# 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 drivethrough). 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:

**Products Overview** 

Pricing

SELL FASTER AND SMARTER

Salesforce Lightning Help reps set the way they want, faster

LEARN HOW Y

Meet Salesforce Einstein Introducing artificial Intelligence for everyone in your builitest.

LEARN MORE >

**Discover Trailhead** The furt way to learn Salesforce.

LEARN FOR FREE >

SALES

Sales Cloud Seles force automation and CRM Salesforce CPO Configure, price, quote (CPQ) and Desk.com billing automation

Data.com 828 princecting and data cleansing

INDUSTRIES

Financial Services Cloud ORM for banking, Insurance, wealth management, and more

Health Cloud CRM for managing petient relationships

COMMERCE Commerce Cloud Digital commerce, point of sale, and under management

SERVICE

desk

bushets

Service Cloud Fully customizable support and help Digital marketing platform

Al-In-one-customer support for small

ANALYTICS Einstein Analytics

Bushess analytics on any data, any Salesforce Platform dentce

COMMUNITY Community Cloud Connect customers, partners, and

employeet Chatter

Enterprise social network

PRODUCTIVITY Oulp Collaborative documents, spreadsheets, and checklists. MARKETING

Marketing Cloud

Pardot 628 marketing automation

Salesforce DMP Data management platfo

PLATFORM AND APPS

The will platform as a service

AppExchange App, component, and consultant marketclaca

Lightning Ughtning apps for everyone

Heroku Enterprise Scalable apps for dava

INTERNET OF THINGS Salesforce IoT Platform to connect the Internet of things with your CRM

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#### 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! <u>Constituent</u> 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 venders 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





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	<b>Contact</b> – A person of interest, associated with a Household and possibly affiliated with a company or organization.
Opportunity	<b>Opportunity</b> – 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	<b>Campaign</b> – 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

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di Ross	nerrie Indstr@armeritech.net	Watch Demo	1
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In your web browser, go to: <u>http://salesforce.com</u>. 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

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salesforce	18	Ċ	Search		Search			David Li	ndstrom	• Setu	p Help & Training	0	ProjectOnward NPS	SP 🔹
Home A	lccounts	Contacts	Leads	Opportunities	Campaigns	Reports	Recurring Donations	Contact Merge	NPSP	Settings	Getting Started	>	ProjectOnward CRM Sales Service	
salesforce Welco	nonpr succes pack	ofit o <mark>Sale</mark>	esfor	ce and th	ne Non	orofit	Success Pa	ck (NPSP	?)!				Marketing Nonprofit Settings Salesforce Chatter Batch Data Entry Power of Us Hub	
You now hav	ve access to	o ALL the p	owerful fea d	tures of Salesforce	e Enterprise Edi	ition PLUS	the ability to better manag	e donors with the No	onprofit S	uccess P	ack application. Now	let':	AppExchange Developer Community Success Community	ty

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

David Lindstrom 💌	Setup Help & Training	ProjectOnward CRM 🔹

**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

	David Lindstrom 🔹	Setup	Help & Training	ProjectOnward CRM 🔹
Rep	My Profile My Settings	cuments	+	
	Developer Console Logout			Discover Winter '18

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).

Quick Find	Helio, David Lindstrom!
My Settings	Personal Setup is now My Settings Now all your personal setup options are right here on the My Settings page—with a new organization to make them easier to find and manage.
Change My Password Language & Time Zone Grant Account Loger Access	Looking for App & Administration Setup?
Ny Groups Resul Ny Security Token Connections Login History Approval Sattings	Quick Links           Change my password           Persond > Change My Password           Change My Password
Advanced User Details. Authentication Settings for External Systems	Edit my personal information Personal > Personal information Customize my tabs Desplay & Layout > Customize My Tabs
丽 Display & Layout 昭 Email	Desktop Add-Ons
C Chatter	Salesforce for Outlook Chatter Desktop Bowsload Now Contracts werts and tasks Our locater Chatter dealdop offering built on

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)

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Vern: New Last Wesk Recent Contacts Name	v Gat	Editi Create New V	New Nobile	Email		Wailing Street		Mailing C
View: New Last Week Recent Contacts Name Lindstrom, David		Edit i Create New V Phone (773) 612-7158	New Nobile (773) 642-7158	fmeil dareiliteroildere com		Mailing Street 2014 S. Hamilton		Mažing C Chicago

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.

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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.

View: All Table	
About Batch Data Entry	🤝 Home
About Nonprofit Starter Packages	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Accounts	💡 Ideas
Addresses	🤾 Leads
Affiliations	🗲 Macros
Affiliations Settings	🤌 NPSP Data Imports
App Launcher	> NPSP Settings
Batch Data Entry	Opportunities
Batch Data Entry	Deportunity Rollups
Batch Data Entry Settings	C Payment Mapping
Campaigns Tell me more!	Paymenta
Cases	2 People
C Chatter	Price Books

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

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David Lindstrom     Monday January 22, 2018			Discover Winter 18
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Post Wew Contact Wew Organi More *	Recommendations More		
Q   Sort By Most Recent Activity ~	profile Tell everyone about yourself and upload a photo.		
There are no updates.	Skip > Eve Moran Owned by you		
	Follow     City Markets, Inc.     Owned by you     Enlow		
	Wars Household Owned by you Ø Follow		
	Oliver-Veek and Veek Household Owned by you Sollow		
Calendar	New Event		Calendar Help 👔
T 4/92/904/0			lanuary 2018
You have no events scheduled for the next 7 days.			Sun Mon Tue Wed Thu Fri Sat 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
Ny Tasks	New	Unreso	Ived Emails Overdue
	You have no open tasks scheduled for th	s period.	

**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, "Lightening" interface and looks somewhat different. But they have basically the same functionality.



As shown above, the **Search field** (circled in **red**) and **Menu** at the top of the screen are what your 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 trying to find and 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 MIS-SPELLING 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).