

Custom-Built Fundraising Platform Transformation Blueprint

A complimentary pathway from a heavily customised
Sales Cloud environment to Agentforce Nonprofit

LAVABOX

Engagement Overview

This engagement is designed for established fundraising organisations whose heavily customised Sales Cloud environment is making change difficult, costly or risky. LavaBox is familiar with your data model (relying on custom contribution and commitment objects, extensive Apex code, bespoke receipting and manual processes).

The process begins with a complimentary Exploration and Alignment Session to understand the organisation's ambitions, current environment and priorities, and to establish mutual fit.

Assuming a mutual fit, LavaBox will work with you on the agenda and attendees for a complimentary 90-minute cross-functional workshop. The workshop explores the strategic, operational and technology barriers preventing progress.

LavaBox then develops a clear set of findings and recommendations, an indicative application architecture and a recommended pathway towards Agentforce Nonprofit. These are presented through a strategic playback, including the potential role of Data 360 and Agentforce Marketing in putting donor data to work through always-on lifecycle journeys.

Is Your Custom Salesforce Setup Holding you Back?

Change is slow, costly and risky

Even straightforward platform changes require significant effort, extensive investigation or specialist development.

Manual workarounds consume time

Fundraising and administration teams rely on manual processes to complete work that the platform should support.

AI and platform innovation feel out of reach

The current environment makes it difficult to adopt AI and take advantage of the capabilities Salesforce continues to add to its platform.

Salesforce is not enabling progress

The organisation cannot readily adopt current capabilities or realise the expected value from its Salesforce investment.

Fundraising Technology that Matches your Ambition

Agility to innovate

Establish a maintainable foundation that makes it easier to respond, improve and innovate.

More capacity for impact

Reduce manual administration and free staff to focus on fundraising, supporters and the organisation's mission.

Benefit from ongoing Salesforce R&D

Benefit from the billions of dollars Salesforce invests in advancing its platform, AI and capabilities.

Put donor data to work

Use Data 360 and Agentforce Marketing to support always-on donor lifecycle journeys, increased donations and donor retention.

Key Deliverables

LavaBox will turn the workshop findings into practical outputs that support stakeholder alignment and an informed decision about the organisation’s future fundraising platform.

Deliverable	Description
Findings and recommendations	A consolidated view of the strategic, operational and technology barriers affecting progress, together with the areas where change could create the greatest value.
Indicative application architecture	A high-level view of the Salesforce capabilities, applications, data and integrations that could support the future fundraising environment.
Recommended pathway forward	A practical direction towards Agentforce Nonprofit, including data and migration considerations, potential donor lifecycle capabilities and indicative next steps.
Strategic playback	A presentation of the findings, architecture and recommended pathway to support stakeholder discussion and alignment.

Investment

Complimentary for Organisations Considering Significant Transformation

This complimentary review represents a significant commitment from LavaBox and is intended for organisations with an appetite to invest meaningfully in transformation. Custom transformation engagements typically start at approximately \$150,000, with final scope, investment and timing confirmed following the review.

Project component	Description	LavaBox Hours
Exploration and alignment	Understand the organisation's ambitions, current environment and priorities, and establish mutual fit.	1
Workshop preparation and collaboration	Jointly develop the agenda, confirm the right participants and review relevant background information.	4
Workshop facilitation	Facilitate the tailored 90-minute cross-functional workshop.	1.5
Findings and recommendations	Consolidate the workshop findings and identify the principal barriers, opportunities and priorities.	4
Indicative application architecture	Develop a high-level view of the future applications, Salesforce capabilities, data and integration landscape.	6
Recommended pathway forward	Define an indicative pathway towards Agentforce Nonprofit, including migration, donor lifecycle considerations and indicative investment.	3
Strategic playback	Present the findings, architecture and recommended pathway and discuss the next steps.	1.5
Total LavaBox Effort		21 hours
Typical Investment	Based on Director and Application Architect rates.	\$5,292 \$0

Next Steps

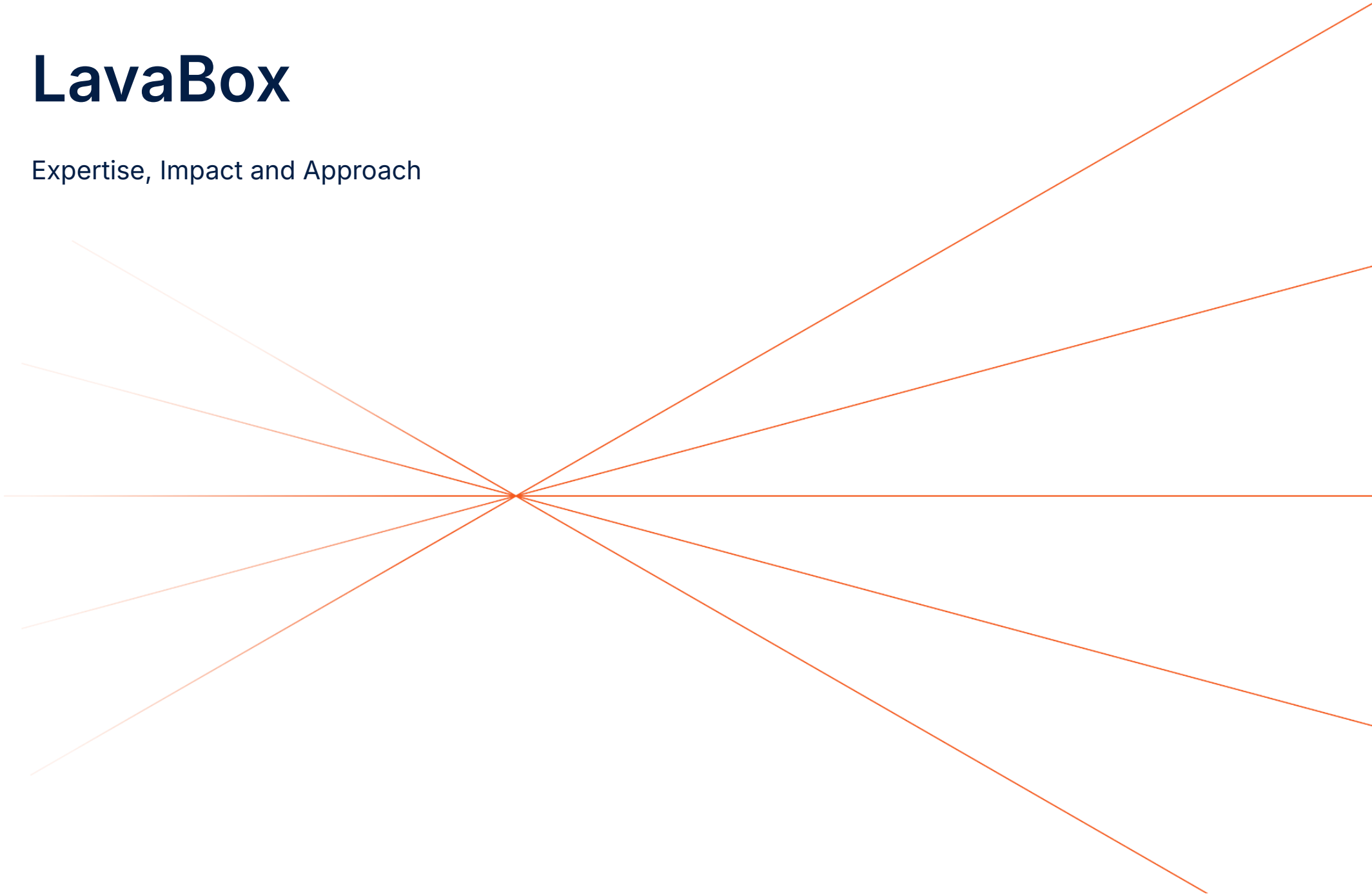
The first step is a short conversation to understand the organisation's ambitions, current Salesforce environment and appetite for change.

From there, LavaBox will work with the organisation to identify the right stakeholders and jointly shape the agenda for a complimentary 90-minute cross-functional workshop.

Book an Exploration and Alignment Session with the right LavaBox specialist [here](#).

LavaBox

Expertise, Impact and Approach



We partner with aspirational organisations to shape their initiative's North Star, cut through complexity and chart a clear path to deliver the **outcomes that matter.**



LavaBox at a Glance

28 Consultants

Strategic thinkers, industry experts and technical specialists.

11 Years

Delivering Impactful outcomes with Salesforce, Data & AI platforms.

4.8/5 Stars

From reviews on the Salesforce AppExchange.

Australia & New Zealand

Onshore teams and entities in both countries.

3 Industry Specialisations

Financial Services, Nonprofit and Automotive.

Strategic Clarity. Impactful Outcomes.

What you can expect when you work with us.

Our Values



Value Relationships

We create high-trust relationships with the people we work alongside.



Bring Clarity

We help our clients cut through complexity to make decisions that align with their objectives.



Deliver Impact

We relentlessly focus on delivering the outcomes that matter most to our clients.



Pursue Excellence

We are on a never-ending quest to build the best team and delivery in the industry.

Our Services



Strategy

We create a shared North Star - a strategic blueprint that cuts through complexity, aligns stakeholders and guides decisions.



Implementation

We craft the objectives and key results (OKRs) that will measure your project's success. Then we design and deliver impactful solutions at high velocity.



Managed Services

We combine responsive support with proactive continuous improvement to ensure your solution is optimised to meet its objectives post go-live.

Nonprofit Industry Expertise



Dedicated Nonprofit Practice

16 Salesforce industry experts delivering nonprofit solutions all day, every day.

Deep Salesforce Nonprofit Expertise

Grant Making, Fundraising, Marketing, Program and Case Management solutions.

Marketing & Data Cloud for Nonprofits

We've helped leading ANZ Nonprofits to take their donor and community engagement to the next level.

Australia & New Zealand

Onshore teams in both countries, with offices in Sydney and Auckland.

Nonprofit Impact Framework

A proven framework to support your mission.

Strategic Clarity. Impactful Outcomes.

What you can expect when you work with us.

Trusted by Leading Nonprofit Organisations to Make Impact Happen



Nonprofit Impact Framework

Understand your Constituents

With a unified view of your supporters, donors, funding stakeholders, clients and volunteers.



Measure Your Impact

With real-time reports that capture the metrics that matter to your funders.



Design Your Experience

With personalised email, mobile, social and digital touch points powered by [Pardot & Marketing Cloud](#).



Increase Your Impact

By designing, automating and integrating your programmes' delivery processes.



Empower Your People

With the tools, insights and training they need to drive your mission forward.



Grow Your Funding

By showing your funders the impact of their gift, with engagement plans fostering deeper levels of engagement.



Learn more: lavaboxconsulting.com/nfp

Thank you

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