NONPROFIT SALESFORCE CONSULTING

AccuFund CRM is a Registered Salesforce Consulting Partner and works exclusively with 501c3 nonprofit organizations. We combine our expertise in Salesforce and database design & optimization to help nonprofit organizations optimize their Salesforce donor management system.

Whether your organization is looking to transition to Salesforce from another donor management solution, or you're looking to bring new life to an existing Salesforce database, AccuFund CRM partners with you to leverage the flexibility of Salesforce to maximize your fundraising and development efforts.

Every nonprofit organization has its own unique set of goals. AccuFund CRM strives to understand these goals to successfully design a database that will help you track, manage, and report on the metrics that represent your unique organizational goals.

OVERVIEW

AccuFund CRM offers a full suite of nonprofit Salesforce consulting services to meet all of your organization's needs.

- **Data Services**
- **System Configuration**
- **Customization and Development**
- **User Training**
- **Advanced Administrator Training**
- **Third Party Application Alignment**
  If your organization has the need for an application from the Salesforce AppExchange, we can assist you in comparing like applications in functionality, integration thoroughness, and price. We work with many applications on a daily basis and can provide feedback based on previous experience and successful integrations.
- **Database Support**

CUSTOMER SUCCESS

TESTIMONIALS

"[AccuFund CRM] has taken the time to get to know our company and our company's desired outcomes, then put in place systems that work for us. Highly detailed and efficient in their vision and the systems they've created for us, the time spent with us took us from very clumsy to proficient. They will remain on speed dial for quite awhile. Night and day difference in our ability to use the CRM with their expert, kind, patient, encouraging help!"

"My compliments to Sarah Finley Burt and the AccuFund CRM team. They set the agency's system up so beautifully and walked me through the whole process. It was seamless and continues to be incredible support. They're the best!"

"AccuFund CRM has truly revolutionized the way we do business by streamlining processes and making us more efficient."

SALESFORCE CONSULTING PROJECT HIGHLIGHTS

Unique organizational needs influence the variety of work we do on behalf of our clients.

Here's a sampling:

- Ful-Functioning Grant Making, Online LOI Accepting, Proposal Analysis database
- Online sign in process for Fund Successor Access and real time review their donor advised and endowment funds and to make grant recommendations.
- Legacy Giving/Planned Giving Management
- Fully automate donations made online to receive an email-acknowledgement and flow into an accounting database as a cash receipt
- Created a custom Holiday Children/Family Adoption Program Management tool
- Inventory Management for CPS like organizations and their in-kind donation available goods
- Volunteer Management to screen online interests and notify staff of certain candidates to contact and screen.

Custom dashboard component set up by AccuFund CRM by allocation for fundraising and accounting auditing and reference.

DISTINCTLY ACCUFUND SALESFORCE CONSULTING

How has AccuFund helped nonprofits be so successful in optimizing their Salesforce system?

FOCUS—Laser focus. We are 100% committed to nonprofits. It's our sole focus and it allows us to have an incredibly deep understanding of the industry. We are Salesforce experts. We are nonprofit experts. We are fund accounting experts. Our focus helps drive your nonprofit's success.

APROACH—We value the relationships we build with each of our clients. Getting to understand your specific mission, organizational goals and objectives, allows us to better design and create the most intelligent Salesforce solution possible.

PARTNERSHIP—We dive deep into the inner workings of your organization; acting as an extension of your staff. This unveils the day-to-day processes, fundraising practices, and staff responsibilities within your organization and allows us to bring creative solutions to solve your unique challenges.

SUPPORT—We continue to work with your staff throughout the implementation process and beyond, educating them not only on how your Salesforce database is built, but also creating teaching opportunities for any appointed database administrators throughout the entire process.

FUNDRAISING & ACCOUNTING INTEGRATION

AccuFund CRM also offers a real time integration with our 5-star rated fund accounting solution.

AccuFund's nonprofit accounting solution offers robust reporting capabilities, dashboards for more informed decisions, as well as add-on modules for any of your organization's unique accounting needs.

Our real-time integration between Salesforce and AccuFund allows our customers to spend less time on data entry and more time engaged with constituents, planning, fundraising, and more.

This integration will also reduce the stress of reconciliation and provide a user-friendly reporting review.

CONTACT ACCUFUND CRM

We are here to help you optimize your Nonprofit Salesforce solution. Please email Sarah Burt at sarahf@accufund.com or call 877-871-2228 Ext. 215.