

**The Basics of CRM and Salesforce
Or
Teenager Relationship Management It's Not**

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1 CRM – CUSTOMER RELATIONSHIP MANAGEMENT

1.1 IT'S ALL ABOUT RELATIONSHIP

1.1.1 Businesses depend on customers

A relationship with a customer can be very cursory (example: buying a hamburger at a drive-through). Or the relationship might last several years (example: auto insurance agent). But the bottom line for most businesses is about **sales**. Salespeople spend their lives building a widening pool of prospective customers, and trying to deepen relationships with current customers, with the goal of creating more and more sales transactions at higher and higher dollar amounts.

Salespeople and business management know that it is all about **relationships**. Relationships customers and potential customers (prospects) can make the difference between success and growth, or decline and failure.

1.1.2 Nonprofits depend on donors

Nonprofits quickly find that they must adopt many of the disciplines from the business world in order to survive and grow in their mission. Since they must depend mostly upon donations and/or grants, as opposed to sales. **Fundraising is about developing and deepening relationships with donors and potential donors.**

1.1.3 DISCUSSION – Relationships with visitors / supporters

As a representative of Project Onward, how do you develop relationships with visitors / supporters?

What is the impact of (or on) these relationships in regard to money?

2 SALESFORCE INTRODUCTION

2.1 SALESFORCE CRM FOR BUSINESS

Salesforce is Customer Relationship Management (CRM) software developed for salespeople, to help them manage the relationships they have with their potentially thousands of prospects and customers. More than a database of names and contact information, a good CRM tool (like Salesforce) helps determine such things as:

How can I expand my potential base of customers, and best reach them?

Who should I contact today, and how best should this be done?

Who are my “high-value” customers and/or prospects?

Salesforce has grown and morphed through the years, and has become one of the most widely accepted platforms used by large businesses and corporations for CRM.

2.1.1 The Salesforce platform

Salesforce can be customized to fit the many varieties of businesses and organizations. Likewise, **the Salesforce environment provides many ways of interacting. This adds to its flexibility, but also to its complexity.** This is just one view of their products:

The screenshot displays the 'Products Overview' page on the Salesforce website. It features a sidebar on the left with navigation links and a main content area with a grid of product categories. Each category includes a title and a brief description of the product's capabilities.

Category	Product Name	Description
SALES	Sales Cloud	Sales force automation and CRM
	Salesforce CPQ	Configure, price, quote (CPQ) and billing automation
	Data.com	B2B prospecting and data cleansing
INDUSTRIES	Financial Services Cloud	CRM for banking, insurance, wealth management, and more
	Health Cloud	CRM for managing patient relationships
COMMERCE	Commerce Cloud	Digital commerce, point of sale, and order management
	Service Cloud	Fully customizable support and help desk
SERVICE	Desk.com	All-in-one customer support for small business
	Marketing Cloud	Digital marketing platform
MARKETING	Pardot	B2B marketing automation
	Salesforce DMP	Data management platform
ANALYTICS	Einstein Analytics	Business analytics on any data, any device
	Platform and Apps	Salesforce Platform: The #1 platform as a service
PLATFORM AND APPS	AppExchange	App, component, and consultant marketplace
	Lightning	Lightning apps for everyone
COMMUNITY	Community Cloud	Connect customers, partners, and employees
	Chatter	Enterprise social network
PRODUCTIVITY	Heroku Enterprise	Scalable apps for developers
	Quip	Collaborative documents, spreadsheets, and checklists
INTERNET OF THINGS	Salesforce IoT	Platform to connect the internet of things with your CRM

2.1.2 Project Onward currently uses Salesforce “Classic”

The above list highlights a few things to note about Salesforce development over the years:

Salesforce (which has been around for almost twenty years) is evolving, having to support huge and varied base of users (each with a varied list of Salesforce versions and customized implementations), and at the same time, leverage advances in technology to compete with newer CRM products.

“Lightening” is the new interface that can be put on top of Salesforce Classic. It is a complete, new, rewrite of their interface to allow Salesforce to take advantage of much newer internet technology advances. (This is immediately seen in the differences between Salesforce Classic vs Salesforce Lightening when used on a small device, like a Smartphone.)

Project Onward uses the “Classic” version of Salesforce. It doesn’t use the “Lightening” interface. And “Classic” doesn’t even show on the list of products (though it is really underneath many of those products). At this time, Salesforce intends to continue to support “classic,” going forward. But like all other software venders, they are taking increasing advantage of the “cloud” for all their services.

Salesforce offers plenty of Help, Documentation, training videos and classes (most of which are available only to Salesforce users.)

2.1.3 Salesforce is usually Expensive, but FREE for Project Onward

Companies, depending on their needs and number of users, pay *big bucks* for Salesforce. Salesforce offers reduced prices to nonprofits, **as well as ten FREE licenses for nonprofit users (like Project Onward).**

2.2 SALESFORCE CRM FOR NONPROFITS - NPSP

Salesforce CRM – Constituent Relationship Management

Since nonprofits don’t have customers, they had to come up with another “C” word. Hmmm... Not very easy. **I got it! Constituent Relationship Management.**

(Look-up “constituent” in the dictionary. A poor choice of words. But I guess they couldn’t come up with a better one.)

In order to help nonprofits to develop relationships with donors and potential donors (as well as to expand their own market), Salesforce customized their software for use by nonprofits. Salesforce offers the NonProfit Service Pack (NPSP) for customizing Salesforce for nonprofits. **Salesforce at Project Onward has been customized, based on the NPSP.**

2.2.1 Salesforce vs Other CRM Software for Nonprofits

There are a number of other CRM services and products available. A couple popular ones are:

Raiser's Edge –

<https://www.blackbaud.co.uk/fundraising/products/the-raisers-edge-i>

Network for Good –

<https://www.networkforgood.com/non-profit-fundraising-products/donor-management-software/>

Project Onward currently uses Salesforce

Salesforce Advantages

Powerful, highly adaptable and customizable

Strong Help and Support from Salesforce

Widely known, with a wide community for collaboration

Supported by thousands of software vendors for customization and integration with other applications

Salesforce is FREE to Project Onward

Salesforce Disadvantages

It was written primarily for businesses (sales), and then adapted to nonprofits (donors)

The screens are NOT as intuitive as with other products

The screens contain a lot that is not relevant to Project Onward's needs

It requires levels of training for appropriate use

It requires an IT-trained Systems Administrator

2.2.2 DISCUSSION - What SHOULD a CRM do?

What are the processes that Project Onward uses (or should use) for ongoing relationships with donors?

What should a CRM product to help?

2.3 SALESFORCE DATA MODEL

2.3.1 Project Onward Uses the Household Account Data Model



Salesforce supports a number of data models. **A Data Model shows the structure of the relationships between the various Salesforce Objects.**

As pictured above, Project Onward uses the default data model from the *Salesforce NPSP* package: ***the Household Account data model.***

Understanding the Data Model greatly helps in understanding the screens in Salesforce. We will make reference to the Data Model throughout the training.

2.3.2 Salesforce Objects

Salesforce *Household Account* Data Model: Objects

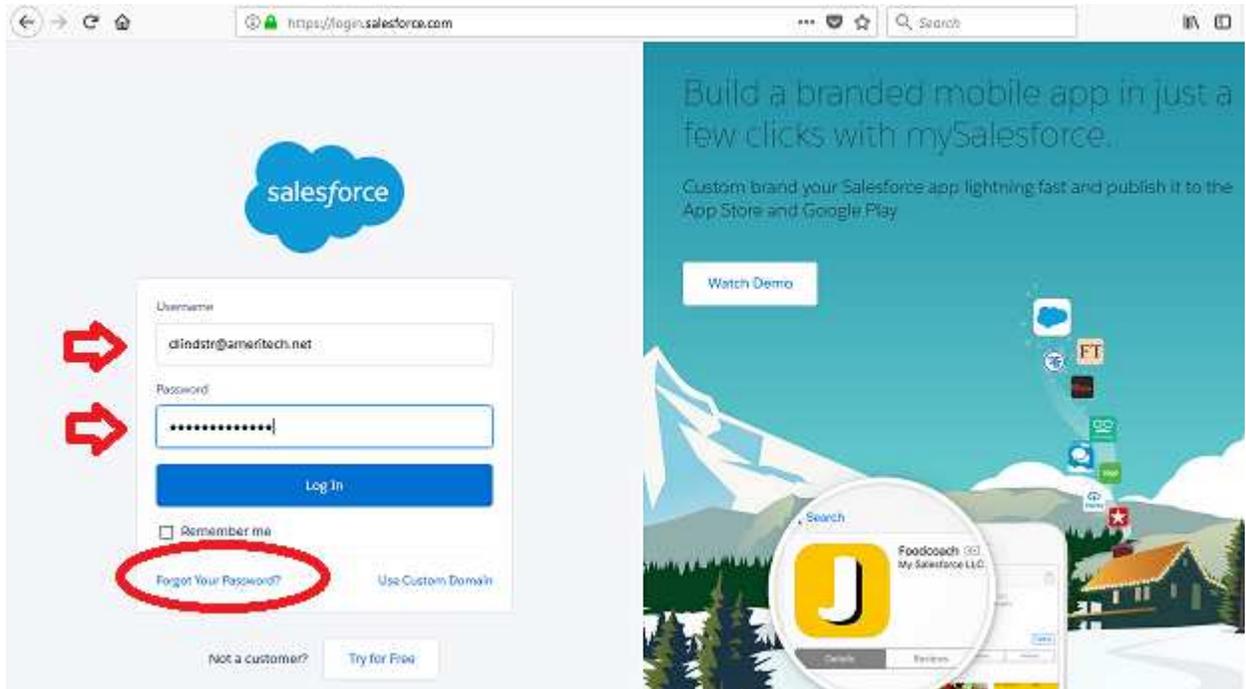
Account	Account – A grouping of one or more people, together for a common purpose. Example: Company, Business, Organization, Household, etc.
Contact	Contact – A person of interest, associated with a Household and possibly affiliated with a company or organization.
Opportunity	Opportunity – A revenue transition (money coming-in) that you want to manage.
Activity	Activity – A record of an interaction with a Contact, a Lead or Opportunity – Example: phone call, email, task, event, etc.
Campaign	Campaign – A targeted outreach event that asks Contacts or Leads for a response. Example: email blast, event, fundraising activity, etc.
Lead	Lead – A person that is potentially of interest. Example: visitor, prospect, email contact, etc.

The above picture shows the **Salesforce Standard Objects**.

An Object is a specific set of information, and relates to sets of screens in Salesforce.

3 GETTING AROUND SALESFORCE

3.1 ACCESSING SALESFORCE



In your web browser, go to: <http://salesforce.com> . It should look something like the above.

3.1.1 Username and Password

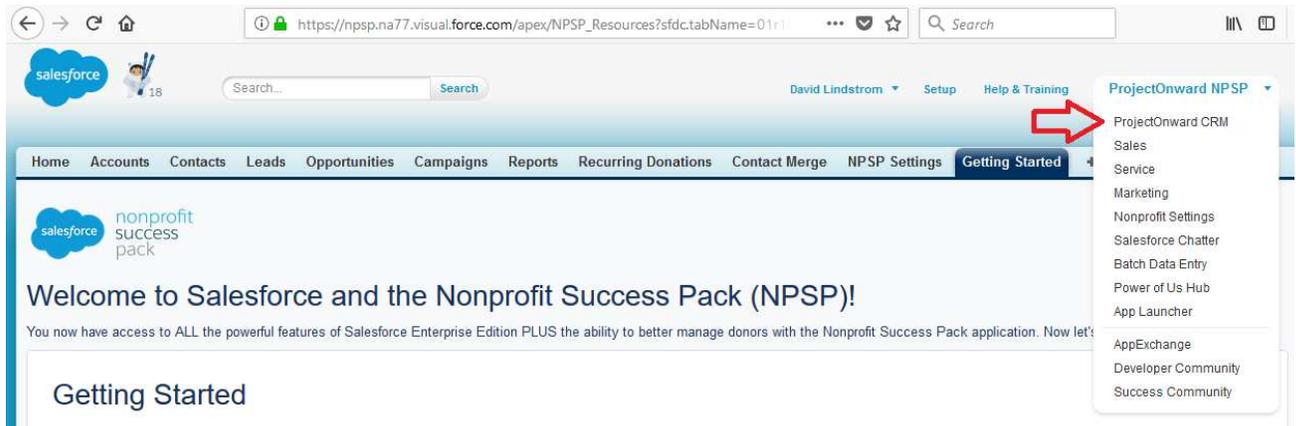
You will have been given a Username (which is usually your email address) by the Systems Administrator. If you haven't already, open your email from Salesforce (subject line: "Verify your account") and follow the directions to establish your password.

TIP: Use some of the suggestions from the earlier training module on Security and Passwords.

Enter your Username and Password and click "Log In."

Note: If you forgot your password, click the "Forgot Your Password" link (circled in red, above).

3.1.2 Make sure you are in ProjectOnward CRM



The top right of the screen has a drop-down (darker-blue field). When you click the field, you can see choices for different views of the Salesforce Platform and services. Clicking a choice will change the look, feel and content of screens.

For normal Project Onward use, make sure it is set to “**ProjectOnward CRM.**” (red arrow, above). Note that *Project Onward NPSP* is a little different.

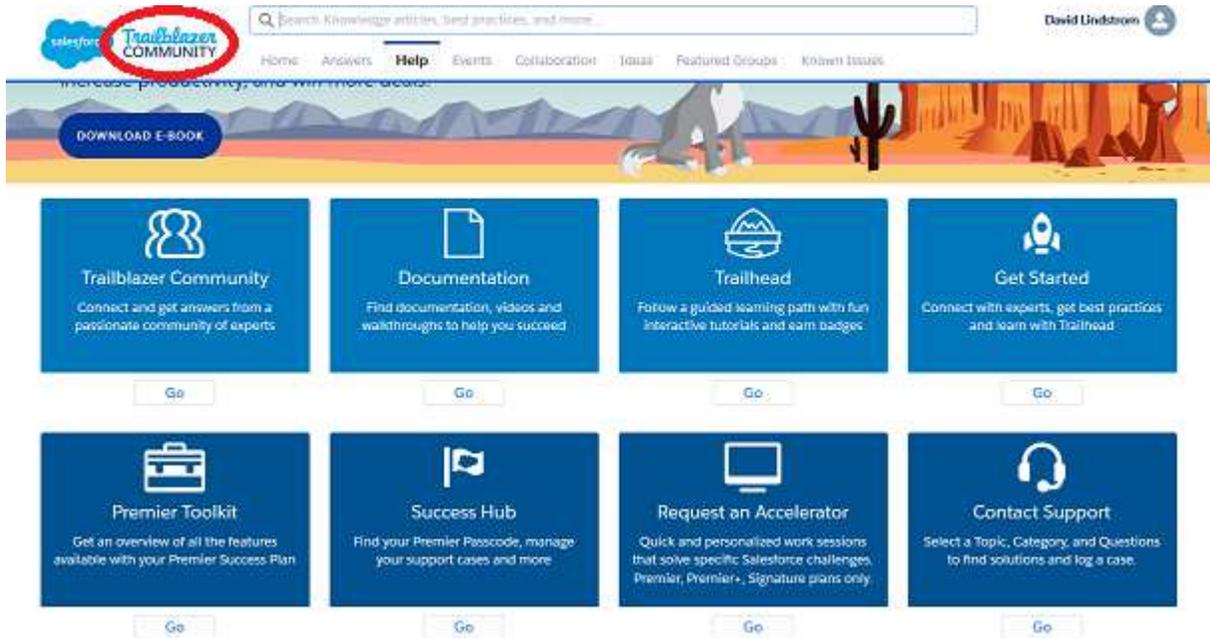
If it is something else, click on “**ProjectOnward CRM.**”

3.2 SEARCH, MENU AND LINKS (AT THE TOP OF THE SCREEN)

3.2.1 Help and Training



Click on the “**Help and Training**” link on the top right of the screen (as above) to get more links to documentation, training, videos, classes than you could even consume in a lifetime (screen below):



The place to start is in the Trailblazer Community (red circle above).

TIP: No matter where you are in “Help,” in the “Hub,” in a “Community,” or elsewhere, filter or search on “nonprofit” or on “NPSP.” This will help you get beyond the tons of Salesforce for business users information.

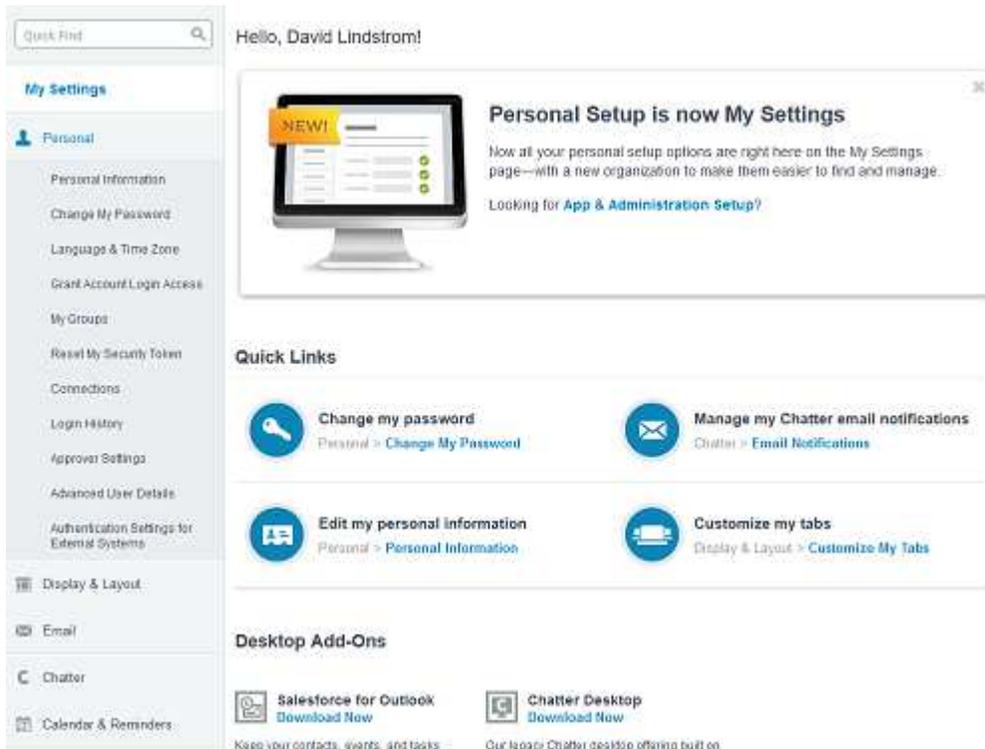
3.2.2 My Settings



On the top right of the screen, click on your Name.

You get a drop-down of choices.

Click on “My Settings” (as shown above).



In the center, white area of the screen, are links for commonly changed settings, such as your password or personal information.

Use the menu to the left to customize your settings and view of Salesforce.

(We will not go through this in the training, but are many training videos available in Salesforce and on the internet (example: Google: "youtube salesforce nonprofit videos").

3.2.3 Menu (Tabs)



As shown above, the Menu is at the top, left-side, in the blue area. The Menu shows on every screen.

Here, I have clicked on Contacts.

3.2.4 More Tabs



There are many more tabs than what are shown in the menu.

Click on the “+,” to the right of the menu tabs (red circle, above) to see more (as pictured below).

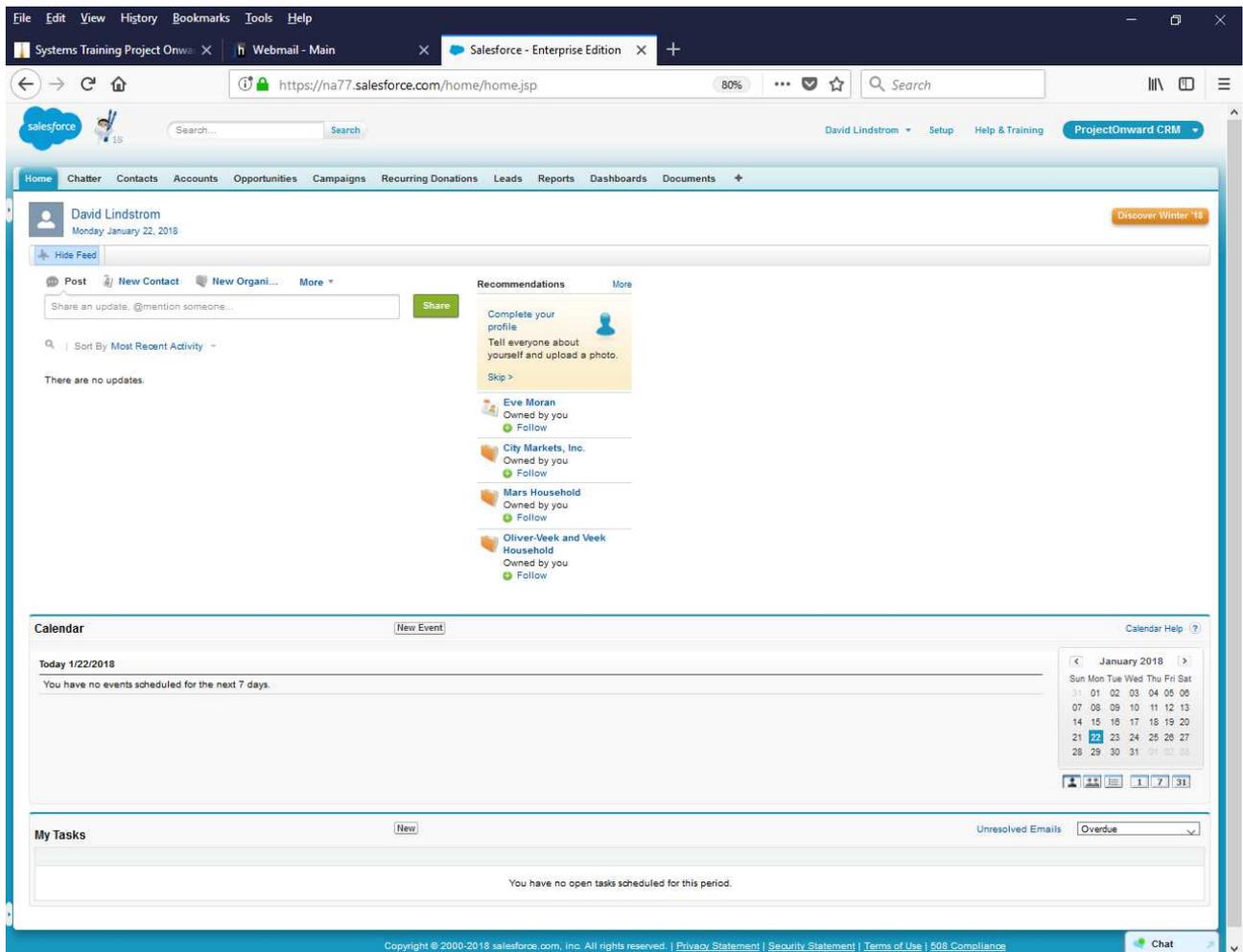
All Tabs

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.



Note: you can change the tabs that appear in your menu in your profile. (See the “My Settings” section, earlier).

3.2.5 Home Page has four main sections



Search, Menu and Links – (in light-blue area, across the top of the screen) – At Project Onward, we use this top area the most. We will look further at this in the following sections.

Your Feed – (top one-third of screen) – This section works much like Facebook, letting you communicate with others in your organization and/or others in the worldwide community of organizations using Salesforce. This includes the community using Salesforce in nonprofits.

Calendar – (middle of screen) – This works like Google calendar and may be used by just yourself, and/or your organization.

My Tasks – (lower one-third of screen) - In organizations making full use of Salesforce, this is a powerful area where tasks around developing relationships with Donors and Prospective Donors may be divided between team members, each with different responsibilities. These tasks are related to processes defined by the organization. **At Project Onward, we have yet to use Salesforce for processes and tasks.**

Note that Project Onward uses Salesforce “Classic.” The screens in many Salesforce videos are from the newer, “Lightning” interface and looks somewhat different. But they have basically the same functionality.

3.2.6 Searching – Always Search first



As shown above, the **Search field** (circled in red) and **Menu** at the top of the screen are what you will use the most. Salesforce Search is very fast. It is always a good idea to search first. You can search on anything.

Search TIPS:

It doesn't matter whether you are trying to find an Account, a Contact, an Opportunity.

Always search first. (It is usually the quickest way to get to where you want).

Don't worry about capitalization.

Search on a Last Name and/or a First Name. Example: lindstrom or david

Search on an email or part of an email

Search on an address, or part of an address (even just a house number)

Search on a phone number (or part of one)

Search on a zip code

Just start typing letters of the name – a drop-down of possible matches appears

You can search on part of a name. **ESPECIALLY GOOD WHEN YOU SUSPECT MISSPELLING OR MULTIPLE, DUPLICATE RECORDS** - Example: sch* or shn*d*

In the above picture, I will click on the Contact record (red arrow, above).

Note that the icons will help (or confuse). The red arrow (above) points to the Contact record for David Lindstrom (which is what we want). The blue head icon, above it, is for Chatter (communicating with the larger community – NOT HELPFUL).