of Fundly, which start at \$1,200 per year plus fees of 3.9 percent per transaction.

## RallyBound

[rallybound.com](http://rallybound.com)

We heard less about RallyBound from our experts than about its competitors, but the vendor does have an app on the AppExchange, and one of the consultants we interviewed praised its integration for the way it uses standard objects. RallyBound allows for custom social fundraising pages for causes. The app creates a Salesforce contact record for new registrants in a RallyBound site, and tracks donations made in the tool as opportunities. The app also assigns hard- and soft credit for the donor and the fundraiser-constituent, respectively.

The app itself is free for RallyBound customers. RallyBound has an interesting pricing model: The vendor charges a \$2,000 setup fee for a three-year license, and a 4 percent fee per transaction.

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# FUNDRAISING STRATEGY AND TACTICS

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In our conversations with consultants, a few tools emerged that could help a nonprofit's fundraising efforts but that weren't readily categorized with others above. We've included them in this section.

## Groundwire Engage

[www.gwengage.com](http://www.gwengage.com)

Originally developed by a consulting firm that's no longer in existence, Groundwire Engage is still available. The app analyzes the data in your Salesforce instance and classifies constituents according to an engagement pyramid to help you see if your supporters are giving on a par with their engagement level. It's also got some dashboards to help you measure constituent engagement.

Groundwire Engage costs \$960 annually for the minimum 10-user package, and \$96 per year for each user above this limit.

## Springboard

<http://www.jacksonriver.com/springboard>

From the consulting firm Jackson River, Springboard is a comprehensive fundraising and marketing platform built on the Salesforce platform as well as the open-source Drupal CMS. The package includes online fundraising and donation processing, advocacy and petitions, email marketing, and content management. While Springboard was previously targeted mostly at larger, enterprise-level nonprofits, the firm is also rolling out a version of the tool aimed at smaller organizations.

Springboard is available to new clients through referrals, and pricing is upon request.

## WealthEngine

[www.wealthengine.com/nonprofit/solutions/research/database-integration/wealthengine-salesforce](http://www.wealthengine.com/nonprofit/solutions/research/database-integration/wealthengine-salesforce)

WealthEngine is a well-known donor and prospect research service that has an integration with Salesforce on the AppExchange. The app provides the WealthEngine score calculated for a donor within a Contact record. If you're an existing WealthEngine client, you can download the app for free.

The WealthEngine app is free, but the service costs at least several thousand dollars per year.

## Cloud for Good Donation Split

[appexchange.salesforce.com/listingDetail?listingId=aON300000059P3fEAE](http://appexchange.salesforce.com/listingDetail?listingId=aON300000059P3fEAE)

Another app developed by a consulting firm, this one comes from Cloud for Good. It's meant to help split gifts across different program areas, codes, and budget years, and it's designed to work with the Nonprofit Starter Pack. Donation Split also includes a reporting feature, and is offered free of charge. AppExchange users give it high ratings for usefulness and value.

DonationSplit is free.

## Campaign Combiner from Groundwire

[appexchange.salesforce.com/listingDetail?listingId=aON300000003IIDHEAO](http://appexchange.salesforce.com/listingDetail?listingId=aON300000003IIDHEAO)

Campaign Combiner was also developed by the now-defunct consulting firm Groundwire. It's a free VisualForce page that helps you copy members from one Campaign to another, merge Campaign members into new Campaigns, and exclude other members.

Campaign Combiner is free.



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# MAIL MERGE UTILITIES

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One of the most-often acknowledged weaknesses of Salesforce and the Nonprofit Starter Pack is its lack of real out-of-the-box support for document mail merges, especially for Mac users. Nonprofit staffers interested in using the platform as a CRM tool will likely balk if they can't generate printed documents or PDFs right from the system. Luckily, there are a few very useful apps available that can make up for this lack of functionality, as well as a set of tools developed by Salesforce itself. When choosing your mail merge utility, make sure that it will work with your particular implementation, as our experts mentioned that the way in which these tools in particular interact with certain standard objects can be tricky for users of the Nonprofit Starter Pack or other heavily customized implementations. You'll also need to consider whether you need to do "point" merges or one-off merges from a single record, or "batch" or "mass" merges, which can take data from multiple records. This is the difference between a one-off thank-you for a single gift and a batch acknowledgement process, for instance.

## Salesforce Extended Mail Merge

[help.salesforce.com/  
HTViewHelpDoc?id=mailmerge\\_mass.  
htm&language=en\\_US](https://help.salesforce.com/HTViewHelpDoc?id=mailmerge_mass.htm&language=en_US)

Nonprofits on very tight budgets and with some tech-savviness might consider the Salesforce Extended Mail Merge feature, which lets you generate Microsoft Word documents from Salesforce records. It's available for download only by request from Salesforce.com Customer Support, and requires some back-end configuration by your administrator. Additionally, it only works if you have both Microsoft Office and Windows XP or Vista. You're also confined to fewer than 1,000 records at a time, and file limits of 1MB for templates and 50 MB for mass mail merges. If you have minimal requirements for mail merge and you can figure out how to set the feature up, it might be enough for your needs.

This tool is free, but only available for download by request from Salesforce.com Customer Support.

## Conga Composer

[www.congamerge.com/products/composer](http://www.congamerge.com/products/composer)

One of the most widely used apps on the entire AppExchange for over a decade, Conga Composer is obviously quite popular for nonprofits and for-profits alike. It offers a wide variety of features and is endlessly configurable. However, one of our consultant experts described Conga Composer as "brilliant but complicated." Another said "it's not horribly complicated once you understand it," but to use its power, "you need to have a deep understanding of the underlying data structure. Once you've set it up, it's beautiful and easy." Additionally, we've heard nearly universal raves for Conga's customer support staff. If you need to generate a lot of documents in mass and you do lots of mail merges, it seems particularly strong. But the power will cost you, so it's worth making sure whether you actually need such a complex tool. The consultants we interviewed said many of their clients need ongoing help to maintain Conga due to its complexity.

Conga offers a discount of 33 percent to nonprofits, but requires a five-user minimum package, which costs \$480 a year.

## Drawloop LOOP Document Services

[www.drawloop.com/products/loop-document-services](http://www.drawloop.com/products/loop-document-services)

Conga Composer's main competitor for mass mail merges receives praise for its comparative user-friendliness and robust flexibility. One expert we interviewed described himself as a "big fan of how the wizard is set up," explaining that unlike Conga Composer, organizations (or their consultants) don't need to open up the back end of Salesforce to get the system properly

configured. Drawloop can accommodate complex merge requirements where multiple related records are compiled into a single merge. The mass merge functionality in Drawloop currently relies upon list views, which have a 200-record limit; however, new functionality to conduct mass merges from reports is coming soon.

Drawloop offers a discounted fee of \$129.60 annually per user to nonprofits, and reportedly waives the minimum five-user package. However, there's an additional fee of 20 cents per mass merge created, which could be prohibitively expensive if your organization needs to do lots of these.

### Apsona Email and Document Merge Add-On [apsona.com/pages/sfdc/doc-mail-merge.html](http://apsona.com/pages/sfdc/doc-mail-merge.html)

Referred to as the “up and coming” solution in the space by one of the experts with whom we spoke, Apsona is a dataloading tool with an add-on to support Email and Document merge. This add-on can support mass and point merges (one document at a time). The vendor recently added support for email (through the built-Salesforce tool only), and the ability to merge out to Excel, but still does not appear to support PDFs. Apsona seems to be improving its products very quickly, so it may be worth keeping an eye on this feature to see if more capabilities are added, especially if you already use Apsona as your ETL tool. It's less expensive than either Conga Composer or Drawloop.

Apsona for Salesforce offers up to up to 10 licenses for free to nonprofits for the base product. Organizations will need to pay \$150 year for the Email and Document Merge Add-on, which includes three licenses, and \$50 per year for each additional license.

### Me2 Systems' S-Docs [www.mesystemsllc.com](http://www.mesystemsllc.com)

S-Docs was mentioned less often than its competitors in our interviews, and none of our consultants directly recommended it. However, Cloud for Good noted that the tool capably handles point merges and is less expensive than other contenders. The vendor markets the solution as a 100 percent native Force.com product, meaning that you edit templates within Salesforce. Cloud for Good's blog pointed out that this might be time consuming for advanced users used to MS Office processes. It's also not compatible with the Professional Edition of Salesforce and doesn't appear to support multiple languages. If your organization outsources direct mail campaigns, for instance, and doesn't mind operating entirely within the Salesforce environment for point merges, S-Docs might be a good option.

S-Docs is free to acquire from the AppExchange, and to use for up to two templates. Above that, the vendor reportedly offers a discounted price of \$72 per user, per year for its “unlimited” pricing tier.

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# SOCIAL MEDIA

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For organizations interested in pulling their social media strategy into Salesforce, it's important to think about whether you need to do social media listening—monitoring what your followers and constituents are saying on social media—or just social media publishing, which is managing, posting, and scheduling your content from within Salesforce. These apps and add-ons can help with one or both of these processes.

## Salesforce Labs Salesforce for Twitter and Facebook

[appexchange.salesforce.com/listingDetail?listId=a0N30000003HpEQEAO](http://appexchange.salesforce.com/listingDetail?listId=a0N30000003HpEQEAO)

Salesforce Labs, the App R&D arm of Salesforce, provides this free app to facilitate searching and monitoring both Facebook and Twitter for mentions of your constituents, and to help you post. Unfortunately, most of our consultants felt that the app was not worth the 15 custom objects and challenging setup process. Organizations need be careful when configuring this app, as it can collect a lot of data very quickly and balloon data storage.

Salesforce Labs provides this app for free.

## HootSuite Salesforce Integration

[blog.hootsuite.com/premium-apps-power-users](http://blog.hootsuite.com/premium-apps-power-users)

A familiar brand for many social media managers, HootSuite provides a popular dashboard to help manage multiple networks and track and analyze mentions of your organization. The vendor has configured an integration with Salesforce that works with Twitter, Facebook, LinkedIn, and Google+. It can create Leads and Cases from social media data in HootSuite, but it's not clear how well it works with the Nonprofit Starter Pack. Confusingly, it's referred to as an "app" but is available only from HootSuite's own App Directory.

HootSuite costs \$60 per year on top of your HootSuite plan, which is free for the most basic version but costs \$108 for the version most nonprofits will need.

## ActionSprout

[actionsprout.com](http://actionsprout.com)

A Facebook-only engagement service designed especially to facilitate calls to action for nonprofits, ActionSprout can be integrated into your Salesforce instance. It's used by some nonprofits with very sophisticated Facebook presences, so if Facebook is a critical part of your communications strategy and your mission focuses on advocacy, it's worth exploring.

ActionSprout is priced based on the number of Facebook fans you have, and ranges between \$300 and \$1,980 per year.

## Salesforce Radian6, Social.com, SocialEngage, and Buddy Media

[www.salesforce.com/marketing-cloud/overview](http://www.salesforce.com/marketing-cloud/overview)

These tools are provided by Salesforce itself, and make up the suite of products branded as the Marketing Cloud. Radian6 provides sophisticated listening and analysis to help facilitate customer service and leads; Social.com is designed to manage advertising campaigns on Facebook and Twitter; and Buddy Media is meant to help with integrated campaigns across channels. These tools are some of the most powerful out there, but their price tag means they will be out of range for all but the biggest nonprofits.

A new addition to the Salesforce Marketing Cloud since the acquisition of ExactTarget, SocialEngage (formerly known as CoTweet and available for free) helps you manage conversations on Facebook and Twitter.

The Marketing Cloud is discounted for nonprofits, but still starts at \$30,000 per year.

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# VOLUNTEER MANAGEMENT

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The Nonprofit Starter Pack doesn't have any out-of-the-box capability to track volunteers, and nonprofits looking to add this functionality have only a couple of options (although several of the constituent management solutions on the platform have built in volunteer tracking). You can also choose to customize the standard Campaigns object to track volunteers.

## Volunteers for Salesforce

[appexchange.salesforce.com/listingDetail?listingId=aON30000003JBggEAG](https://appexchange.salesforce.com/listingDetail?listingId=aON30000003JBggEAG)

The Volunteers for Salesforce app has a pretty long-standing history for a comparatively new technology, and seems to be the most widely used volunteer management app. Developed as an open source app several years ago by a developer who now works for the Salesforce Foundation, the app essentially customizes the Campaigns object to let you assign volunteers to jobs and shifts and keep track of the hours they spend volunteering. Although there's no formal organization supporting Volunteers for Salesforce any longer, the developer actively supports users in dedicated forums on the Power of Us Hub. One of the experts we interviewed said that the app is "doing great," and that "people want to see it survive." Community members are continuing to add functionality, including a tablet-based check-in screen in the most recent release.

Volunteers for Salesforce is free.

## HandsOn Connect

[www.handsonconnect.org](http://www.handsonconnect.org)

The volunteer management solution HandsOn Connect is built on the Force.com platform, and was developed for members of the HandsOn Network, which includes 250 centers worldwide. It's also available for use by organizations outside of the network. Rather than simply managing your own organization's volunteers, the solution is designed to support matching and placement. HandsOn Connect is meant to work as a standalone website, and includes a portal to allow volunteers to manage their own activities. It's also designed to manage bigger events, like a day of service, and includes special custom reports. The price tag indicates that it's a complex solution for organizations that count volunteer management as a significant part of their mission.

HandsOn Connect is available starting at about \$7,200 per year for nonprofits, with a discount for HandsOn Network participants. Custom quotes are available.

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# BACK OFFICE NEEDS

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Nonprofits have been slower to adopt Salesforce to manage back office processes than for fundraising and communications. Since so many small- to medium-sized nonprofits use QuickBooks or a competitor for financial management and generally don't use HR systems, there hasn't been quite as much traction, but our consultants recommended these apps for organizations ready to make the switch.

## Intuit's Salesforce Integration for QuickBooks [appcenter.intuit.com/salesforceintegration](http://appcenter.intuit.com/salesforceintegration)

Intuit does offer an integration for QuickBooks. The app can create transactions in Salesforce that are synced, but users on the AppExchange report some bugs, and it costs an additional fee. It's also not clear how well the integration would work with the Nonprofit Starter Pack.

Pricing is based on which edition of Salesforce you have, and ranges from \$300 to \$780 per year plus what you pay for QuickBooks itself.

## Intacct Financial Management [us.intacct.com](http://us.intacct.com)

A completely cloud-based financial management company, Intacct's popular software has a free integration with Salesforce on the AppExchange. It's generally seen as being in the next tier of complexity up from QuickBooks, and the vendor offers a product targeted directly at nonprofits.

The Salesforce integration is free. Intacct doesn't publish pricing details, but advertises a package that starts at \$5,400 annually for users just "graduating" from QuickBooks.

## FinancialForce Accounting

### [www.financialforce.com](http://www.financialforce.com)

As its name suggests, FinancialForce offers tools built on the Force.com platform to manage financial processes, and the accounting package was mentioned during our interviews as a potential option for nonprofits. It's a fully functioning, cloud-based general ledger, invoicing, and accounts receivable and payable system, but it's not clear how many nonprofits are using the tool yet. Unless the vendor's discount for nonprofits is significant, it's also a very expensive product.

FinancialForce Accounting starts at \$9,000 per year. The vendor advertises a discount for nonprofits, but does not publish the details.

## FinancialForce Human Capital Management [www.financialforce.com/products/human-capital-management/financialforce-hcm](http://www.financialforce.com/products/human-capital-management/financialforce-hcm)

This tool was formerly known as Vana Workforce before it was acquired by FinancialForce, and provides a native-built Force.com means of managing human resources needs like benefits, compensation, performance management, succession planning, and analytics. It's a huge managed package designed for the for-profit sector, with 157 custom objects and 128 custom taps, and it's unclear how well it works with the Nonprofit Starter Pack. However, it's the only HRIS system that our consultants recommended.

Before its acquisition by FinancialForce, Vana started at \$108 per user annually; we were unable to find any updated pricing information.

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# CASE MANAGEMENT

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The Nonprofit Starter Pack is designed to help nonprofits manage their fundraising and communications efforts, but lacks built-in capability to provide case management for organizations providing direct services. The infrastructure of Salesforce is well-designed to support such work, and the add-ons below might be preferable to and less expensive than custom development work. However, firms such as ACF Solutions specialize in configuring Salesforce to the exact specifications of your nonprofit.

## Exponent Partners Exponent Case Management

[www.exponentpartners.com/exponent-case-management](http://www.exponentpartners.com/exponent-case-management)

The well-respected consulting firm Exponent Partners has developed a case management solution that's designed to work with the Nonprofit Starter Pack and that can help staffers perform intakes, track

services, and manage outcomes in Salesforce. ECM was developed to work especially well for workforce development programs, although it's designed to support other types of nonprofits as well.

Pricing available upon request from Exponent Partners.

## Circe for Salesforce

[cirqesoftware.com](http://cirqesoftware.com)

Circe for Salesforce is an app designed for client management for social services agencies, and is targeted at mid-sized organizations. Circe was originally developed as a custom tool for a nonprofit in San Francisco, and helps with intake management, HIPAA compliance, outcome management, and other client-focused tasks. We were unable to determine how well it works with the Nonprofit Starter Pack.

Circe is sold as an app for \$240 per user, per year.



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# ORGANIZING AND ADVOCACY

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Turning your Salesforce implementation into an organizing and advocacy platform is possible, and these add-ons can help. If you're looking to do more sophisticated work, there are a number of consultants who specialize in tailoring Salesforce to the needs of organizers. There are also interesting add-ons for Salesforce implementations integrated with website content management systems, such as Megaphone for Plone and Soapbox Petitions.

## Cloud for Organizers

[appexchange.salesforce.com/listingDetail?listingId=aON3000000B34aMEAR](https://appexchange.salesforce.com/listingDetail?listingId=aON3000000B34aMEAR)

The consulting firm Cloud for Good, which specializes in Salesforce for nonprofits, created this native Force.com managed package that includes support for phone banking and door-knocking campaigns. The vendor advertises that among other helpful capabilities, the add-on allows your volunteers to print out walk lists by address and to assign phone banking lists to constituents. It includes four custom objects and a custom tab, and is designed to work with the Nonprofit Starter Pack.

Cloud for Organizers is advertised as \$180 per user, per year, with a discount for nonprofits.

## KnowWho

[appexchange.salesforce.com/listingDetail?listingId=aON30000001tHWDEA2](https://appexchange.salesforce.com/listingDetail?listingId=aON30000001tHWDEA2)

KnowWho is a longstanding and well-regarded provider of contact information for politicians that provides downloadable contact directory apps for Salesforce. The information is updated daily, and includes several custom objects, a custom tab, and a custom application. KnowWho offers directories for members of Congress, federal agencies, state legislators and executive staff, and county and municipal officials. It also provides a Lobbying Activity Tracker for staffers to manage and track Congressional lobbying.

Pricing is available upon request.

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# EDUCATION MANAGEMENT

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Both K-12 and higher education institutions have had success managing students in Salesforce. This sector is growing quickly; here are the apps that we turned up in our research.

## 501 Applicant Manager

[501partners.com/our-services/salesforce-apps/applicant-manager](https://501partners.com/our-services/salesforce-apps/applicant-manager)

Built by 501Partners, a consulting firm that specializes in helping nonprofits with Salesforce, Applicant Manager is designed to facilitate the process of processing online applications for scholarships and other processes that require internal and external stakeholders to review them. The online forms are designed to integrate into Salesforce. It's available by request from the 501Partners website.

Pricing available upon request.

## 501 Roll Call

[501partners.com/our-services/salesforce-apps/roll-call](https://501partners.com/our-services/salesforce-apps/roll-call)

Another app from 501Partners, Roll Call is meant to work on a smartphone or tablet. Its capabilities include the creation of classes, assigning of instructors and students, taking attendance, grading, and reporting. It's also not available on the AppExchange, but is available by request from the 501Partners website.

Pricing available upon request.

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# METHODOLOGY

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Idealware researched this report between November 2013 and January 2014, conducting phone interviews with nine consultants specializing in the customization of the Salesforce.com platform for nonprofit needs and three Salesforce.com Foundation staff members. All those interviewed volunteered their time. We also performed extensive web research on the Power of Us HUB and the AppExchange to learn more about specific tools. Some data about the constituent management packages that are built on top of the platform has been taken from earlier Idealware reports and first-hand software demos.

## Conflict of Interest and Funding Sources

This report was funded entirely through the visible ads, directory listings, and product sponsorships purchased by consultants and consulting firms that help nonprofits implement Salesforce. Idealware is committed to unbiased, impartial research—all advertisers committed to payment before the report was distributed for review and none had any control over its text or contents. Although some of the firms that purchased listings also provide tools profiled in this report, the fundraising process was entirely separate from the research process and had no impact on our assessments.

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# OTHER RESOURCES

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For nonprofits looking for more details on the Salesforce platform and the available apps, there's lots of information and resources out there. We've rounded up some of the most reputable sources. Many consulting firms conduct reviews and comparisons of various products.

## Salesforce Foundation Power of Us HUB [powerofus.salesforcefoundation.org](http://powerofus.salesforcefoundation.org)

This free online community is designed for nonprofits in the Salesforce Foundation's product donation program, which has been rebranded as the Power of Us program. It's still fairly new—the HUB launched in July of 2013 in response to requests from the nonprofit community for more help and guidance from the Salesforce Foundation—and some nonprofit subject areas are better represented than others. Still, lots of smart Salesforce experts answer questions there, and it's a great place to ask questions, troubleshoot common problems, or find out about apps. Members of the Salesforce Foundation are in charge of managing the conversations. You can also find regional nonprofit user groups near you. You need a Salesforce login that's associated with a nonprofit in the product donation program to be able to access the Power of Us HUB, though, so it's not for those just looking to dip a toe in the water before committing.

## Salesforce Success Community [success.salesforce.com](http://success.salesforce.com)

Salesforce's online community designed for general users—not just nonprofits—recently marked its one millionth member. Like the Power of Us HUB, you can ask and answer questions and connect with other users, and it's free for those with a Salesforce login. There's also a public user group for Nonprofits Using Salesforce, since not all nonprofits are in the Power of Us product donation program. The Salesforce Success

Community has some areas of the site open to those without a Salesforce login, such as documentation and product guides, which might be useful for those interested in learning more about the technical areas of the platform.

## Cloud for Good Blog [cloud4good.com/blog](http://cloud4good.com/blog)

Cloud for Good, a consulting firm that specializes in nonprofits clients on the Salesforce platform, has been running an extremely useful series on its blog that addresses apps (including some apples-to-apples comparisons of tools) as well as best practices for the best use of Salesforce. As a full disclosure, Cloud for Good is a sponsor of this report, but we'd have highlighted this valuable resource no matter what.

## KELL Partners [www.kellpartners.com/kell-labs](http://www.kellpartners.com/kell-labs)

Another well-known consulting firm and a sponsor of this report, KELL Labs is a great source of information about available tools. For instance, a recent post on the KELL Labs blog about FormAssembly explains the integration with Salesforce quite clearly.

## Forcify.me [forcify.me](http://forcify.me)

These online tutorial videos from the reputable consulting firm Jackson River are designed to help nonprofits navigate Salesforce, and were praised by a number of people with whom we spoke. While the site is in beta, it's free for all users. It's not clear when (or if) the site will start charging, but right now, it's a gold mine of information.

## 501 Commons on Salesforce Apps: What You Need to Know BEFORE You Install

[www.501commons.org/blog/salesforce-apps-what-you-need-to-know-before-you-install](http://www.501commons.org/blog/salesforce-apps-what-you-need-to-know-before-you-install)

This blog post, directed at nonprofits, is such a helpful overview of what Salesforce is and what to think about before you add apps to your implementation that it should probably be required reading for all nonprofits using the tool, or even considering it. It also provides a useful counterbalance to the wealth of information in this report, and a reminder that adding apps shouldn't be done without a clear strategy.

## A Few Good Constituent Relationship Management Tools

[www.idealware.org/articles/few-good-constituent-relationship-management-tools](http://www.idealware.org/articles/few-good-constituent-relationship-management-tools)

For nonprofits interested in the CRM model, but not sure of whether Salesforce is the best option for their needs, this article covers several popular alternatives and goes into a bit more detail about what the term means.

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# ABOUT IDEALWARE

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Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits make smart software decisions. Nonprofits maintain a complicated relationship with technology. Most know that software can streamline their processes and help fulfill their missions more efficiently and effectively, yet lean staffing and tight budgets mean they're unable to devote the time necessary keep up with new technologies and find the right tools.

From the most basic questions (like how to use software to help manage emailing hundreds of people at once), to the more complex (like understanding the role of social networking and mobile phone text-messaging in fundraising strategy), organizations need a trusted source for answers. Idealware provides an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps nonprofits make the most of their time and financial resources.

To learn more, or to sign up to be notified when we release new free reports, articles, or other resources, visit [www.idealware.org](http://www.idealware.org).



# CONSULTANT DIRECTORY

# CONSULTANT DIRECTORY

It often makes sense to hire a consultant or firm to help you implement or make the most of your donor management system. To help you find one, we've compiled a number of the organizations and individuals that offer services in this area.

These are paid listings; each firm paid a sliding scale fee to be included, based on the size of their firm. Those with logos and descriptions paid more for these elements to be included. Idealware has not assessed the services provided, but only aggregated the information given to us by the firms. Conduct your own due diligence before hiring any firm.

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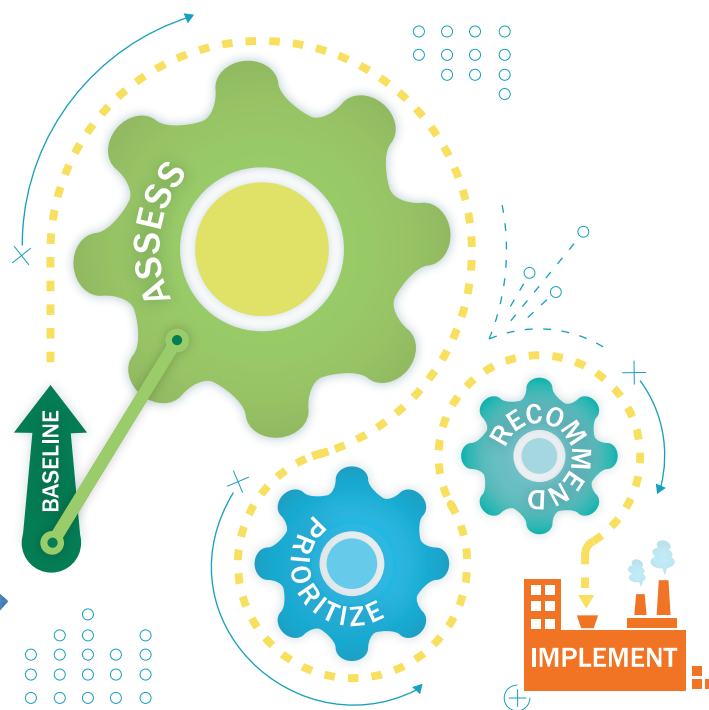
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