

Smart Tech for Mission-Driven Impact

*How Salesforce Helps Nonprofits
Scale, Streamline, and Succeed*

 **Mission**

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How Salesforce Is Enabling Nonprofits To Keep Pace and Succeed

If your nonprofit is looking for a powerful platform to raise more money, streamline operations, and deepen impact, you've probably considered Salesforce. And that's smart thinking. Because with over 50,000 nonprofits already leveraging its capabilities, Salesforce has become a trusted solution for mission-driven organizations of all sizes.

If you've had doubts as to whether Salesforce is right for your organization, now is the time to reconsider! Salesforce's newest wave of enhancements has addressed concerns you may have had. More exciting, these upgrades will enable your nonprofit to adapt next-generation technology to your organization's unique needs.

This whitepaper guides you through the essentials for either getting started with Salesforce or taking it to the next level, and how a Salesforce consultant can be a valuable asset in maximizing your success.

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Chapter 1: Leading the Way to A New Level of Impact

Why have so many nonprofits turned to Salesforce? The answer lies in its unique combination of features and its commitment to the nonprofit sector:

- **Powerful and Versatile:** Salesforce offers a robust platform capable of managing various aspects of your organization, from fundraising and donor relations to advocacy, marketing, and program and case management. Its comprehensive features can adapt to your specific needs.
- **Constantly Evolving:** Salesforce is continuously updated with new features and improvements.

- **Next Generation:** You already know that we are moving into a new digital world. Artificial intelligence, data clouds, and powerful new ways to communicate and engage are quickly elevating nonprofit impact. Salesforce for Nonprofits is leading our sector into this next generation.
- **Open and Extensible:** The Salesforce platform is designed to be highly customizable and integrates seamlessly with other applications. This allows you to tailor it precisely to your workflows and expand its functionality as your organization grows.
- **A Supportive Nonprofit Community:** When you choose Salesforce, you join a vibrant and active community dedicated to helping nonprofits succeed. Many nonprofit professionals have acquired Salesforce skills. Many more are learning Salesforce every day. This makes it far easier to recruit the people who can run the systems used in your organization. Resources like the Trailblazer Community, the Power of Us Hub, and regional user groups offer invaluable support, knowledge sharing, and networking opportunities.





Chapter 2: Five Concerns Nonprofits Have About Salesforce, and Why It's Time to Reconsider

Whatever you've heard and whatever your past experience, it's time to give Salesforce a new and closer look. Salesforce for Nonprofits has come a very long way in a very short time.

Let's explore some common misgivings about Salesforce - and why they need to be reconsidered.

Concern 1: "It Feels Too Big and Overwhelming for Our Needs."

Many small and mid-sized nonprofits are using Salesforce with great success, and they're using it in the ways that work best for them. If you're looking to use Salesforce for fundraising only, that's fine. If you want to use it exclusively for program and volunteer management, that's fine, too. Salesforce's flexibility lets you choose what you need. Its broad capabilities then give you the opportunity to tap other features and uses, as you see fit.

Concern 2: "Is Salesforce Really Designed for Nonprofits?"

Salesforce has a deep commitment to nonprofits that goes back decades. The newest Nonprofit application has been designed from the ground up. This allows your organization to manage resource development, volunteers, programs, care, marketing, and communications. It also comes with powerful artificial intelligence and data management features.

Concern 3: "I Tried It Before, and It Didn't Work Out for Me."

Past struggles often indicate incomplete implementation, not a flaw in Salesforce. A **good strategic consultant partner** can tailor the solution and provide essential support.

Concern 4: "My Team Won't Make the Switch."

Change can be tough, but a few proven strategies can help you power through these barriers. Show your team how Salesforce frees up time, start with small wins, empower internal champions, and provide continuous support.

Concern 5: "I'm Worried About the Ongoing Costs."

Yes, you do need to budget for ongoing improvements in how your organization adopts and uses the persistent advances in technology. This is true for nonprofit technology in general. Nonprofits that are doing this in a strategic way are creating better ways to make an impact. They are also finding funders and donors willing to support these ongoing investments.

Ready to harness the full power of Salesforce?

Whether you're just starting out or looking to optimize your current setup, iMission is here to help. Our nonprofit technology experts specialize in strategic implementation, integrations, and ongoing support.

Schedule a free consultation to speak with an iMission Salesforce consultant.



Chapter 3: Getting Started with Salesforce for Your Nonprofit

Ready to take the first steps with Salesforce? Here are some essential tips for nonprofits new to the platform:

- 1. Explore Free Licenses:** Did you know that eligible 501(c)(3) nonprofits can access free Salesforce licenses through the [Power of Us program](#)? This is a fantastic way to begin exploring the platform without a significant initial investment.
- 2. Master the Terminology:** Like any powerful system, Salesforce has its own language. Take the time to learn key terms and concepts to navigate the platform effectively and communicate with other users.

- 3. Focus on Work Processes:** Technology is a tool to get work done, so start by defining the work process you want to improve. Then, ask how technology can help to do it better. Taking this approach will allow you to discover new ways that work can be done.
- 4. Leverage the [Salesforce Nonprofit Community](#):** This online community is specifically for Salesforce.org customers and offers a wealth of resources, including documentation, forums, and support.
- 5. Start Simple, Then Scale:** Don't try to implement everything, all at once. Begin with a core set of features that address your most pressing needs, then gradually expand your usage as your team becomes more comfortable.
- 6. Invest in Training:** Ensure your team receives adequate training on how to use Salesforce effectively. This will maximize adoption and help you realize the platform's full benefits.





Chapter 4: The Strategic Advantage of a Salesforce Nonprofit Consultant

Your days are busy, your work is hectic, and implementing any new technology requires effort. Salesforce is no different. This is where a Salesforce nonprofit consultant can provide invaluable support. Here's how they can help your organization thrive:

Save Time and Money



Consultants bring expertise and experience, allowing for faster and more efficient implementation and customization, ultimately saving you time and resources.

Enhance Effectiveness



Engaging a Salesforce optimization expert can help your nonprofit fine-tune its Salesforce configuration to better reflect your unique objectives and operational processes. This targeted approach results in greater efficiency and a more significant impact.

Tailored Solutions



Consultants understand the unique challenges and opportunities of the nonprofit sector and can configure Salesforce to address your specific needs.

Expertise and Best Practices



They bring a deep understanding of Salesforce best practices and can guide you in implementing solutions that are scalable and sustainable.

Team Training and Adoption



Consultants can provide customized training to your team, ensuring they are proficient in using Salesforce and maximizing its adoption across your organization.



Ongoing Support and Management

They provide ongoing support and assistance with day-to-day management, troubleshooting, and further optimization of your Salesforce instance.



Finding the Right Consultant

When choosing a Salesforce nonprofit consultant, be certain they are registered with Salesforce and have a proven track record of working with organizations like yours.

Kickstart Fundraising Success with SmartStart Accelerator

Our SmartStart Accelerator is the fastest way to launch a Salesforce system tailored to your nonprofit's fundraising needs. From donor tracking to grants management, we'll get you up and running - fast.

[Learn more about SmartStart for Fundraising](#)



Conclusion: Embrace the Future with Salesforce

In today's fast-paced technological landscape, nonprofits looking to profoundly enhance their impact and forge stronger connections with their community will find Salesforce to be a transformative solution.

Whether you're just starting your journey or looking to optimize your existing Salesforce instance, understanding its power and the resources available – including the potential of a dedicated consultant – is key to unlocking your organization's full potential.



Contact Us!

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Mission

Ready to unlock your nonprofit's potential with Salesforce?

We're here to help. At iMission, we specialize in the nonprofit sector and offer expert guidance throughout your Salesforce experience.

How iMission Supports Your Salesforce Success:

- **Tailored Salesforce Strategy:** We craft a unique strategy aligned with your specific wants, needs, and objectives.
- **Smooth Implementation and Setup:** Our experts ensure Salesforce integrates seamlessly with your existing systems.
- **Dedicated Training and Support:** We equip your team with the knowledge and confidence to utilize Salesforce effectively.
- **Continuous Innovation:** We keep you updated on the newest Salesforce features to optimize your platform.

[Partner with iMission today](#) and harness the full potential of Salesforce.