ORCHID | salesforce PARTNER



ORCHID CONNECT · FOR NONPROFITS

The Silent ROI Gap

Why nonprofits underuse Salesforce, how to spot it in your org, and how to fix it.

Many nonprofit Salesforce environments underperform. Some run at 10-20% of what the platform can do. Others use it heavily and still lose funding through duplicate donor records, grant reports rebuilt by hand, and outcomes they can't show funders.

Salesforce can do far more than most nonprofits ask of it. The gap comes from how it was implemented, and that's fixable.

The 5 problems we see most

1

Records no one trusts

Duplicate donors, stale addresses, and gifts credited to the wrong household.

"Why did she get two appeals?"

2

One supporter, three records

Gifts, volunteer hours, and event attendance sit in separate places.

"Wait, she volunteers too?"

3

Grant reports built by hand

Every funder deadline means days rebuilding numbers from spreadsheets.

"Grant season eats our whole month."

4

Outcomes funders can't see

Program data counts activity, so the board asks what actually changed.

"We know it works. We can't prove it"

5

Volunteers run by email

Coordinators rebuild next month's schedule over email every week.

"Fridays are for the volunteer schedule."

Why it matters

Unused features still cost license fees and staff time

Nonprofits that see real value add programs and portals

Whoever runs Salesforce usually runs three other things too. When nobody owns the system, that's your first signal.

What top nonprofits do

> *"Every hour spent fighting the database is an hour taken from the mission."*
>
> **Tanya Renne**
> **Founder & CEO, Orchid Connect**

Clean up the screen

Remove fields teams don't use; move the rest to another tab.

Give every team a dashboard

Each team starts the day seeing what needs action now.

Map the whole process

Fundraising, volunteers, programs. Find where people work around the system.

Report from the system

Grant and board reports draw from data staff already capture.

6K members returned

One national membership organization had a stalled implementation. Orchid fixed renewals first, then new member certification, then event insurance compliance, each in weeks. Chapters now manage their own rosters, reports, and signatures. The technology wasn't the only reason members came back, but it was a strong enabler of the results.

$1M in first-year revenue

A national organization is rolling out seven portal experiences for members, sponsors, students, and affiliates, and expects to retain or grow about $1M in year one.

Who the Roadmap is for

Good fit

Foundations, human services agencies, and advocacy groups on Salesforce 12+ months, facing any of the 5 problems, or burned by a previous partner.

Not a fit

Not yet on Salesforce.

The Salesforce ROI Roadmap

A 30-minute 1:1 with you and Tanya Renne.

You leave with a prioritized list of what to fix, sequenced by effort and impact. No obligation to continue.

Book Yours

Solved. Simple.

Orchid Connect

Salesforce consulting, managed services and tech specializing in nonprofits.

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