

Salesforce Implementation Plan

6/8/2006

Goal To collaboratively work throughout the organization to implement the use of Salesforce database software in a way that powerfully supports business goals.

About Salesforce: Salesforce.com (Salesforce) is a web-based application that supports constituent relationship management (CRM). Using it effectively will help us communicate with and engage all of the people that we coordinate with, be they financial or material donors, customers, partners, employers, board members or staff. It will help us coordinate our outreach efforts, automate our communication processes and further our organizational goals. While Salesforce (SF) was originally designed for corporate sales departments, the software now meets the needs of a variety of businesses, and the Salesforce Corporation is particularly dedicated to philanthropy, with what they refer to as their “one percent” rule: One percent of all product, profits and personnel shall be devoted to supporting non-profit organizations. This ethic, along with an application that is elegant, accessible, easy to use and remarkably powerful, make Salesforce a great fit for our constituent engagement needs.

Project Scope: While we anticipate using Salesforce to support numerous functions across the organization, we have identified specific goals for the 2007 fiscal year that this project will address. Those goals are to:

1. Introduce the agency to Salesforce: what it is, what it can do, and how it might assist each of us in our efforts at Goodwill;
2. Fully support the current use of Salesforce as a tool to coordinate corporate drives and large material donations;
3. Increase and improve our use of Salesforce as an e-marketing tool;
4. Develop our constituent list in Salesforce and integrate it with our web site;
5. Support Business Engagement staff as they use Salesforce to engage employers;
6. Support Environmental Business staff as they use Salesforce to manage and enhance their business relationships;
7. Support foundation relationship management efforts in Salesforce;
8. Replace ETapestry with Salesforce as our individual donor management system;
9. Develop key dashboards and reports in Salesforce that inform the agency and board of key accomplishments and metrics.
10. Integrate Salesforce and MetSYS data in order to provide comprehensive data on our relationships and effectiveness with employers.

Project Team

Executive Sponsors: The Executive Sponsors approve the Salesforce plan, support the implementation, and promote Salesforce as a strategic tool throughout the organization.

Project Manager: The Project Overseer develops, along with the Project Manager, the overall implementation plan and timeline.

Lead Trainer: The Trainer takes a lead in coordinating the projects. The Lead Trainer offers the frontline training and support to staff using Salesforce.

Digital Marketing Manager: The Lead implementer engages in overall implementation strategies and planning. This person is also responsible for financial donor functions and web site/e-marketing integration.

Salesforce Administrator/Developer: The System Administrator manages accounts and security in the Salesforce application. The Salesforce Developer customizes and develops Salesforce to meet particular organizational needs.

Quality Assurance Manager: The Quality Assurance Manager ensures that proper data standards are maintained by Salesforce users and provides key input into reporting needs. In particular, the QA Manager takes a strong role in defining the metrics that we will use to gauge our success with Salesforce.

As we implement particular projects, key staff involved with those projects will work with and inform the base team.

Plan Assumptions

- Salesforce is understood to be an organization-wide tool that, among many other things, will allow us to maximize our relationships with our numerous constituents by better understanding who they are and how they relate to Goodwill at any point in time. Therefore, while many Salesforce projects will address individual, department and division needs, no Salesforce project is individual, department or division specific. All Salesforce development supports the whole organization's ability to operate.
- Goodwill, as an organization, has the capacity to plan and implement the system-wide and best use of Salesforce software alongside the diverse initiatives and challenges that will be competing for resources throughout the year.
- Goodwill, as an organization, understands the complexities of successful database implementation and will allocate appropriate and ongoing resources to ensure a high probability of success.
- Success of this project will be measured by how well we can use the software to manage and analyze information, communicate effectively and manage our projects in ways that directly support the achievement of each department's goals. (appropriate measures will be developed)

The Plan

The Salesforce projects are broken down into three categories:

1. **Individuals.** Projects involving relationships with individuals, such as individual donors and store customers.
2. **Businesses.** Business to Business projects such as employer engagement and environmental business partnership management.
3. **General.** Assorted Salesforce uses and initiatives, such as e-marketing, dashboard development and system integration.

The following Gantt Chart outlines the projects and timelines for Salesforce implementation. The initial scope of work involves training and customization, and rollout to the donor management and business engagement staff. We will bring in additional, smaller groups over the year, such as Environmental business and customer relations. We will support e-marketing initiatives as they arise all year. In 2007, we plan to significantly develop and integrate Salesforce, building general reports and dashboards and integrating MetSYS and the new web site.

The chart shows system development tasks in blue; training and support tasks in green; report development in orange, and milestones in red. In general, The System Administrator will be the lead on system development, The Lead trainer on training and support, and the Quality Assurance manager, along with the key staff, on report development. Overall, the System Administrator and the team will oversee dashboard and general report development. The Communications Director will work with the System Administrator and the Trainer on e-marketing projects. The Digital Marketing Manager will oversee web site integration, and the Database Administrator will oversee the MetSYS integration.

Basic Timeline:

First Quarter: Roll out Salesforce to Business Engagement, Individual Financial Donor, and Material Donor management staff.

Second Quarter: Continue support and report development for initial rollout, rollout Foundation Management.

Third Quarter: Develop dashboards, begin system integration projects, rollout to Environmental Business staff

Fourth Quarter: Complete Integration projects, continue dashboard development, rollout to Customer Relations staff.

Continuous: Support E-Marketing projects.