

Salesforce *for* Nonprofits

What's changing & why it matters





BEFORE WE BEGIN

Housekeeping

- ? **Questions** → Drop them in the **Q&A box** at any time.
- 💬 **Chat** → Watch for **helpful links**, **quick polls** and **casual conversation**.
- 🎉 **Reactions** → Show us how you feel. We love seeing your engagement!
- 📊 **Polls** → We'll launch a few during the session — jump in when they appear.
- 🔄 **Replay** → You'll get the **recording** after the webinar.
- 🤝 **Community** → Please help us keep this a safe, respectful space for everyone by engaging with kindness and care.

Give Lively introduction



Free for nonprofits

Give Lively does not charge nonprofits for use of our platform.



Values-driven

Our platform supports nonprofits that make the world a better place.



Secure & transparent

We feel strongly about privacy, security and transparency. At every level of what we do.



Speedy & frictionless

We offer streamlined payment forms and quick, seamless donation disbursement.



TODAY'S PANEL

Introductions



HOST

Mike Spadaro

Lead, Acquisition & Partnerships

Give Lively



CO-HOST

Jada Moore

Senior Solutions Architect

Give Lively



SPEAKER

Jonathan Lin

Product Manager, Business Applications & Implementations

Give Lively



GUEST SPEAKER

Michael Kolodner

Nonprofit Salesforce Consultant

Free Like a Puppy

AUDIENCE

Who this session is for



Nonprofits **using** Salesforce



Nonprofits **curious about** Salesforce



Nonprofits **evaluating** CRM options



LIVE POLL

How would you describe the current state of your Salesforce journey?

01 Using Salesforce

02 Planning implementation

03 Evaluating options

04 Not using Salesforce

SETTING THE STAGE

What is Salesforce?



Cloud-based CRM

A customer relationship management platform that lives entirely in the cloud — no servers to maintain



Manages donor data + relationships

Tracks who gives, how often, why and what comes next — the connective tissue of modern fundraising

Nonprofits on Salesforce



Founding of Salesforce
Introduction of 1-1-1 model

1999

2008



Public launch of NPSP

2009

88%
say Salesforce has improved ability to achieve mission

34K+
customers:
nonprofits
& education



Community develops nonprofit solutions
Work begins on the Nonprofit Starter Pack (NPSP)



Launch of Nonprofit Cloud (based on Industries model)

2023

WHY IT CAUGHT ON

Why nonprofits choose Salesforce

01

Price

10 free licenses, discounts

02

Size

Market leader, large ecosystem, integrations

03

Complexity & customization

Nearly endless capabilities



Bonus

Native Give Lively integration



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IN PRACTICE

Why nonprofits choose Salesforce



Fundraising + donors



Program management



Campaigns + events



Grants management



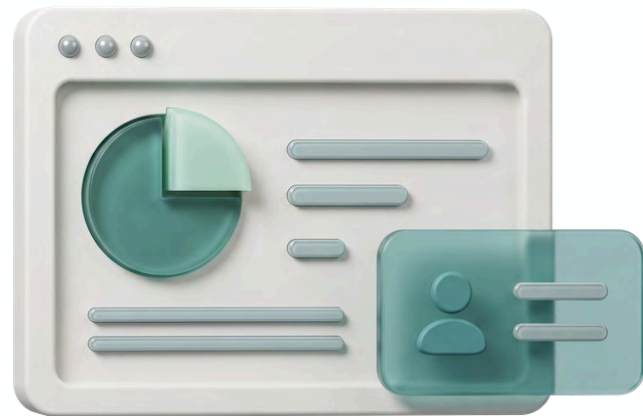
Volunteer management



Marketing & engagement

Three paths: different solutions for different needs

PATH 1



NPSP (existing)

The established solution many nonprofits use today.

PATH 2



Nonprofit Cloud / Agentforce

The **NEW** product Salesforce has developed.

PATH 3

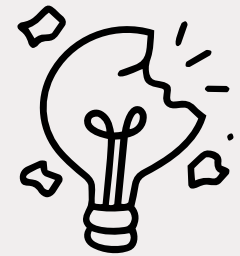


Alternatives (NPA, NPP)

Other paths to consider based on organizational needs.

WHAT THIS MEANS

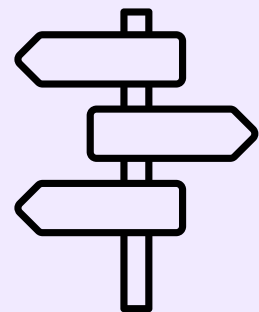
The landscape is shifting & strategy matters more than ever



OLD THINKING

IN THE PAST

- ⊗ One-size-fits-all solution
- ⊗ Pick Salesforce and you're set



NEW THINKING

TODAY & MOVING FORWARD

- ✓ Multiple paths to consider
- ✓ Decisions are required
- ✓ Strategy matters more than tools

IF YOU'RE ALREADY USING SALESFORCE

A thoughtful approach helps navigate what's changing & plan with confidence

1



Understand what's changing

- NPSF feature updates are ending.
- Salesforce is introducing new solutions.
- Change impacts timelines, support and roadmap.

2



Evaluate migration considerations

- Review timelines and migration paths.
- Assess data, customizations and integrations.
- Plan for training, change management and adoption.

3



Ask the right questions

- What solution best fits your needs now and in the future?
- What's the total cost of ownership?
- What resources will we need internally or from partners?

4



Plan your next steps

- Build a clear plan and timeline.
- Engage the right stakeholders and experts.
- Make informed decisions with confidence.

IF YOU'RE ALREADY USING SALESFORCE

A thoughtful approach helps navigate what's changing & plan with confidence

1



Needs

- What problems are you trying to solve?
- What are your must-have capabilities?
- What are your nice-to-have features?

2



Budget

- What is your budget for implementation and ongoing costs?
- What resources do you have internally?
- What is the total cost of ownership over time?

3



Complexity

- How complex are your processes and data?
- How customized will you need to be?
- What level of reporting and integration do you require?

4



Alternatives

- Is NPSP (Nonprofit Success Pack) sufficient today?
- Would an alternative solution meet your needs?
- Are you ready for a more advanced platform?

PRACTICAL NEXT STEPS

Take action today to move forward with confidence



Explore your options

- Understand the landscape and what's possible.
- Compare solutions that fit your needs and resources.
- Use a phased approach. You don't need everything today.



Talk to your team (and an expert)

- Align on goals, priorities and realistic timelines.
- Ask questions and get expert guidance.
- Make sure everyone is informed and on board.



Choose what fits now

- Select the solution that meets your needs **today**.
- Plan for how you can grow and adapt over time.
- Take the first step; progress starts with a decision.



You don't have to figure it all out today.

Take the next right step for your organization. We're here to help.



WHERE GIVE LIVELY FITS

We help connect your fundraising to your CRM to power your mission



Fundraising
Give Lively



Online giving and payments



Donor engagement and retention



Campaigns, events and peer-to-peer



**NATIVE
INTEGRATION**



CRM
Salesforce



Donor records and relationships



Programs and case management



Reporting and insights



Free platform

Free fundraising products
and features for nonprofits



Native integration

Seamless, secure direct
connection with Salesforce



Simplified data flow

Save time, reduce errors and
focus on impact

FOR CONTINUED LEARNING

Two resources on Salesforce

Give Lively Salesforce help center

Access setup walkthroughs, sync diagnostics and direct email support from the GiveLively team to guide your Salesforce integration.

<https://www.givelively.org/contact-us/create-a-salesforce-help-ticket>



Free Like a Puppy

Read independent articles and practical insights from Salesforce *Most Valuable Professional (MVP)* Michael Kolodner on implementing Salesforce for nonprofits.

freelikeapuppy.tech



Q&A



Questions → Drop them in the Q&A box.
We'll answer as many as we can.

In closing

Thank you for joining us! 🌟

Attend a live or on-demand platform demo

See how Give Lively's free fundraising products can power your campaigns.

Join Give Lively Grow

Receive one-on-one strategy sessions, practical tools and guidance to level up your fundraising and meet your goals.

Sign up for our Breakthrough newsletter

Receive timely advice, actionable resources, nonprofit wisdom and fundraising product updates.

Stay connected

Follow us on socials for tips, webinars and nonprofit success stories.





Thank you!

