Coalition Ending Gender-Based Violence

Project Proposal

INFO 380: Information System Analysis & Design

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1 GENERAL PROJECT INFORMATION

1.1 Project Scope Statement

Lauren, along with the Coalition Ending Gender-Based Violence (CEGV), has been operating on a limited version of Salesforce, preventing them from utilizing many tools which are available to them as a non-profit organization. After properly updating their system, we are helping to expand their donor information system and better understand ways which Salesforce can benefit them. Improving and educating the Coalition on their new system will enable them to enhance donor information, allowing for mass donation and contact entrances, increased cooperation with Click - and - Pledge donations, and improved dashboard reports that can be generated manually or on a timeline. This will drastically improve the quality of the data the Coalition is able to pull, while considerably reducing the time required to input the information.

PROJECT NAME	Coalition Ending Gender-Based Violence Project Proposal
DATE OF AUTHORIZATION	April 21st 2016
PROJECT START DATE	April 21st 2016
PROJECT COMPLETION DATE	June 2nd 2016

1.2 Team Members and Contact Information

	POSITION	EMAIL
Henry Alms	Project Manager	almsh@uw.edu
Julian Boss	Implementation Specialist	bossj@uw.edu
John Diego	Salesforce Research Analyst	jadiego@uw.edu
Rahul Banala	Design Specialist	rbanala@uw.edu
Brian Chung	Data Analyst Specialist	bchung95@uw.edu
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1.2 Customer Contact Information

CUSTOMER	Lauren Peterson
CUSTOMER'S ORGANIZATION	1419 S. Jackson St, #103 Seattle, WA 98144 **Phone:** 206-568-5454 **Fax:** 206-568-5462 **Email:** endgv@endgv.org

2 PROJECT DETAILS

2.1 Project Description

Gender-based violence weakens our community and harms us all. That's why we work collectively with our members to end gender-based violence and promote equitable relationships. The work of the Coalition Ending Gender Based Violence (CEGV) is grounded in a strong understanding of the issue, including the social and economic conditions in which women, LGBTQ people, people of color, people with disabilities, and children are especially vulnerable. We stand firm with the Coalition in the fight against gender based violence and seek to help them improve their technological presence.

The Salesforce program that they are currently using is outdated and requires an update. The current version of Salesforce in use is unorganized and requires manual entry of all the donors and data that they receive.

The CEGV originally implemented their Salesforce instance in 2009. Over time, this older template has depreciated and is no longer automatically supported by the Salesforce Foundation. The Coalition needs to assess its data management requirements and assist in developing a plan for upgrading their old Salesforce instance to the new Salesforce Nonprofit Starter Pack template.

2.2 Project Scope and Key Objectives

Lauren, along with the CEGV, has been operating on a limited version of Salesforce, preventing them from utilizing the tools in place to simplify their job. After properly analyzing their system, we are hoping to expand their donor information system and help them better utilize Salesforce information system. Improving and the Coalition's Salesforce system will enable them to enhance donor information, improving their outreach, and organize events and campaigns. This will drastically improve the quality of the data the Coalition is able to pull, while considerably reducing the time required to manage the information.

2.3 Key Stakeholders, Project Role, and Responsibilities

Our proposed plan will affect the CEGV members, most importantly Merril Cousin the Executive Director, Alison Iser the Project Manager, Lauren Peterson Fund Development Manager and Kate

Bovitch the Administrative & Operations Specialists. Other main stakeholders are all the officers and board members such as Kara Masters the Chair and Danielle Prince the Director. Other stakeholders involved in this project are Mike Doane, our professor as well as Aditya Kaul, and Sumeet Sharma, the teaching assistants who are overseeing progress and end results of the project. Donors, investors and volunteers are also our key stakeholder because these are the people who will be making this ambition operate and aid the people. Key donors who will be donating a great amount of money will be momentous therefore they will be higher on the stakeholders list.

Our responsibilities as a team will be that we will come to class and meetings on time, therefore we will have various outside of class meetings during the weekdays and the weekends. Come to class and team meetings with assignment and other necessary preparations done, therefore we we will have additional time to secure our project and leave our team extra things to add and improve upon. Our team will ask question from our mentors when we are not clear on expectations and keep an open line of communication between everyone who is involved in this project, especially with Lauren, Kate and our mentors. One of the next important responsibilities is to identify problems that could appear out of nowhere later in the project and we must focus on fastening them before any of those could get out of control later on in the process. Finally, for us to be responsible we must keep track of our responsibilities and expectations. To manage this responsibility we set up a work log/book which allows us to keep track of who is working on a specific type of assignment within the project and it will save us critical time and resources and everyone will be on the same page.

2.4 **Key assumptions and Approach**

The teams will work with the Coalition to design and develop an implementation plan to upgrade and improve upon their existing Salesforce database. During this process, our approach is to interview key Coalition staff, review current systems and data, and work to determine needs regarding database technology and process solutions. We will also gather information about the following areas - donor and member tracking and reporting, grants management, communications tracking, custom reporting. With our approach and the information we intend to seek, we also have the following key assumptions:

- They mainly use current information systems, Salesforce, to track donors and donations gained, and a members list. They are open to other ideas of how a new information system can aid other business operations.
- SalesForce will be the main software information system to be used to facilitate the organization's database. Along with Salesforce, other software programs will be integrated such

as VerticalResponse, as a mailing list. With these programs in mind, we will try to understand how to use the programs more efficiently and find out other functions which our client were not able to find.

- The information systems that will be implemented will be mainly used by organization employees, mainly the database administrators. According to Lauren, only two users have access to the current database, since they have the password. They are however, open to the idea of granting volunteers temporary access.

2.5 Possible Alternatives

Our first and foremost goal is to find an effective system within the SalesForce Nonprofit Starter pack. However, we also consider the following alternatives:

- Look for other open source solutions such as:
  - SuiteCRM
  - Capsule
- Design and develop a very lightweight database information system tailored to the needs of the organization

3 FEASIBILITY ASSESSMENT

3.1 Economic Feasibility

Due to the nature of its work, the coalition has a limited budget and by enlisting this class to develop the plan, the majority of their budget will be allocated to the implementation of the system. The new system will focus on reducing the current time allocated to input and manage donor information. By automating this process, the CEGV will have increased confidence in their data and more time available. This increased time will enable them to focus on donor outreach and event management. Focusing time on the contacting donors instead of managing and verifying their data will allow for much better event planning and increase their outreach potential, likely bringing in more donations.

3.2 Technical Feasibility

The project will feature a new, free non-profit version of Salesforce, Salesforce for Nonprofits, which is an upgrade over the previous version, Salesforce Enterprise. The technical experience of the iSchool faculty and staff are a necessary resource in the implementation of the new version; it's necessary that we establish systems to teach new volunteers and employees the technical skills required to operate Salesforce, in order for the CEGV to operate independently from the iSchool. Another alternative would be to solicit help from 501(c) which has a specific technical assistance branch. In addition, the CEGV needs to properly transfer all of the data currently in Salesforce Enterprise to Salesforce for Nonprofits; it is imperative that this is done correctly, else the current operations of the CEGV may be put at risk.

3.3 Operational Feasibility

The project works to implement the new version of Salesforce for the CEGV. The solution will need to remain consistent and provide at least all features used by the previous system. However, a goal of ours is simplifying current processes to better solve the CEGV's current problems and take full advantage of all services Salesforce has to offer. The project will need to account for training of new employees with the software, and getting them acclimated to the new system and the features we propose. How we implement our idea is integral to maintaining the business' current functions; if employees aren't properly trained or new features aren't properly explained, we may fail to take full advantage of Salesforce and the opportunity provided.

3.4 Legal and Contractual Feasibility

Our solution to implement a new version of Salesforce will have to fulfill our contractual obligations to our customer, namely Lauren Peterson and the CEGV. To do that our group will implement and go through our project thoroughly to make sure that anything we do during the development and implementation of the project, we are not overstepping any legal boundaries that might land us, and our customer in legal trouble.

3.5 Political Feasibility

For the project, we have more political feasibility as we're going through Lauren Peterson, the development manager for the CEGV. However, our plan needs to appeal to all persons involved in the CEGV's political processes if it is to be implemented. We'll especially need to work with Merril Cousin, the executive director, as her stated needs and desires from Salesforce need to be met in order for our project to be implemented.

3.6 Schedule Feasibility

The project is restricted to the duration of Spring quarter ending on June 3nd, 2016. The projects will be reviewed and possibly implemented in the Summer of 2016. Our group is required to submit two current analysis on May 5th and 19th, and a future state analysis on May 26th. The final project is due on June 3nd, 2016.

4 WORK BREAKDOWN STRUCTURE

4.1 Estimate Resource Requirements

- New Salesforce System specialized for nonprofit organizations
- Two administrative accounts with access to all of Salesforce
- Four restricted accounts for volunteer use and event planning
- Human resources required to execute the data migration
- Time will be devoted to research, implementation, and instruction.

4.2 Preliminary Schedule

- Complete Business Project Plan - May 3, 2016
- Requirements Elicitation - May 10, 2016
- Current State Analysis - May 13, 2016
- Develop System Diagrams - May 20, 2016
- Future State Analysis - May 25, 2016
- Final Presentation - May 31, 2016

5 CURRENT STATE ANALYSIS

5.1 Client Overview

Our client is Lauren Peterson from the Coalition Ending Gender-Based Violence (CEGV). The CEGV is a non-profit organization which works with various other organizations to help ending gender based violence, through creating awareness, pushing for legislation at the state and local level and providing communities with resources to better handle domestic violence, sexual assault and sex trafficking.
Lauren is the Funds Development Manager for the CEGV. Her job requires her to keep track of donations received, update donors on future events, invite donors and guests to events such as fundraisers as well as generating reports about donations from Salesforce and record keeping. Lauren has requested our help in creating a plan for upgrading the current edition of Salesforce (Salesforce Enterprise Edition) to Salesforce for Nonprofits. As her current edition of Salesforce is about to expire, continued use would create incompatibilities with updates from Salesforce and certain apps that work in conjunction with Salesforce (VerticalResponse, Click and Pledge). This has resulted in impacting the flow of data throughout the organization and slowing down the overall progress for the CEGV.
Through this upgrade, we are going to assist Lauren and help her retain previous donor information and other important data by providing her with the information necessary to shift from Salesforce Enterprise to Salesforce for Nonprofits.

Our goals include:

- Automate processes such as keeping track of donor information
- Upgrade Salesforce from Enterprise Edition to the Nonprofit Edition
- Help Lauren and others use Salesforce to the fullest extent
- Provide alternate options to Salesforce

5.2 Project Overview

Lauren, along with the CEGV wants us to design and develop an implementation plan to upgrade and improve upon existing Salesforce database. Since Lauren and her team is currently operating on a limited version of Salesforce software it makes them extremely difficult and complicated to keep track of their donors, interact with them and they have to enter most of the data about their donors manually. With Salesforce we are going to utilize the tools in place to simplify their job, such as automate some sales and sales force management functions, operate throughout the cloud so that it allows sales reps to function more fluidly without being there physically. After we study their systems and their interactions with the program we are hoping to expand their donor information system and help them better utilize Salesforce information system. This will not only drastically upgrade the quality of the data that the CEGV is able to pull, but it will also improve the outreach to the donors, stronger and stable connection therefore organizing campaigns, events and donor gatherings more efficiently.

5.3 Current System Overview

The Coalition Ending Gender-Based Violence originally implemented their Salesforce instance in 2009. This version of Salesforce is now depreciated and is not supported by Salesforce Foundation. Salesforce is mainly used by two users, Lauren, the Fund Development manager, and Kate, the Operations Specialist. Lauren uses Salesforce for donor and event management while Kate uses it for tracking members. They are the only two using it because they are the only two who knows the password. Alongside Salesforce, they also use other tools such as Vertical Response (email platform) and Click and Pledge (payments and events platform). These two are integrated into Salesforce. One of the biggest constraints they are currently facing is that soon their version of Salesforce won't be compatible with the mentioned applications. They also use another application, QuickBooks, for all accounting purposes, but it is not integrated with Salesforce. They use QuickBooks to manually compare information in Salesforce every month.

Both member's use of Salesforce is very limited and only do basic functions within the system. Kate, for example, uses Salesforce mainly for updating members and email lists. She adds members manually from the information collected from the forms filled out. They have online forms but they don't integrate well with Salesforce. They both use Vertical Response on a regular basis to communicate to different lists.

5.4 As-is Process Flows

The current process begins with donor outreach. Whether that is emailing potential donors to notify them on events, or asking them for a small amount to pledge, there is initially an email informing them of events at the coalition. If the donation is via credit card, it will be automatically updated through Click and Pledge, if not the donation is logged separately, but still processed in QuickBooks.

After each transaction is processed in QuickBooks, a receipt of the donation will be sent to the Funds Development Manager. Using these donation receipts, the Salesforce database is manually checked for accuracy on a monthly basis. Based on the type of donor, and the way they became involved in the coalition, they will be added to a specific donor campaign in order to continue to perform outreach. Information regarding these campaigns are spread through Vertical Response and application for campaign management.

5.5 As-is Use Cases

Use Case 1: **Verify donation received from donors in Salesforce**

TITLE	Verify donation accuracy received from donors in Salesforce
PRIMARY ACTOR	Funds Development Manager - Lauren Peterson, Operations Specialist - Kate Bovitch, Salesforce, Quickbooks
LEVEL	Kite (summary)
STAKEHOLDERS	The Coalition Ending Gender-Based Violence (CEGV), Lauren Peterson, Kate Dovitch, Donors
PRECONDITION	Donation has been made
MINIMAL GUARANTEE	Donation appears in Salesforce
SUCCESS GUARANTEE	Donation logged in Salesforce to the individual that donated matches the amount that is received in Salesforce
TRIGGER	Funds Development Manager receives email notifying her of a new donation
MAIN SUCCESS SCENARIO	1. Receives copy of receipt 2. Go into Salesforce to verify donor has a contact 3. Click on contact 4. Go to opportunity 5. Verify “organization” is an individual 6. Check “Gifts This Year” to verify the donation 7. Add/verify member is in correct email campaign due to donation size/purpose

EXTENSIONS	1. Salesforce does not match up with donation received in Quickbooks 2. Total monetary donations is off a small amount

Use Case 2: **Updating Major Donor Campaign List**

TITLE	Add Member to Major Campaign
PRIMARY ACTOR	Funds Development Manager
LEVEL	Kite
STAKEHOLDERS	Major Donors - Superheroes
PRECONDITION	1. Members must be tracked first and added as a member in Salesforce, and their donation via Click & Pledge has already been processed 2. They must donate a minimum of $500 within the past year
MINIMAL GUARANTEE	Donors are added to the Major Donor campaign
SUCCESS GUARANTEE	Donor becomes part of exclusive high donor list
TRIGGER	Donor makes a single donation of $500+, combined sum of annual donations surpasses $500
MAIN SUCCESS SCENARIO	1. Donor makes a new donation 2. Operations Specialists tracks donation in Salesforce 3. Donor's annual donations surpasses $500 4. Donor becomes member of Major Donor Campaign List
EXTENSIONS	**1.** There is an incorrect or unpopulated email field due to a monetary donation **2.** New donor and spouse each make separate donations totaling over $500 but less individually in their own names a. Salesforce accounts aren't linked, preventing them from obtaining Major Donor status

Use Case 3: **Audit of Implementation Plan**

TITLE	Audit of Implementation Plan
PRIMARY ACTOR	Lauren Peterson, Kate Bovitch, Merril Cousin, Mike Doane, Aditya Kaul, Sumeet Sharma, Group AA1
LEVEL	Kite (Summary)
STAKEHOLDERS	The Coalition Ending Gender-Based Violence (CEGV) Board, iSchool
PRECONDITION	Completed document must be submitted and our plan approved by the team for inspection, review and feedback.
MINIMAL GUARANTEE	Submit our implementation plan that we designed and developed to upgrade and improve the Salesforce database to better access donor information.
SUCCESS GUARANTEE	The CEGV implementing our project plan and use the upgraded system to continue their cause and contact their donors.
TRIGGER	The CEGV Board reviewing our project plan
MAIN SUCCESS SCENARIO	Our plan getting fully reviewed and approved by the board then implementing this upgrade to their systems.
EXTENSIONS	1. Scope Document and implementation gets denied and has to go back through the cycle for improvements 2. Scope Document and implementation missing a few key points that the stakeholder needed and requested. 3. Team does not meet the deadline for submitting the review causing delay and frustration.

Use Case 4: **Make a Donation (Online)**

TITLE	Make a Donation (Online)
PRIMARY ACTOR	Donor, Funds Development Manager, Click and Pledge, the CEGV website interface
LEVEL	Kite
STAKEHOLDERS	Funds Development Manager, Donor, the CEGV, Donation Beneficiaries, Credit Card Company
PRECONDITION	1. Must have access to a computer 2. Funds to donate

	3. An understanding of how to make an online transaction
MINIMAL GUARANTEE	Donor navigates to Click and Pledge to make donation
SUCCESS GUARANTEE	Donor makes a donation through Click and Pledge
TRIGGER	1. An email received from the CEGV 2. Hearing the story of someone affected by gender based violence
MAIN SUCCESS SCENARIO	1. Donor is compelled to make an online donation 2. Donor is able to access a computer and navigate to the CEGV's website 3. On the website, the donor is able to find the "Donate" button 4. The donor has sufficient funds to make a donation 5. The donor has a credit card or PayPal account which enables them to make a donation 6. The donor fills out the required information to make a donation 7. The donor completes the donation
EXTENSIONS	1. The donor doesn't have access to a computer to make an online donation 2. The donor doesn't have funds to make a donation 3. The donor doesn't have the form of payment required to make an online donation

Use Case 5: **Donation and QuickBooks report generation**

TITLE	Donation and QuickBooks report generation
PRIMARY ACTOR	Donor, Funds Development Manager, Administrator, Bank
LEVEL	Kite
STAKEHOLDERS	Funds Development Manager, Donor, the CEGV, Donation Beneficiary's, Bank
PRECONDITION	1. Must have funds to donate 2. Must have access to a computer 3. Funds to donate 4. An understanding of how to make an online transaction
MINIMAL GUARANTEE	Donation and donor information comes from bank through QuickBooks
SUCCESS GUARANTEE	Donor and donation information comes from bank through QuickBooks and appears in Salesforce
TRIGGER	1. An email received from the CEGV 2. Hearing the story of someone affected by gender based violence

	3. Email received by the Administrator and Funds Development Manager
MAIN SUCCESS SCENARIO	1. Donor is compelled to make an online donation 2. Donor is able to access a computer and navigate to the CEGV's website 3. Donation and donor information is sent to Funds Dev Manager through email 4. Donation and donor information is cycled through the bank and is received by the admin through QuickBooks
EXTENSIONS	1. The donor doesn't have access to a computer to make an online donation 2. The donor doesn't have funds to make a donation 3. The donor doesn't have the form of payment required to make an online donation 4. Clearance from bank is not received in QuickBooks for the Admin

Use Case 6: **Inviting donors and guests to a fundraiser**

TITLE	Inviting donors and guests to a fundraiser
PRIMARY ACTOR	Lauren, Kate, Invited donors and guest
LEVEL	White
STAKEHOLDERS	The Coalition Ending Gender-Based Violence (CEGV)
PRECONDITION	1. The CEGV decides to host a fundraiser event 2. An organization event, especially a fundraiser event, is upcoming and donors need to be notified 3. They must have enough credits in Virtual Response to email the proper list
MINIMAL GUARANTEE	Invited members receive invitation to the CEGV hosted event via Vertical Response
SUCCESS GUARANTEE	Invited members, especially donors, accepts the invitation received, and intends to go
TRIGGER	The organization has planned out an event, such as a fundraiser
MAIN SUCCESS SCENARIO	1. An event registration is created via Click and Pledge 2. VerticalResponse is used to send out mass email to invite members to fundraiser and refers them to that registration form 3. Members accepting invite are then added to a specific titled group in Salesforce for recording purposes
EXTENSIONS	1. The registration form has to already be created online before it could be sent to other people via email 2. Emails need to be sent to specific individuals, not large groups of people

	3. There are no events being hosted by CEVG for a long period of time. a. Donors notices organization inactivity and decides to stop being a recurring donors.

Use Case 7: **Notify Board of Fundraising Efforts**

TITLE	Inform Board of Fundraising Efforts
PRIMARY ACTOR	Funds Development Manager, Board of Executives
LEVEL	White
STAKEHOLDERS	Board of Executives, Funds Development Manager, Operation Specialist
PRECONDITION	1. Collect previous year's fundraising information in Salesforce 2. Create plan of fundraisers to continue 3. Pull information from Salesforce
MINIMAL GUARANTEE	Projected Fundraisers are presented to board
SUCCESS GUARANTEE	Data on previous fundraisers are presented to the Board to inform them on the reasons specific fundraisers will be continued.
TRIGGER	Desire to increase fundraising and continually improve the events put on by the CEGV
MAIN SUCCESS SCENARIO	1. Create report of annual monetary donations 2. Sort information by campaign event and money raised 3. Convert to dashboard to help with visualization for the board 4. Present information to board members
EXTENSIONS	1. Information cannot be accurately separated by event from the report 2. Donation Data isn't properly represented in a Dashboard

5.6 Current IT, People & Process Problems

- Many aspects of Lauren's workflow are paper-based. This causes inefficiencies and more work for volunteers and the staff, whose wasted time could be better spent elsewhere.
- Risk of human error is high in paper-based processes.

- Only two employees use Salesforce regularly with administrator accounts; other employees may use Salesforce on restricted accounts but aren't properly trained to do so. Training would be necessary to move them away from paper-processes.
- The current version of Salesforce Enterprise doesn't offer the full scope of Salesforce services and is no longer supported by the company.
- There is a non-profit version of Salesforce that this nonprofit could be using.
- The CEGV doesn't know the full scope of what Salesforce has to offer and doesn't use all of the features available to them.
- The process to keep track of donors is currently complicated and manual.

5.7 **Current State Risk Assessment**

- Salesforce is no longer updating the enterprise edition the CEGV is operating on
- There is the potential they will lose all their data if left on the current system.
- The majority of the data is entered manually, resulting in high error probability and critical time spent verifying data points. Employees and volunteers currently lack training to make this system electronic.
- There is only one account associated with Salesforce, but with two people using it which makes it impossible to track who is working on what, or simultaneous work.
- There is a lack of understanding of the tools, services, and general working of Salesforce, preventing them from not only using it to the fullest extent, but from training other members to use it.

5.8 **Recommended Next Steps**

Our recommended next step for the CEGV is to facilitate the use of Salesforce for Nonprofits. This recommended Salesforce system allows the leniency of Salesforce Enterprise, which the CEGV is currently using, but is streamlined in order to provide the best support for a non-profit organization to organize their data and access it readily. Another benefit of Salesforce for Nonprofits is the discounted rate at which it is offered, which lowers the operating costs for maintaining and upholding the CEGV's current data systems. The CEGV at this point is still very reliant on limited systems usage, however, with Salesforce for Nonprofits the CEGV can maintain accruing data such as donors list, donations, fundraising capabilities as well as detailed analytics on the organization's overall performance.

Alternatives to Salesforce include using Salsa or Microsoft Dynamics. Salsa is a much more simple CRM focused on fundraising, advocacy and marketing. Salsa is a far cheaper alternative to Salesforce with a focus on managing donations, but the drop in price comes with a drop in functionality. If the CEGV doesn't fully utilize all the tools available to them through Salesforce, using Salsa to manage donations is a good alternative. Salsa also has the ability to integrate itself with Salesforce to better manage donations (which is Salsa's specialty). If the CEGV expands, it might be beneficial to use Salsa in addition to Salesforce.

Microsoft Dynamics is another CRM similar to Salesforce. It has a lot of functionality integrated with many of Microsoft's tools including Outlook which eliminates the need for Vertical Response. All of the functionality comes at a cost; Microsoft dynamics is much more difficult to set up and learn. If the CEGV starts expanding their coalition and need a more standardized CRM, Microsoft Dynamics' integration with Microsoft software may help bringing non-CRM run organizations under the coalition's wings.

5.9 Current State Analysis Summary

In order to make sure no donor information is lost, we plan to prepare the CEGV in transferring from the old Salesforce Enterprise edition to the newer Non-Profit edition. While maintaining their data, they will be able to introduce and train new users on the variety of roles that require Salesforce use, instead of sharing a single account. These updates will increase the efficiency of their use, in turn, allowing them focus more attention on donor outreach.

6 FUTURE STATE ANALYSIS

6.1 Executive Summary

Our future state analysis provides the Coalition Ending Gender-Based Violence (CEGV) the recommendations that our team carefully reviewed and changed in order for the CEGV to implement this new kind of business process which will help their needs and achievements. By inspecting the issues that the CEGV is currently facing, we came to the conclusion that we have to change their business process in order to be more efficient and automatic. We not only came up with solutions that will fix their current issues but we will also provide the main use cases for the changes we have made to the client, funds manager, and other potential stakeholders.

By using Salesforce, the CEGV will have the opportunity and comfort of using a software that has already been designed to manage nonprofit organizations while offering a low-cost package which the CEGV will qualify for. Salesforce also provides free client service and support all around the clock with visual and voice feeds, therefore if the CEGV has any issues or problems they can always ask for help from the client support. Our team is confident making this decision, but we were also cautious in the process of deciding the best software for the CEGV to use. We looked at several factors that could come up as a problem, such as migrating all the existing data that they have to Salesforce for Nonprofits, or additional costs such as training the client, or implementing and maintaining this new way of handling information. Even though there is possible risk we are still confident of this change as it will benefit the CEGV both short-term and long-term. Finally if the CEGV does not want to adapt to Salesforce for Nonprofits then we can always explain our way of thinking and outline the benefits and improvement that Salesforce can offer and explain why Salesforce for Nonprofits is the best way to go about.

In order to efficiently transfer the data over while enhancing the features of the current system, we recommend the CEGV contacts 501(c) to schedule a consultation. 501(c) has a tech branch solely dedicated to helping organization utilize technology to the best of their ability. Recognizing that Salesforce is a crucial CRM tool, they have part of the tech branch dedicated to helping organizations implement and customize Salesforce. We strongly recommend the CEGV utilizes this 501(c) resource as it will help in a seamless transition from enterprise to nonprofit as well as providing further insight in an area where they may have more expertise.

6.2 Future State overview

The implementation plan we are suggesting will allow the Coalition for Ending Gender Based Violence to transition from their old, unsupported version of Salesforce Enterprise to the newest, supported version of Salesforce Nonprofit. We want to enable the CEGV to use Salesforce to its fullest potential; by leveraging all of the capabilities of Salesforce Nonprofit, we plan to greatly increase efficiency by eliminating manual processes and more easily manage the donor list. We also plan to leverage new volunteer training to reduce the amount of strain Salesforce use puts on key members.
Our implementation plan protects the best parts of the current process, the integration with VerticalResponse and Click and Pledge, while bringing in new tools and training. Using Salesforce, we want to leverage new tools like the dedupe tool to generate reports, add new donor information, and notify donors about their donations. We recommend outsourcing help to train contracted workers to use Salesforce, as well as documenting the training to prevent having to repeat the service. Thankfully, through the use of restricted accounts, the CEGV will be able to keep the data secure and ensure integrity. We plan to teach Lauren and Kate about new management features of Salesforce Nonprofit which will allow them to manage and keep tabs on the newly trained workers.

6.3 Requirements Listing

- Teach the Funds Development Manager and Operations Specialist new features that they can use with Salesforce Nonprofit.
- Outsource others (i.e.: Volunteers, Contractors) to train new employees on how to use Salesforce Nonprofit and other new tools while documenting the process.
- Allow volunteers and contractors to manage donor information, campaigns and events with Salesforce Nonprofit without giving them access to sensitive donor information.
- Retain integration of current applications that is used in conjunction with Salesforce Nonprofit(ileocolic and Pledge, VerticalResponse).
- Automate certain processes through Salesforce Nonprofit such as generating reports, adding new donor information and notifying donors about their donations.
- Introduce a more efficient way of managing donor information (i.e.: updating donor status, donations).

- Transfer and clean data from the Salesforce enterprise version to the nonprofit version

6.4 To-Be Use Cases (People)

Use Case 1: Create Contact Information Profile for Volunteers to Manage

TITLE	Create Limited Donor Information Database for Volunteers
PRIMARY ACTOR	Volunteers, Salesforce, Funds Development Manager
LEVEL	White
STAKEHOLDERS	Funds Development Manager, Operations Specialist, Volunteers
PRECONDITION	Have Volunteers available to work on Salesforce
MINIMAL GUARANTEE	Create a database protecting sensitive donor information
SUCCESS GUARANTEE	Have volunteers work on a limited access donor database
TRIGGER	Save Funds Development Manager important time
MAIN SUCCESS SCENARIO	1. Have a database with all current contact information 2. Create a database which copies all fields that don't have sensitive information 3. Grant Volunteers access to the copied database only 4. Allow volunteers to work on database without exposing private donor information 5. Merge Databases after volunteers complete work, selectively choosing which fields to keep
EXTENSIONS	1. Volunteers aren't available when needed

Use Case 2: Document Data Clean Information

TITLE	Document Steps to Maintain Clean Database with Salesforce Dedupe tool
PRIMARY ACTOR	Trainer, Funds Development Manager, Operations Specialist
LEVEL	White
STAKEHOLDERS	Trainer, Funds Development Manager, Operations Specialist, Future Employees

PRECONDITION	Donor Information is stored in same fields consistently
MINIMAL GUARANTEE	Proper deduplication procedures are documented
SUCCESS GUARANTEE	Deduplication process consistently aids the CEGV in managing a clean database
TRIGGER	Over time, the data begins to get duplicated as donors attend events.
MAIN SUCCESS SCENARIO	1. Fields that show obvious duplicated are recorded 2. Process of deduplication is clearly outlined and documented 3. Fields that show duplicates are filed with proper donor information throughout the entire database 4. Funds Development Manager, or Operations Specialist can easily understand steps required to reduplicate contacts 5. A clean and updated database is maintained
EXTENSIONS	1. All duplicate fields aren't consistently containing information a. Information is deleted 2. Future employee changes database layout a. Deduplication documents no longer apply 3. Directions aren't clear enough for future employee to understand

Use Case 3: **Manage Campaigns with Contracted Workers**

TITLE	Contracted Workers Manage Email Campaigns Campaigns
PRIMARY ACTOR	Contracted workers
LEVEL	White
STAKEHOLDERS	Funds Development Manager, Operations Specialist, Contracted workers
PRECONDITION	Limited access databases for contracted workers to use, money to hire contracted workers
MINIMAL GUARANTEE	Have databases for contracted workers to use as well as contracted workers available to work on Salesforce
SUCCESS GUARANTEE	Contracted workers access limited access databases and manage email campaigns
TRIGGER	Large event upcoming and more help is needed reaching out to potential attendees

MAIN SUCCESS SCENARIO	1. Utilize limited access databases protecting donor information 2. Hire contracted workers prior to an event 3. Have contracted workers reach out to specific donors that require personal invitations
EXTENSIONS	1. No budget for contracted workers

Use Case 4: **Create Training Documents**

TITLE	Outline clear instructions on how to use Salesforce, Click and Pledge, Vertical Response, and Quickbooks
PRIMARY ACTOR	Trainer, Funds Development Manager, Operations Specialist
LEVEL	White
STAKEHOLDERS	Trainer, Funds Development Manager, Operations Specialist, the CEGV employees, Future employees
PRECONDITION	Have time to make documents, Have a clear understanding of what functions need to be outlined for future use so all functions are described
MINIMAL GUARANTEE	Documents are made outlining basic functions of each system
SUCCESS GUARANTEE	Descriptive documents are made outlining all functions utilized which aren't intuitive
TRIGGER	Desire to utilize all the same applications throughout the company
MAIN SUCCESS SCENARIO	1. Outline all current processes in respective applications 2. Have a trainer describe and outline potentially helpful functions of each application to document new uses before they have been implemented 3. Disperse documents throughout the CEGV 4. All employees use and understand the applications, minimizing the number of information systems employees have to manage
EXTENSIONS	1. Employees are unwilling to take the time to learn the new applications 2. Applications are updated with new features that were not outlined a. Transfer over to future employees may be difficult

Use Case 5: **Save Salesforce Reports**

TITLE	Generate Consistent Reports in Salesforce
PRIMARY ACTOR	Funds Development Manager
LEVEL	White
STAKEHOLDERS	Funds Development Manager
PRECONDITION	Databases are all completed with proper information in their respective fields
MINIMAL GUARANTEE	Save the end of the month donations report
SUCCESS GUARANTEE	Save all reports that need to be taken on a consistent basis
TRIGGER	Extract consistent information when needed, Simplify transition between employees
MAIN SUCCESS SCENARIO	1. Maintain databases with complete donor information 2. Tailor various reports to pull the information that is required 3. Generate reports that need to be taken on a semi-regular basis 4. Save the reports to prevent repetitive work
EXTENSIONS	1. Board asks for new or more information from reports 2. Information isn't properly maintain a. Information gaps in reports

Use Case 6: **Set Up AutoResponse for New Donors**

TITLE	Immediately Reply to New Donors on email
PRIMARY ACTOR	Funds Development Manager, VerticalResponse
LEVEL	Kite
STAKEHOLDERS	The Coalition Ending Gender-Based Violence (CEGV), Funds Development Manager
PRECONDITION	Set up VerticalResponse AutoResponse feature
MINIMAL GUARANTEE	Template is created for an email to be sent to new donors automatically
SUCCESS GUARANTEE	New donors receive an email after their first donation

TRIGGER	Improve donor information and involvement, improve donor relations
MAIN SUCCESS SCENARIO	1. Create a template for an immediate response email 2. Set us AutoResponse for first time donors 3. First time donation is made 4. Donor receives email on upcoming events and generic CEGV information at time when interest in Coalition is the most high
EXTENSIONS	1. Template needs to be continuously changes as events come and go

Use Case 7: **Update Donor Contacts Simultaneously**

TITLE	Salesforce Automatically adds Donors into VerticalResponse
PRIMARY ACTOR	Funds Development Manager, VerticalResponse, Salesforce
LEVEL	Kite
STAKEHOLDERS	Funds Development Manager
PRECONDITION	Download Zapier to link VerticalResponse and Salesforce
MINIMAL GUARANTEE	Integrate VerticalResponse with Salesforce
SUCCESS GUARANTEE	New contacts added to Salesforce will be automatically added into VerticalResponse
TRIGGER	Eliminate manual task of adding contacts
MAIN SUCCESS SCENARIO	1. Have a Salesforce Account 2. Have a VerticalResponse Account 3. Have a Zapier Account 4. Integrate Salesforce with VerticalResponse 5. Update a new contact in Salesforce 6. Contact automatically is made in VerticalResponse via Zapier
EXTENSIONS	1. No Salesforce/Zapier/VerticalResponse Account

Use Case 8: **Clearly Outline Documentation Process**

TITLE	Have a System of Documenting Different Process
PRIMARY ACTOR	Funds Development Manager, Operations Specialist, Salesforce,

	VerticalResponse, Quickbooks
LEVEL	White
STAKEHOLDERS	Funds Development Manager, Operations Specialist, Future Employees
PRECONDITION	Have knowledge on how the system is being used
MINIMAL GUARANTEE	Describe how some functions are used
SUCCESS GUARANTEE	Create a document to explain how to describe whichever new function is being introduced
TRIGGER	Desire to document all processes to make sure they are maintained
MAIN SUCCESS SCENARIO	1. Work with trainer to document current use functions 2. Understand what is important information to document as well as what may be extraneous 3. Document what to include in informational documents 4. Provide "Documentation Document" to entire company so all new application uses are recorded
EXTENSIONS	1. No one takes the time to document processes a. Use of applications becomes more confusing

Use Case 9: **Integrate QuickBooks with Salesforce via AppExchange and Workato**

TITLE	Salesforce Can Sync Donations into QuickBooks
PRIMARY ACTOR	Funds Development Manager, Operations Specialist
LEVEL	White
STAKEHOLDERS	Funds Development Manager, Operations Specialist and Upper level management
PRECONDITION	Download Workato to link VerticalResponse and Salesforce
MINIMAL GUARANTEE	Integrate VerticalResponse with Salesforce
SUCCESS GUARANTEE	New donations added to Salesforce will be added into QuickBooks once synced. Can work vice versa if donation comes in QuickBooks first.
TRIGGER	Eliminate manual task of verifying data

MAIN SUCCESS SCENARIO	1. Have a Salesforce Account 2. Have a Workato Account 3. Have a QuickBooks Account 4. Integrate Salesforce with QuickBooks via Workato 5. Hit Sync 6. Donations appear in Salesforce/QuickBooks without duplicating any information from previous syncs
EXTENSIONS	1. No Salesforce/QuickBooks/Workato Account 2. The same cash donation is recorded under slightly different amounts and is recognized as two different donations a. Donation appears twice

6.5 To-Be Process Flows

The as is process is focused heavily on connecting the right donor information to the right donor which is proving to be a laborious task. The to be process we are suggesting allows the donations from all donors to be handled by volunteers trained in using Salesforce Nonprofit to verify and add or remove donor information depending on campaign. The operations specialist can use the Salesforce Nonprofit and QuickBooks integration to access all financial and accounting records for the entire coalition along with being able to update any donor information. The funds development manager would focus more on the analytics aspect of fundraising through using Salesforce Nonprofit's analytics feature.
A major difference to the to be process flow is the use of volunteers to receive donations rather than all donations going to the funds development manager via email receipts. We are not removing the funds development manager's ability to access donation and donor records but moving the main functions of their responsibilities to recruiting, training and staffing volunteers in fundraising events.

6.6 Functional Design

- The CEGV will switch their Salesforce system from Salesforce Enterprise to Salesforce Nonprofit, this will allow the coalition to receive donations, organize donor lists and generate reports.
- Salesforce Nonprofit can also provide effective program management features that can allow the CEGV to customize their Salesforce platform to handle different forms of projects.

- When creating fundraising events, the funds development manager can use the volunteer management feature to recruit volunteers, view credentials, train and assign shifts to volunteers.
- Volunteers will use the established Click and Pledge system to receive electronic donations (donation receipts still sent to funds development manager), volunteers will also play a major role in assigning new donors and verifying campaigns
- The operations specialist can use the AutoResponse feature to generate an email campaign to donors, depending on if the donors are returning or new.
- The funds development manager and operations specialist can also gain access to Salesforce Nonprofit's analytics feature to generate financial and other quantitative reports.
- The operations specialist can also use Salesforce Nonprofit's QuickBooks integration feature to handle all accounting and financial needs in Salesforce Nonprofit's interface.

6.7 Recommendations and Alternatives

We recommend the CEGV to implement Salesforce for Nonprofit as it is a system that they have used previously. With the upgrade from Salesforce Enterprise Edition to Salesforce for Nonprofits, the time required to learn how to use Salesforce for Nonprofits and its new features drastically shrinks, allowing people who use Salesforce within the CEGV to resume their operations with minimal downtime.

In addition to Salesforce for Nonprofits, we have identified Salsa as another possible alternative for the CEGV to use. Salsa is primarily designed for nonprofit organizations to use, it has an easy way to communicate with external partners and donors through their donor management, the ability to adjust to meet the Coalition's growing donor base. Salsa also supports online fundraising and event organization capabilities. The downside to Salsa is that it is not as flexible as Salesforce in terms of customization and configuration if the user requires more functionality out of the system.

Another alternative to Salesforce would be Microsoft Dynamics. It is one of the leading CRM software currently used in the market. It shares many similar and better capabilities as Salesforce for Nonprofits such as integration with VerticalResponse. However, using Microsoft Dynamics has its drawbacks, it is unable to integrate with QuickBooks and Click and Pledge as it primarily used in conjunction with Microsoft products such as Outlook, OneNote and SharePoint. Furthermore, Microsoft Dynamics is very costly for organizations on a limited budget and therefore we do not recommend the CEGV to purchase Microsoft Dynamics.

6.8 Future State Risk Assessment

The following risks have been identified which could possibly transpire as the CEGV transition into adopting the Nonprofit version of Salesforce.

- **Financial:** Currently, the version of Salesforce software being used is free but no longer supported by Salesforce. Upgrading to a nonprofit version of Salesforce will mean agreeing to paying the monthly subscription fee. With already a limited budget to start, switching to the Nonprofit version of Salesforce may cause financial burdens.
- **Training:** Although new software comes with powerful features to help lessen the time to carry out business processes, not everyone is tech-savvy. A new version of Salesforce implies learning new ways to work the software. However, not everyone might not be on board of adopting a new system. If employees don't see an obvious positive affect the Nonprofit Salesforce has on their day-to-day work, they will most likely be frustrated and furious trying to adopt an "unnecessary" system.
- **Automating Email Replies:** Often with automated emails, they don't feel as personal with carefully thought out emails. This tradeoff will speed up business processes for email coordinators, but can leave a negative impact on the customer's end.
- **Updating Training Documents:** Documenting business processes is a great idea to standardize the norms of business processes, but often these change frequently. Taking into account the already busy schedule the Funds Development Manager and Operations Specialist has, and with limited staff using Salesforce, this could be too time-consuming.
- **Hiring:** The CEGV might not have the funds to contract outside workers to adopt the proposed business processes so these leads to leaving the work to current employees.

6.9 Summary and Conclusion

In conclusion, through the implementation of Salesforce Nonprofit we plan to eliminate bottlenecks in the current donation and management processes increasing efficiency and eliminating manual processes. This will relieve strain on key individuals and reduce the amount of time it takes to complete important tasks like donor management or report generating. By training new volunteers to use Salesforce in a restricted way, Kate and Lauren have the ability to move into a more managerial role, using their skill sets and time more effectively. Ultimately, this prepares the CEGV for an anticipated increase in size of the coalition and scale for donations.

7 APPENDIX

7.1 Current State

Figure 1: **BPM of Donation Process**

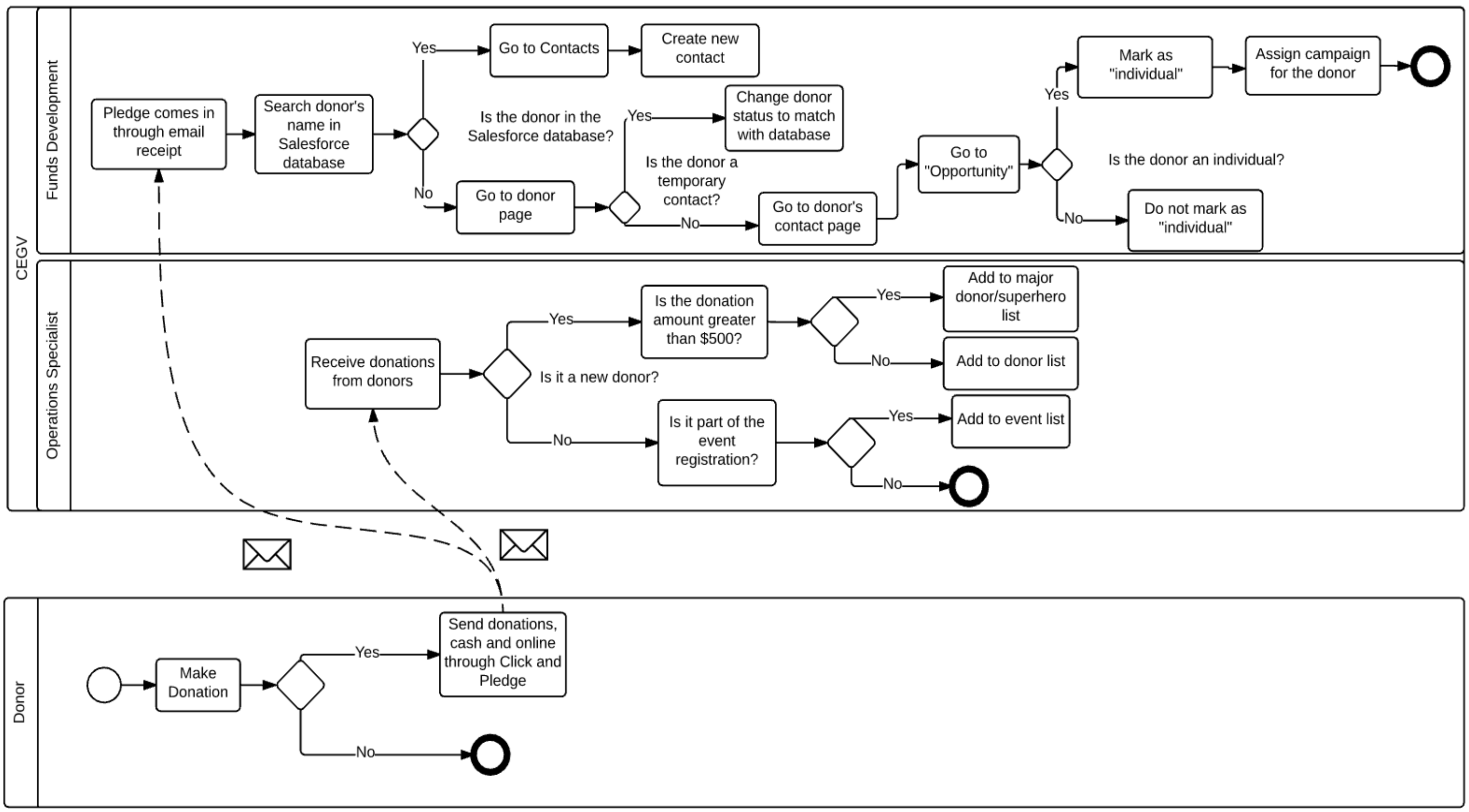


Figure 2: **Donation Process Use Case Diagram**

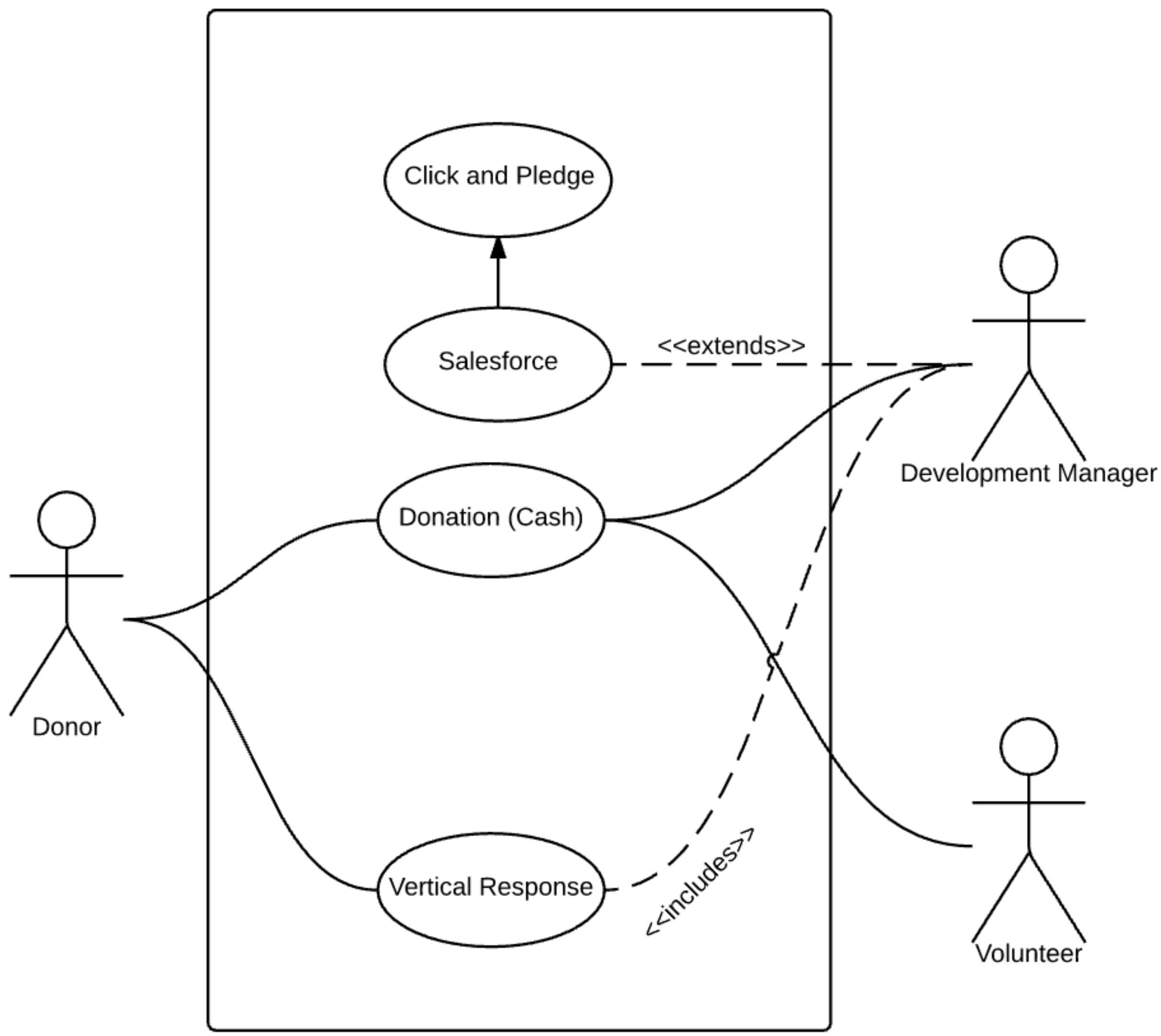
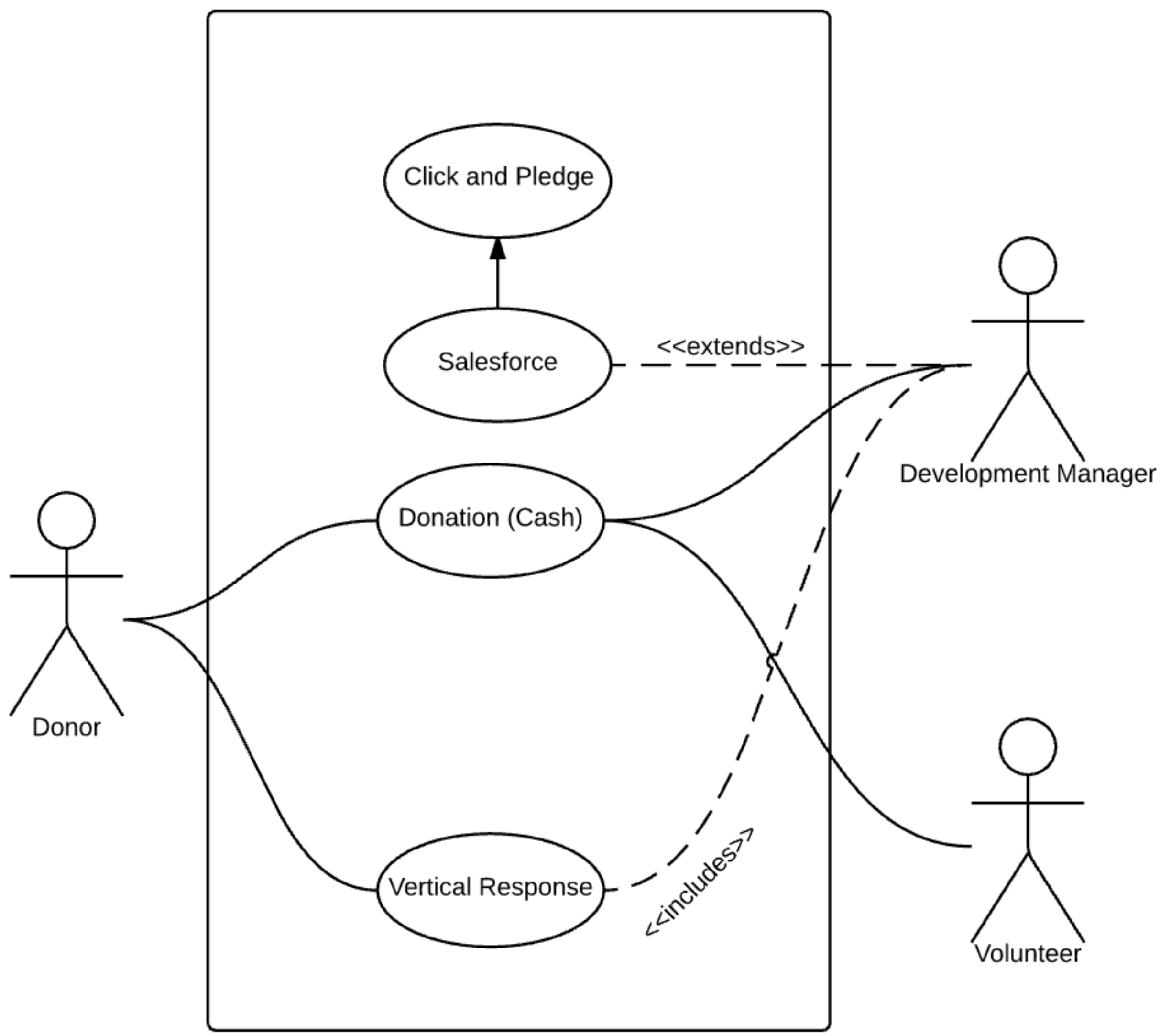


Figure 3: **QuickBooks Donor Organization Use Process**



7.2 Future State

Figure 1: **Future State Business Process Model (BPM)**

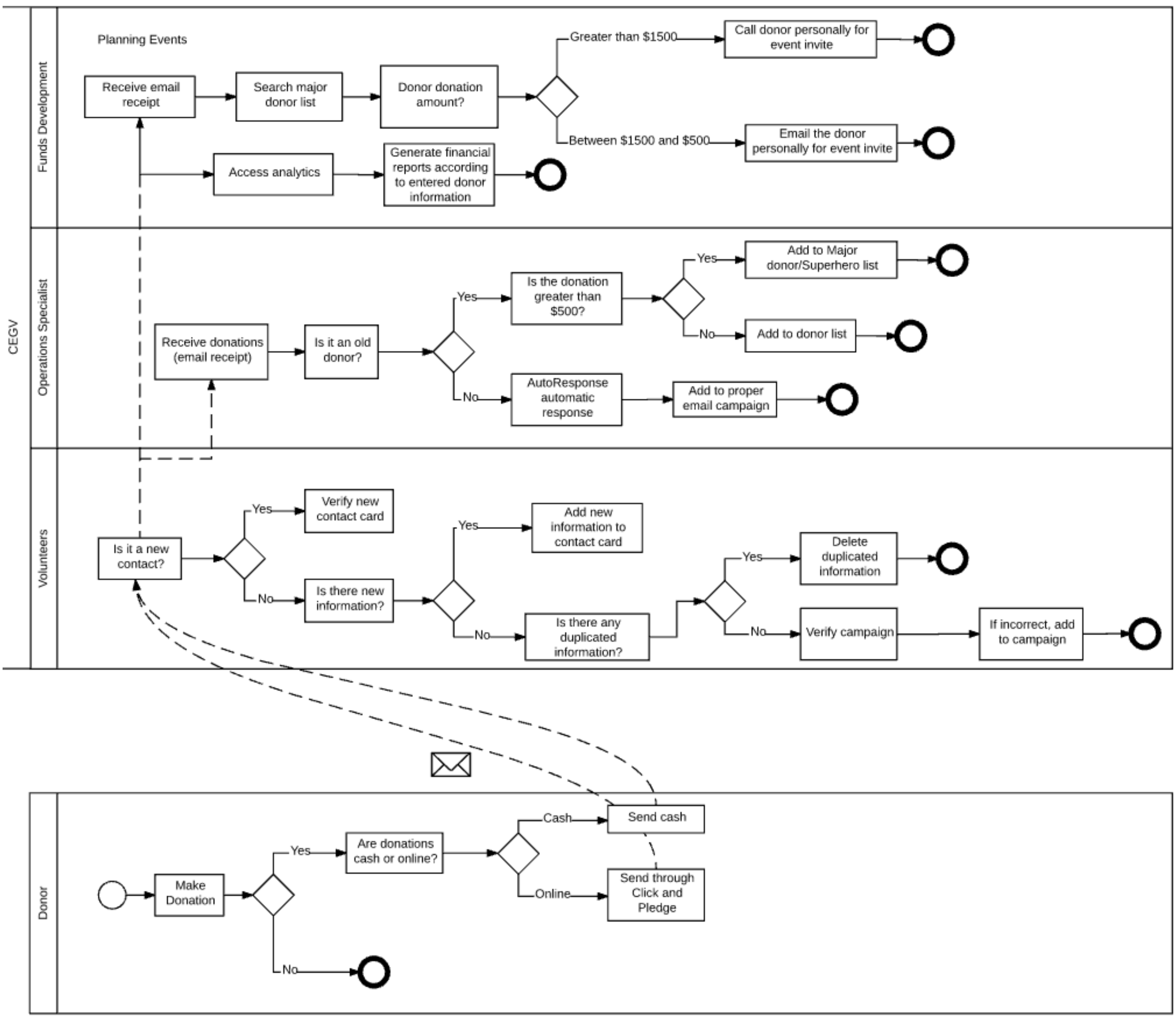


Figure 2: **Quickbooks Use Case Diagram**

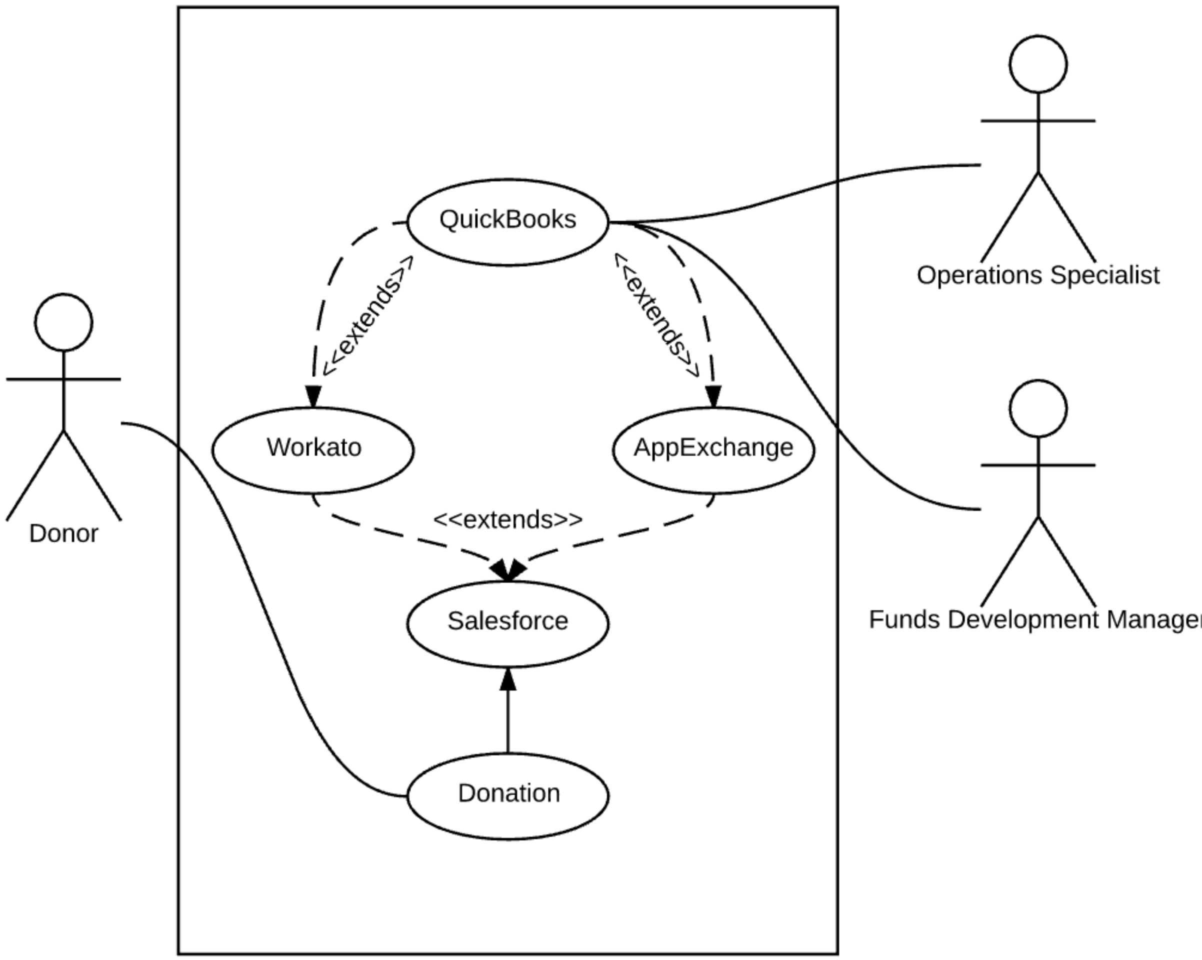


Figure 3: **AutoResponse Use Case Diagram**