The Silent ROI Gap

Surfacing hidden revenue inside Salesforce – and the patterns that flip your system from a cost center into a growth engine.

By **Tanya Renne, Founder & CEO** and the Orchid Connect team

A field report for executives, operations leaders, and membership directors at associations, nonprofits, and organizations running Salesforce or Fonteva.

The 10–20% Problem

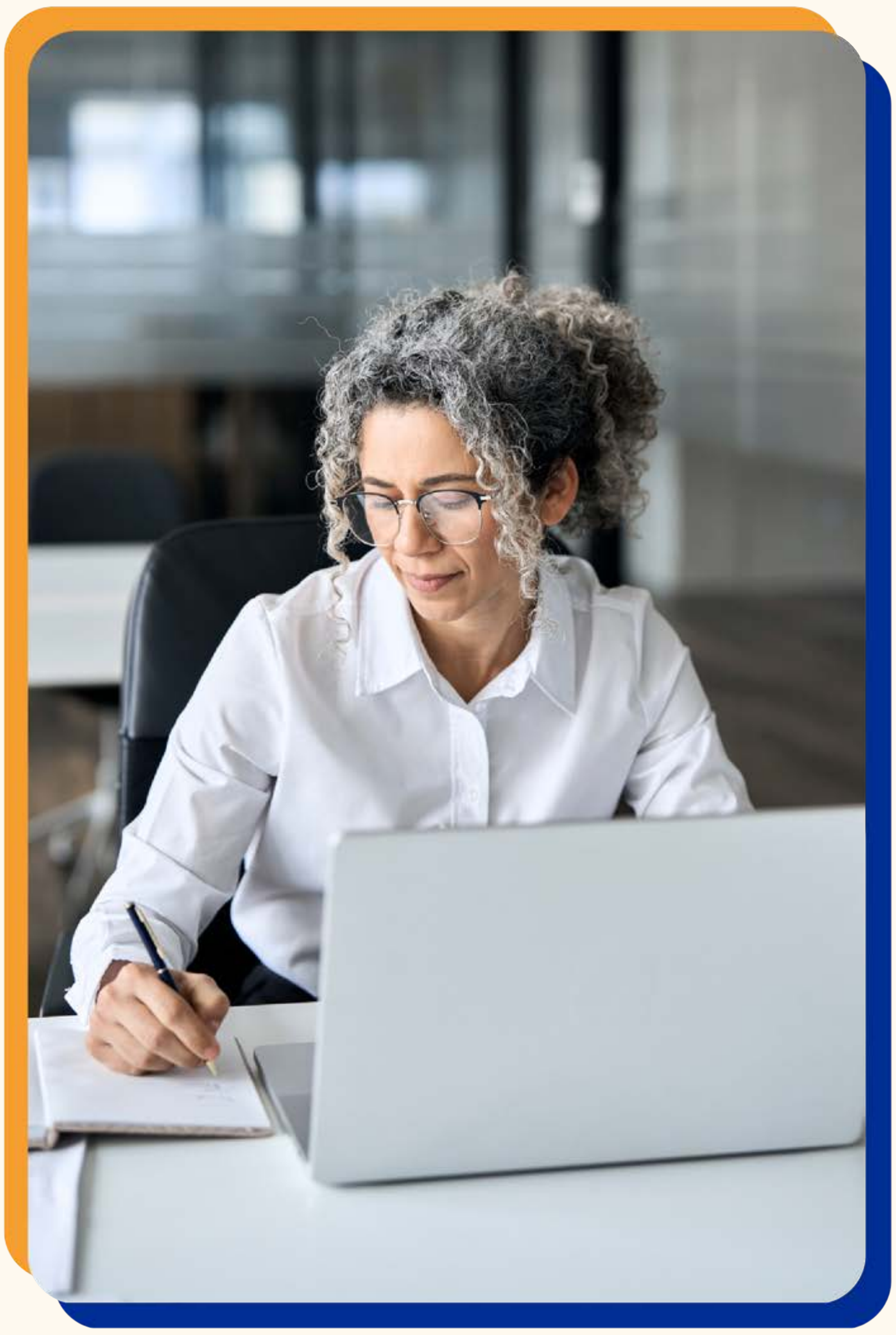
After three decades implementing technology for associations and nonprofits, our observation is consistent: nearly every Salesforce environment we walk into is underperforming. Just not in the same way.

For some organizations, the gap shows up as underuse. Salesforce is treated like a glorified CRM. The platform sits at 10–20% of its real capability, and the organization has no idea how much it's leaving on the table.

For others, the gap shows up as leakage. The platform is used heavily, paid for generously, and is still losing revenue through workarounds, stalled renewals, unreliable reports– and sacred processes nobody can touch.

Different shapes. Same gap. Same opportunity to recover real revenue from a system you've already bought and invested time into.

The software is fine. Its implementation almost never is– and almost always, that's fixable.



The gap between what Salesforce could be doing for an association and what it's actually doing rarely shows up on a dashboard.

It shows up in:

- The hours your team spends working around the system.
- In members and chapters who call the office instead of self-serving.
- In data no one fully trusts.
- In renewals, adoption, and retention leaking out in quiet increments.

We call this the Silent ROI Gap.

What We've Learned Over 3 Decades

This report is about about the ROI gap in Salesforce, and how your organization can overcome it.

Five recurring problems we see in nearly every environment we walk into- what each one looks like on the ground, why it happens, and what the top-performing associations do differently.

> **Everybody we talk to is miserable. And they expect to be miserable**
>
> **They'd like to be a little less miserable- and that's really what we're here for.**
>
> Tanya Renne
> **Founder & CEO, Orchid Connect**

Who Sees the Problem and Who Doesn’t

Association Salesforce environments underperform in one of two ways, and this determines who can see the problem.

01. The Leadership Blind Spot

Leadership sees the system they paid for, the implementation they approved, the renewal numbers that roll up to the board. From the top, things look fine. Or at least fine enough. Reports arrive on time, mostly. The team doesn’t complain, much. Training was delivered, more or less.

What leadership often doesn’t see is the informal work happening underneath. Staff who discovered the system didn’t accommodate their real process quietly built spreadsheets to fill the gaps. Someone on the membership team is manually reconciling data between systems because they never integrated cleanly. Finance keeps a parallel record because the reporting they need doesn’t exist in the new platform.

None of this is visible from a leadership seat. All of it is eroding the system’s value.

02. The Staff Workaround

The people using the system every day can see exactly what’s broken. They’re running the same reports across three tabs, re-keying data between systems, and fielding member calls the portal could have handled.

What they often don’t have is the authority or the language to surface these issues as strategic problems rather than individual frustrations.

The gap between what leadership believes about the system and what staff experience is the first diagnostic signal. When that gap exists, the five problems outlined on the next page are almost always present.

> **People still work outside of the systems.**
>
> **They’re using spreadsheets for business processes that were never accommodated, or that they didn’t understand entirely.**
>
> **Nolan Burke**
> **Director of PMO, Orchid Connect**

The 5 Problems We See Everywhere

01. Low staff adoption

The system is available, but work continues in spreadsheets, shared drives, or relies on the knowledge of a single long-term employee.

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02. Weak member engagement

Members contact the office for tasks the portal is designed to manage, resulting in unnecessary use of staff time.

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03. Data no one fully trusts

The same question gets three different answers depending on who generates a report, leading to decisions based on intuition rather than consistent, reliable information.

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04. A platform used at a fraction of its capability

Only 10–20% of Salesforce's capabilities are in use, while the remaining features go unused. Much of this potential remains unrecognized until it's demonstrated.

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05. Operational bottlenecks that slow everything down

Processes depend on a single individual, creating delays that collectively slow overall operations.

01. Low Staff Adoption

What it looks like

Staff were given a login, trained for a few sessions, and left to figure out the rest. Many of them didn’t.

They reverted to the tools they knew (spreadsheets, shared drives, mental notes, the veteran colleague down the hall), and the system became a place where data is stored, not a place where work actually happens.

→ Watch for

Critical work is happening in spreadsheets, shared docs, and email threads outside the system.

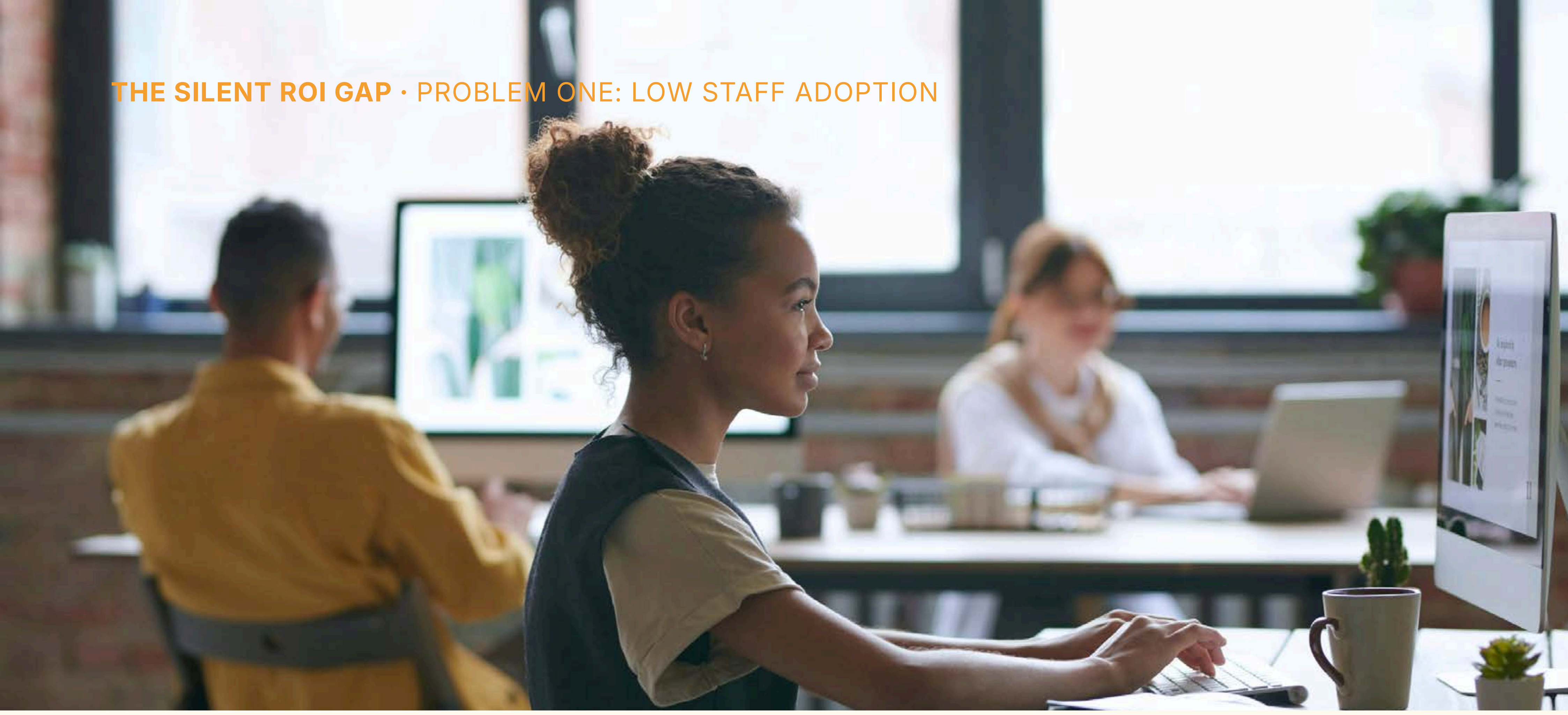
If staff track renewals, sponsorships, rosters, or engagement in parallel tools, each of those is a process the platform was supposed to accommodate and didn’t.

→ Watch for

Your team can’t fully explain processes they’ve been running for twenty years.

Ask a veteran team member to walk you through renewals end to end, without notes. If they trail off or say “it depends,” the process has become tacit knowledge instead of a documented workflow.

That makes it impossible to optimize, train on, or transfer when someone leaves.



Why it happens

Adoption fails for two related reasons. The first is that the implementation focused on tasks instead of outcomes (what fields do you need, what reports do you need), which produces a system that technically works but doesn’t reflect how the team operates.

The second is that staff weren’t given enough oxygen during the implementation.

Training is not adoption. Staff need to be consulted on their workflows and given time to learn the system in the context of their real work. Skip that step and they revert to manual workarounds.

What high-performing associations do differently

They start with thorough discovery that gives every staff member a real voice, not just the leadership team. When a deep-tenure team member gets to walk a room through what they actually do all day, two things happen: leadership finally sees the work, and the staff member becomes a champion for the new system instead of a skeptic.

That one step of hearing and valuing the people who will use the system predicts adoption more reliably than any amount of post-launch training.

02. Weak Member Engagement

What it looks like

Members call the office for routine things. Renewal changes, roster updates, chapter officer transitions, event registrations, document requests.

Staff pick up the phone, do the task manually, hang up, repeat. The portal has no member personalization, and enables visitors do a fraction of what they actually need to do.

→ Watch for

Members, volunteers, and chapters can't self-serve. Routine tasks that should happen in a portal are happening on the phone, in email, or through staff intermediaries. Every one of those interactions is a staff hour that shouldn't be spent there and a member experience that feels dated.

Why it happens

Most associations underestimate what their platform can deliver to members. Salesforce can support deep, personalized self-service across members, chapters, sponsors, volunteers, and affiliates.

Implementations rarely push this far.

The default deployment gives members a login and a few read-only screens.

The capability to let members manage their own events, update their own rosters, run their own chapters, and see themselves in relation to the organization sits unused because nobody budgeted for it, and nobody realized it was possible.

What high-performing associations do differently

They treat the member portal as a revenue center instead of cost center.

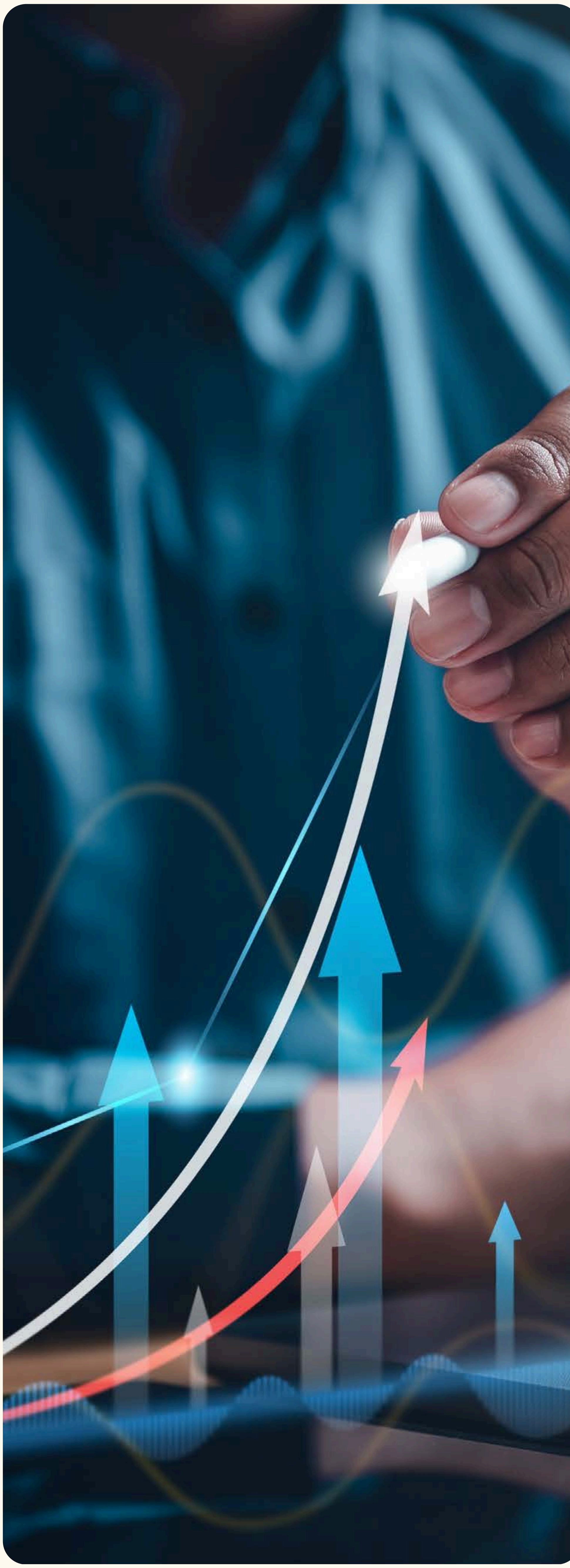
One association we work with is rolling out seven different portal experiences (for members, sponsors, students, and affiliates) and estimates it will retain or grow revenue by roughly a million dollars in the first year alone.

We helped them surface a different question than most associations ask.

Most ask:
How do we reduce support calls?

We ask:
How do we give members enough value that they pay us more?

> “
> **When members spend more money with your organization, it’s because they’re getting more value.**
>
> **Show them more value, and they will spend more with you.**
>
> Tanya Renne
> Founder & CEO, Orchid Connect



03. Data No One Fully Trusts

What it looks like

Leadership asks for a number. Three different people pull it three different ways and get three different answers. The membership team runs one report, finance runs another, marketing has its own version in a separate spreadsheet.

None of them are obviously wrong. None of them quite match.

Over time, the organization develops a quiet consensus that the data isn't fully reliable, and decisions veer towards being made on gut feel instead.

→ Watch for

Reports take multiple people, multiple hours, or both, to produce.

A healthy system lets the person who needs a number pull it themselves. An underperforming one concentrates reporting in one or two staff who become bottlenecks for everyone else.

→ Watch for

Your data was imported intact, baggage and all. Duplicate records, inconsistent naming conventions, stale contacts, incomplete histories, fields no one can remember why they exist.

If the migration was a data dump rather than a data strategy, the new system inherited everything that was wrong with the old one.

What it looks like

Pattern 1

The old system was imported intact, which means every inconsistency, duplicate, and workaround from the legacy environment now lives in Salesforce.

Pattern 2

The more subtle issue is the organization's relationship with data itself. Associations tend to hoard.

They keep every record they've ever collected, including data that hasn't been touched in a decade, because letting go feels risky.

The result is a system that's technically complete and practically untrustworthy.

What high-performing associations do differently

They make data strategy an explicit part of the implementation, not a post-launch afterthought.

They decide upfront which data is active, which is archival, and which is simply noise.

They build reporting that multiple people can own, so finance doesn't need to ping the database admin every time leadership asks a question.

And they accept a harder truth: cleaning data isn't glamorous, but it's usually the single highest leverage investment an association can make in their system's performance.

> **They usually think that it's the old systems that are the problem.**
>
> **What it really is, is their relationship with data.**
>
> **Nolan Burke**
> **Director of PMO, Orchid Connect**

04. A Platform Used at a Fraction of Its Capability

What it looks like

Your organization pays for Salesforce. Yet it uses a narrow slice of what Salesforce does. Standard contact management, basic reporting, a handful of dashboards, and maybe one integration.

The rest – partner portals, advanced automation, self-service for chapters, sophisticated member segmentation, workflow orchestration across departments – sit idle because the initial implementation was narrow and no one has revisited it since.

→ Watch for

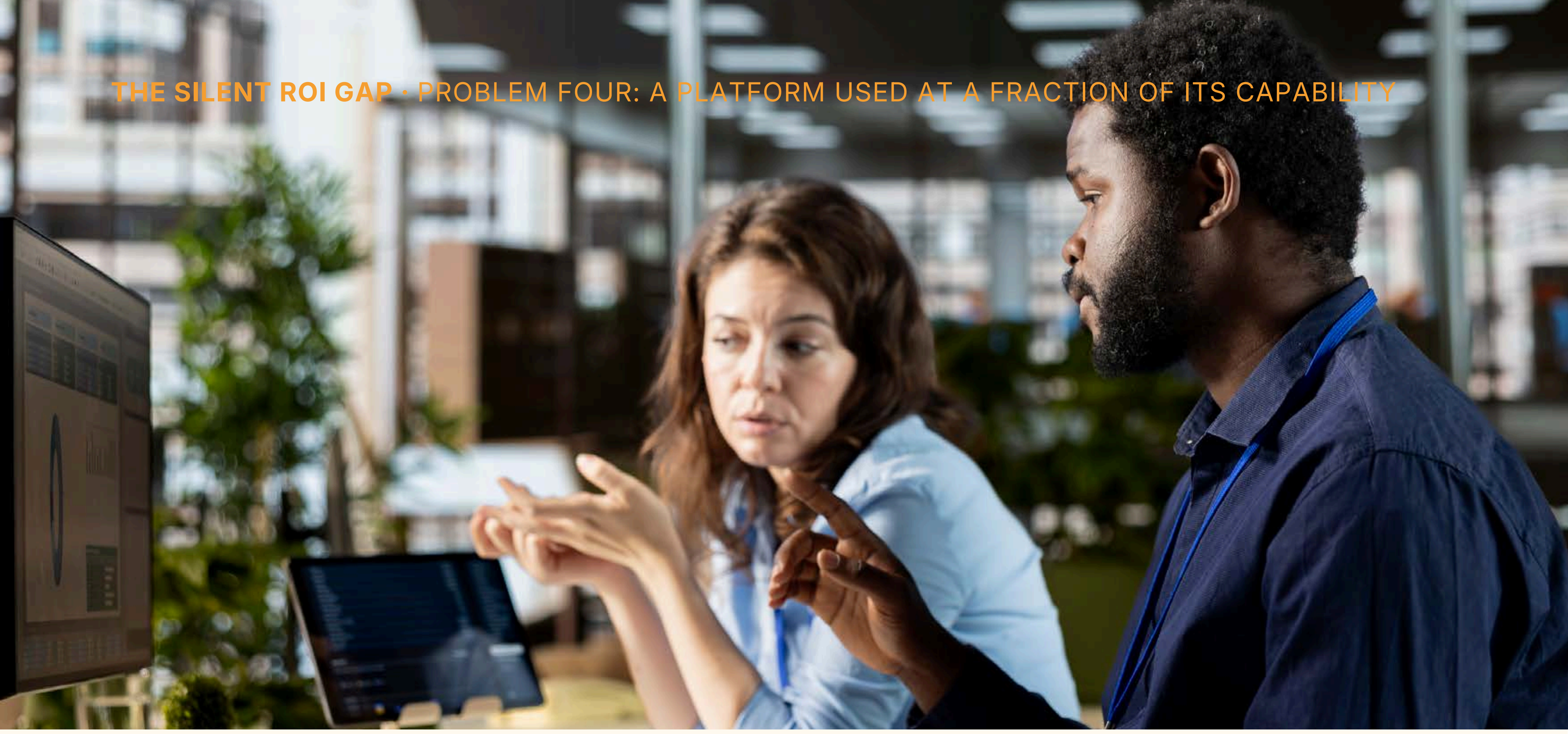
You're using 10–20% of what the platform can do. Most associations have paid for capabilities they don't know they have. Salesforce is one of the most feature-rich platforms in the world.

Because it's dense and first implementations are typically narrow, organizations rarely use more than a small fraction of what's available.

→ Watch for

Every small change requires a developer or a purchase order. A well-implemented Salesforce environment should be owned and managed by the organization.

If adding a field, updating a report, or modifying a workflow requires hiring a consultant each time, the implementation was built to maintain the vendor relationship rather than serve the client.



Why it happens

Most associations approach their technology as a cost center. The system was implemented to do a specific job, the job is being done, no one is actively asking what more it could do.

Combined with the fact that many implementations are delivered by vendors who benefit from the organization's ongoing dependence on them, the result is a platform that's technically live but strategically dormant.

What high-performing associations do differently

They treat their platform as a revenue engine. They ask:

- Where is revenue leaking because the system isn't supporting it?
- Which renewals are we losing because the member experience is weak?
- Which corporate partners would spend more if we could show them their engagement in real time?

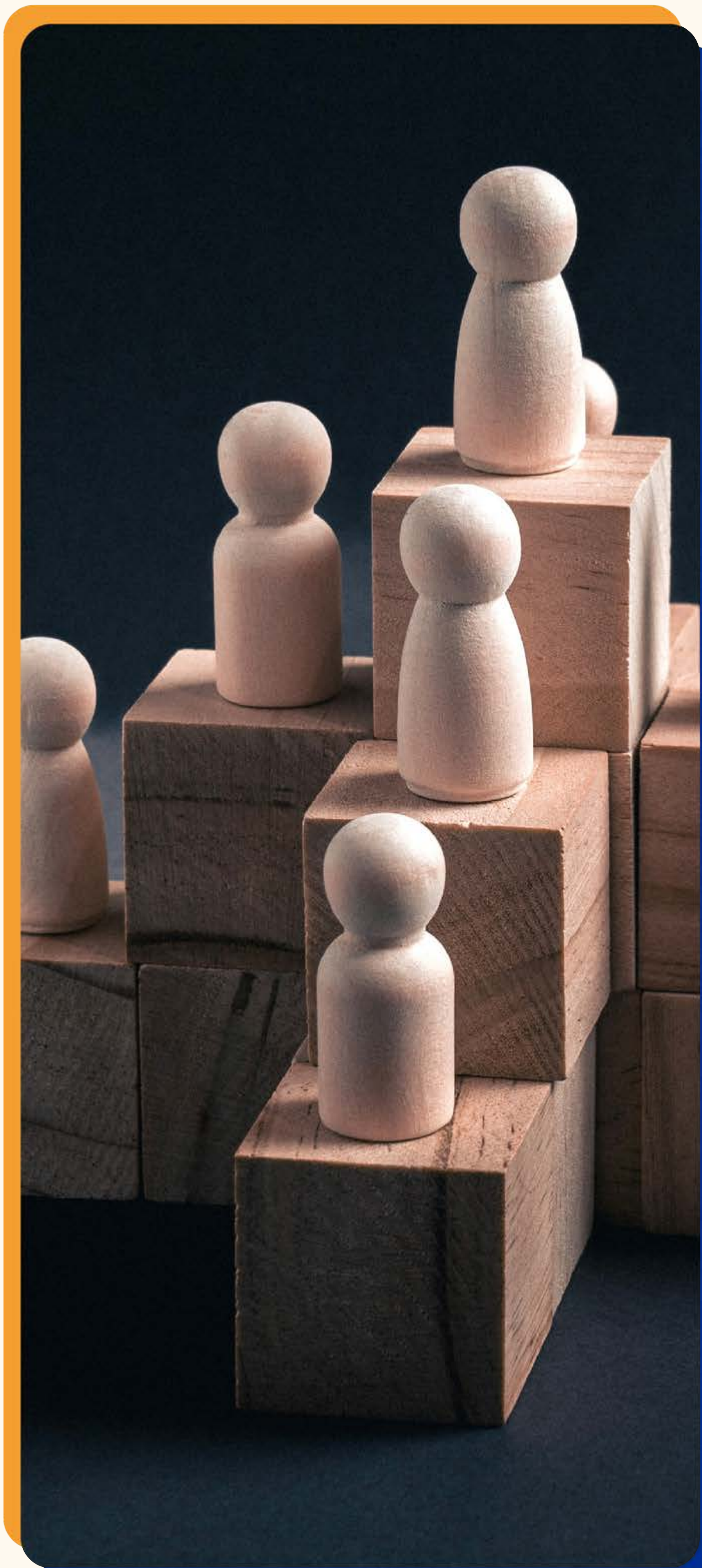
When the system is framed as a revenue engine, the ROI math on activating unused capability becomes obvious. The work stops feeling like technology spend and starts feeling like investment.

05. Operational Bottlenecks That Slow Everything Down

What it looks like

Every process has a person it has to go through. Reports route through one admin. Data changes route through one IT resource. Vendor approvals route through leadership. Chapter updates route through the membership team.

Each of these bottlenecks is tolerable on its own. Together, they add up to a system that moves at the speed of its slowest human.



> “
> **The real challenge is figuring out which “sacred” processes actually drive value, and which ones just *feel* sacred because we’re used to them.**
>
> Tanya Renne
> Founder & CEO, Orchid Connect

→ Watch for

You have sacred processes that feel too unique to touch.

Every association has a list of processes that feel too specific, too important, or too politically charged to change. They accumulate over time, and they're almost always the source of the most expensive customizations.

Real progress starts when leadership is honest about which of those processes actually drive value and which just feel sacred because they've always been there.

Why it happens

Bottlenecks form quietly. A system goes live, one person becomes the person who knows how to do a thing, that person keeps doing it, and over time the organization forgets it doesn't have to be that way.

The software could let anyone run that report. The workflow could trigger automatically. The approval could be built in.

None of these changes happen unless someone explicitly revisits them, and in most associations, no one does.

What high-performing associations do differently

They build for reuse. Instead of solving each problem once for one team, they build reusable components that solve similar problems across the organization.

A signature workflow that works for one chapter can work for fifty. A self-service portal built for members can be extended to sponsors in weeks.

This product-minded approach is the single biggest determinant of how expensive the system will be to maintain in year three, year five, and year ten, and how many bottlenecks survive along the way.

How High-Performing Associations Think

Across the five problems, there’s a common pattern in how the best-performing associations think about their Salesforce deployments.

It’s not a single practice. It’s a posture.

They think in products, not projects.

The average implementation treats each request as a one-off: a new report, a new field, a new workflow The better approach treats the system as a product being extended over time.

Each new piece builds on what exists. Components are reusable. Decisions made for one department consider how they’ll serve the next.

This alone dramatically reduces the cost and timeline of every future change.

They accept that 80% of one size fits all.

Very few association processes are actually unique. Most are variations on patterns that dozens of other associations already run.

The top-performing deployments accept that 80% of their processes can employ reusable, well-tested patterns, and they reserve custom work for the 20% that is genuinely differentiated.

This posture saves years of technical debt.

They go out-of-the-box first.

Before customizing anything, they exhaust what the platform already does. This sounds obvious, but most associations don't work this way.

They come to Salesforce with a list of requirements from their old system and customize the new one to match. High-performing deployments flip this.

They start with what the platform already offers, let that shape the process, and customize only where the business case is genuinely specific.

They own the system. Their consultant is not a permanent resident.

The best implementations leave the client in control. Staff can manage their own records, build their own reports, and adjust their own workflows without calling a consultant.

This is a philosophical choice built into the implementation, not an afterthought.

The vendor's job is to make themselves unnecessary for the day-to-day.

> They've settled for doing manual things. If 80% of our system is in place, they just wing the last 20%. That creates a chunky experience for everyone.
>
> Gaps in renewals, gaps in adoption, and they lose money. It's the idea of inches everywhere.
>
> Little problems everywhere. Add them all up, it's a lot of revenue lost.
>
> **Tanya Renne**
> Founder & CEO, Orchid Connect

~6,000 members returned.

The technology wasn't the only reason, but it made it dramatically easier for them to come back.

The Problem

A national fraternity came to us with an underperforming Fonteva implementation.

- Their data was in bad shape.
- Their finance process was partially outside the system.
- Compliance requirements (significant in their industry) were being handled with paper forms and PDFs across three or four different tools.
- Leadership turnover, volunteer-led governance, and a skeptical operations team meant every change was political.

The implementation had technically gone live. The system wasn't delivering. Staff were miserable. Leadership was frustrated. The instinct to throw it all out and start over was strong.

Our Approach

Our approach was not to rebuild. It was to fix the pieces that mattered most, in the order they mattered.

- Renewals first.
- Then the certification process for new members.
- Then the event insurance compliance flow. Each built on reusable components.
- Each deployed in weeks, not quarters.

The outcomes were concrete.

Chapter leadership can now manage their own rosters, run their own reports, collect their own signatures, and track their own events, all without calling headquarters.

Compliance processes that used to live on paper now live in the system.

Since the work began, approximately 6,000 members have returned.

Why We Don't Do Scorecards

You may have noticed this report doesn't end with a quiz.

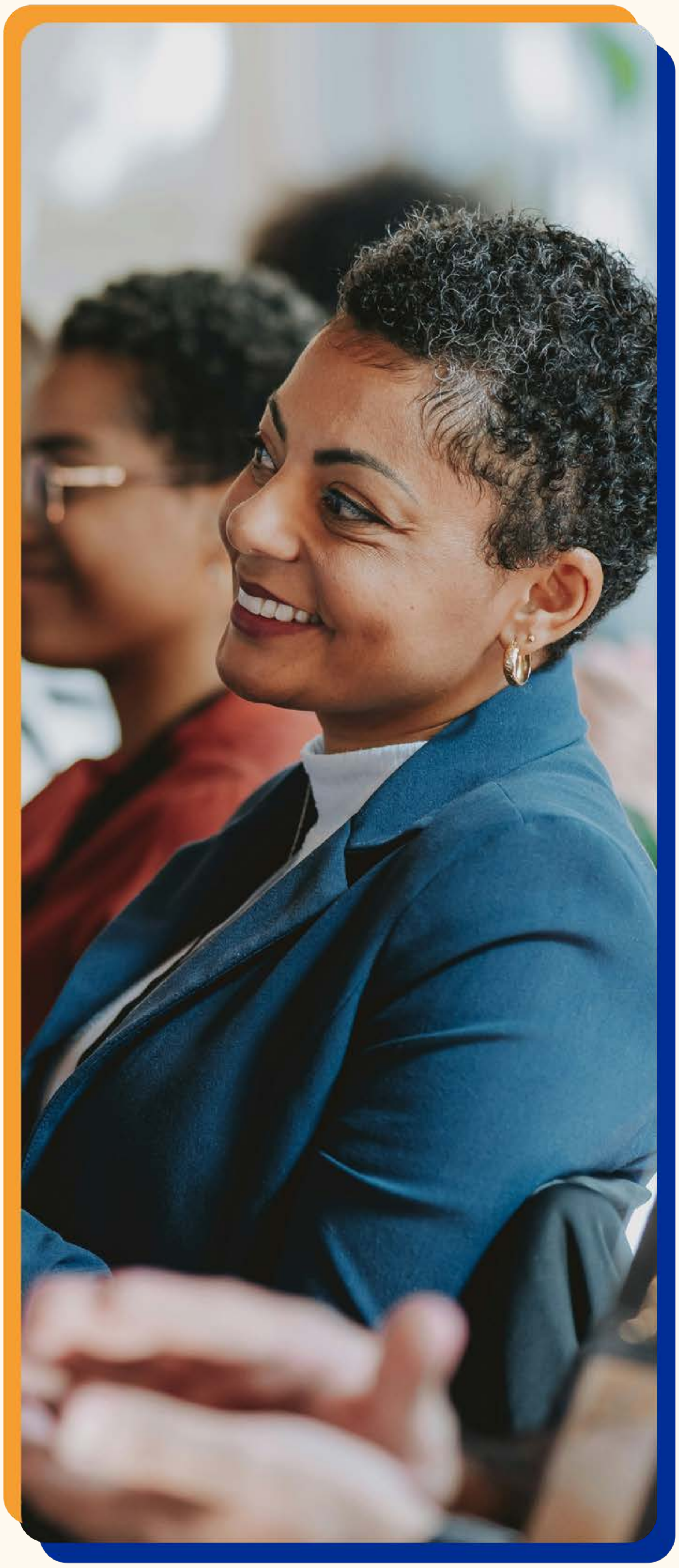
That's deliberate. Plenty of Salesforce partners will hand you a health check, a maturity assessment, or a tiered scorecard that produces a number.

We don't, because the variables that determine whether your system is underperforming aren't knowable from a form.

Your migration history. Your previous partner's decisions. Your team's politics around data. The specific way your AMS was layered in. Whether your finance team books revenue on the event date or the transaction date.

These shape your ROI gap far more than any self-reported rating.

> A score of 62 out of 100 could mean a solid foundation with two fixable gaps, or a catastrophic architecture masked by a few lucky wins.
>
> No questionnaire can tell the difference.



Every environment we walk into is genuinely its own situation. The only way to diagnose it is to look at it.

That's what the Salesforce ROI Roadmap is for.

Where to Start

If you've read this and recognized your environment in several of the five problems, the question becomes: what is this actually costing us, and what should we fix first?

That's what we answer in a 30-minute session we call the Salesforce ROI Roadmap.

The Roadmap is what you get after a 30 minute working session with our **Founder & CEO, Tanya Renne**.

We look at your current environment against what your association needs to deliver (stronger renewals, cleaner data, faster answers for leadership, deeper self-service for members and chapters) and identify the specific areas that are underperforming.

You leave with a prioritized roadmap of the initiatives that will move the needle, sequenced in the right order, with a clear view of effort and impact.

It's the same diagnostic we use with every client before we build anything.

Who this is for

The ROI Roadmap is most useful if you're running Salesforce or Fonteva at an association or nonprofit, ideally for at least 12 months, and seeing any of the following:

- Renewals, events, or member engagement you suspect are leaking revenue.
- A team that works around the system more than through it.
- Reports or data you don't fully trust.
- A platform you know you're underusing but can't quantify.
- A previous implementation or partner that didn't land where you needed it to.

It may not be a fit if you're pre-Salesforce or mid-RFP. The ROI Roadmap is built for environments that are already running.

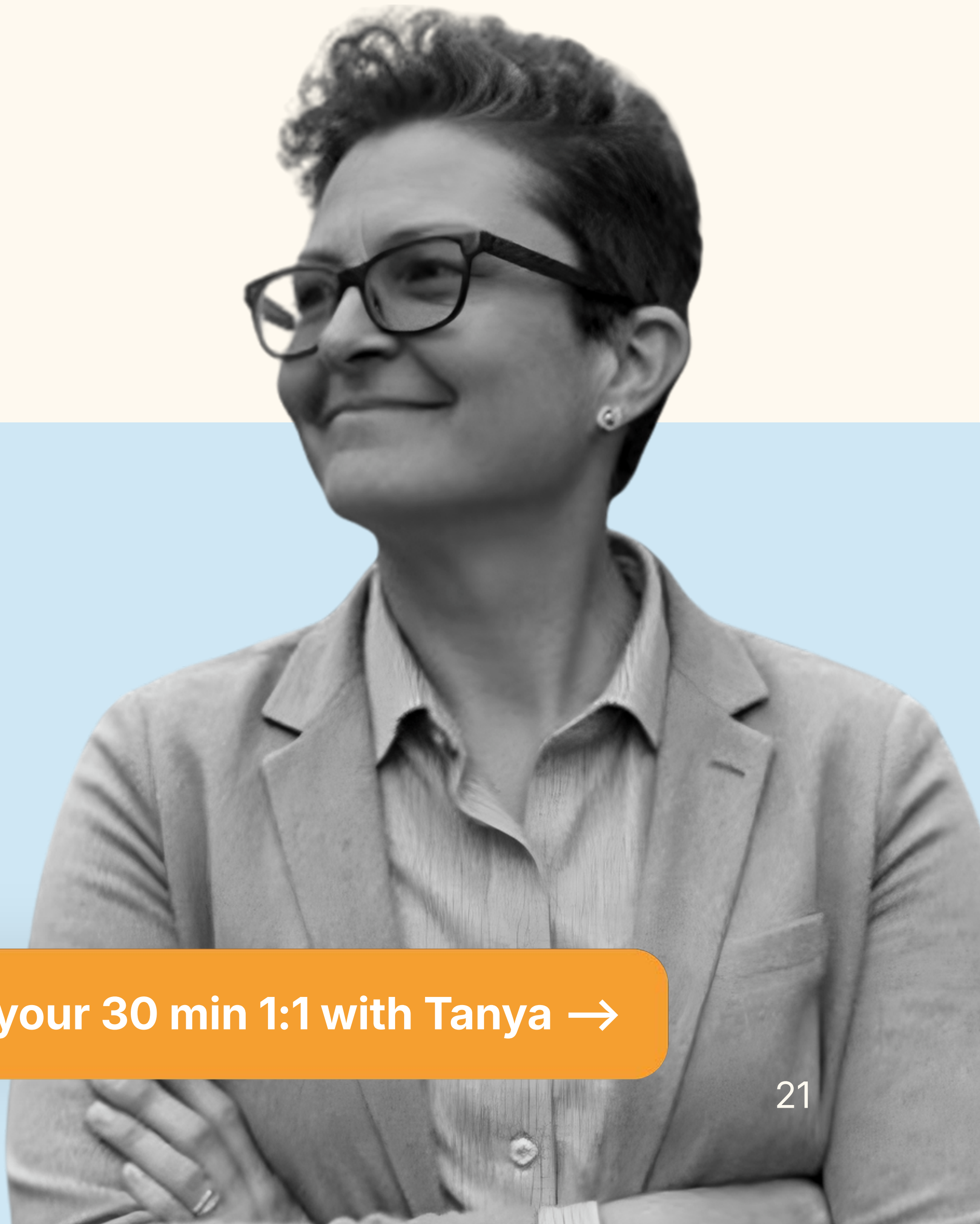
What happens in the session

You'll meet with Tanya 1:1.

She'll ask about where your system is today, where your association needs it to be, and what's in the way.

After the session, we'll put together a clear view of your biggest gaps, a prioritized list of what to address, and an honest read on effort versus impact for each.

No pressure to continue working with us. The roadmap is yours to keep.

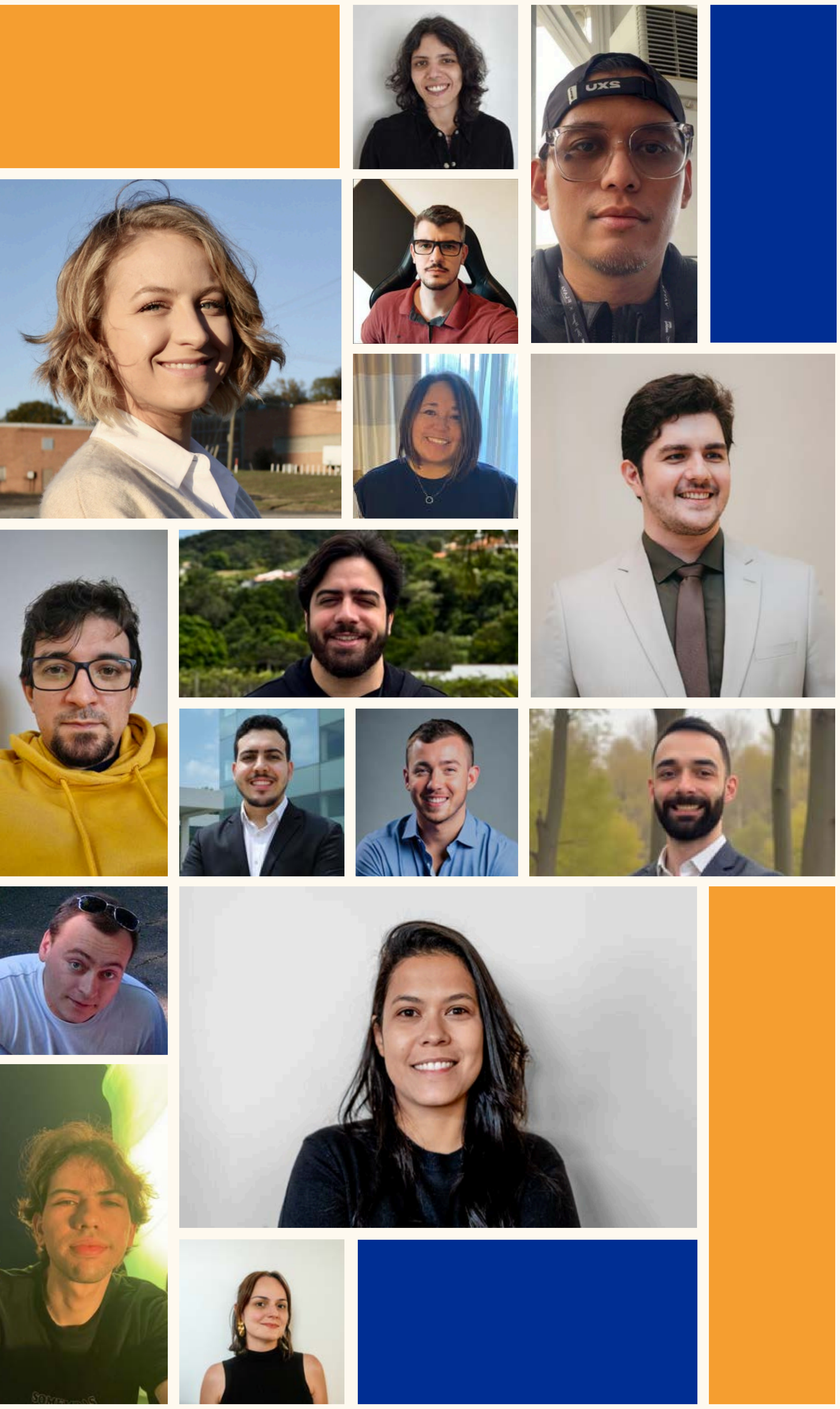


GET THE ROI ROADMAP

Find your biggest ROI gaps.

Unlock your revenue.

Book your 30 min 1:1 with Tanya →



About Orchid Connect

Orchid Connect is a Salesforce and Fonteva consulting firm that works exclusively with associations, nonprofits, and membership organizations.

Founded by Tanya Renne, Orchid is built on a simple belief: good implementations make clients more independent, not more dependent.

Our approach, drawn from over 30 years of experience, is The Orchid Way– reusable components, honest change management, and deep partnership with the people who use the system every day.

Solved. Simple.

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