

idealware



The Landscape of Salesforce Apps

September 2018

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FOREWORD

It's been three years since the last Idealware report on Salesforce applications. Many things remain the same in the market today, but so much has changed for the better. Back in 2015 Salesforce was being rapidly adopted by thousands of smaller organizations, but over these past few years we've seen some of the largest and most sophisticated organizations adopt Salesforce and the effect has been dramatic on our market. Consequently, software companies and independent application developers are providing more options, more innovation, and more expertise that benefit organizations of every size.

Yet undeniably the most significant product changes have been the development of the Nonprofit Cloud, the Education Cloud, and the Philanthropy Cloud by Salesforce.org. These three platforms are robust, with large teams of engineers, product experts, support and client service teams, and some incredibly talented and passionate industry experts blazing the trail.

I'm honored to have found a career helping so many organizations find success with Salesforce. Not a single week has passed where I failed to learn about some great new tool, or application, or enhanced feature that allows us to help our clients. I love following other consultants in the Power of Us Hub and learning from their success. The level of sharing and desire for mutual benefit is inspiring. I can think of no other technology market where so many people are helping each other selflessly. The idiom, "A rising tide lifts all boats" should be the tagline for the Power of Us Hub and the amazing Salesforce community therein. At KELL, we wouldn't be as successful without it.

This guide from Idealware provides a wealth of information on various third-party applications to help complement the Salesforce Clouds, but make no mistake, Salesforce.org is the biggest innovator of them all and will continue to provide solutions to our market. Now with more products and more innovation we have more choices and more opportunities to help nonprofits and educational organizations improve their efficiency, their fundraising, their advocacy, their programs, and their marketing. It's an exciting time to be in this market.

Enjoy this guide, learn from the experts who've help blaze the trails, but be sure to talk with folks who can get to know your needs before you make significant decisions. Whether you speak to a consultant or join the Power of Us Hub and engage the community online, you'll come away from those interactions more informed and hopefully a little bit smarter.

Regards,

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*"The most attentive and responsive staff we've ever worked with."
- Molly Sterns, Global Citizen Year*

*"Affordable solutions even small non-profits can afford."
- Jackie Collete, Marathon Kids*

*"Even before we were officially clients, their customer service was
off the charts. That's priceless."
- Amy Baker, 2Seeds*



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INTRODUCTION

Salesforce is a Cloud-based Constituent Relationship Management (CRM) system used by for-profit businesses and nonprofits of all sizes. As part of its commitment to nonprofits, the vendor offers the same top-tier CRM to nonprofits as its corporate customers, at discounted prices—the company offers 10 free subscription licenses to nonprofits, with additional discounts for organizations whose needs require more licenses or customization.

The flexibility of the platform is part of what makes it a good fit for the nonprofit sector. Organizations can use Salesforce as a simple donor database, or they can fully integrate it into grants programs. Most will want to start with the Nonprofit Success Pack (NPSP), a prepackaged feature-set for nonprofits that the company calls “move-in-ready.” It includes standard features for donor management, email messaging, volunteer management, and case management.

The company also provides training through what it calls “Trailheads,” a robust collection of training modules laid out as a kind of “choose-your-own-adventure” that lets staff members follow their own paths to learn what they need. Steven Fernandez, of GRID Alternatives, a nonprofit that promotes the use of solar energy, says that for him, the Trailheads truly “democratize learning.”

In addition to Trailheads, Salesforce hosts the “Power of Us Hub,” an online community for nonprofit Salesforce users where they can interact with individuals at other organizations using Salesforce to power their nonprofits and share tips and advice and ask and answer each other’s questions.

For many nonprofits, the NPSP may provide all the customization they need. Those who need more are likely to find it in the Salesforce AppExchange, where third-party developers create and sell apps for use in

Because apps allow nonprofits to customize Salesforce without investing in large-scale customization, they’re powerful tools that allow organizations to improve and integrate a Salesforce implementation.

Salesforce. Because apps allow nonprofits to customize Salesforce without investing in large-scale customization, they’re powerful tools that allow organizations to improve and integrate a Salesforce implementation.

Salesforce is not the only CRM on the market, nor is it the only choice for nonprofits. And this report is not designed to convince you to use Salesforce—if you are reading it, chances are that your organization already uses it, or is thinking about making the leap—nor does it explore the features or functions of Salesforce. Instead, we designed this publication to help nonprofits navigate the landscape of apps made available in the AppExchange in an effort to better understand when to use them, how to use them, and which ones might make sense based on their specific needs.

Is Salesforce Right for You?

Like all tools, some organizations may find challenges using Salesforce, including the culture shift that happens within an organization when embarking on something new and different. Adopting Salesforce as your organization's CRM requires a commitment to learning, care, and maintenance, and a shift in mentality in the organization.

"You can't approach Salesforce with the same mindset you would an Excel Spreadsheet," said Steven Fernandez, of GRID Alternatives.

Other challenges include the following:

Preparing (and Paying) Up-Front. For nonprofits, the NPSP is a great place to start. But if your organization's needs go beyond the NPSP, there will be work to do to lay the proper foundation. It will take preparation, time, and maybe even money (even though the licenses may be free). Your organization needs to prepare for the changes. That means getting buy-in from a number of stakeholders throughout the organization—not just the IT department.

"When we invest in planning, and engage users during the process, they are more likely to be open to the culture change ahead," said Ilene Weismehl, knowledge and database manager at Community Catalyst.

There is no doubt that Salesforce gives nonprofits a deep discount and incredible value. But an organization may need to spend more time and money up-front, and it may take time to see that value. When budgeting, take up-front costs into account but look to the long-term.

Lack of Documentation + Turnover = Problems. A common refrain among Salesforce consultants and users is the number of organizations that abandon the platform, thinking it too-complicated a tool. More often than not, though, the problem is a lack of documentation and training. With a tool as customizable as Salesforce, everyone involved knows and understand why certain decisions are made. It is vital to have processes around Salesforce documentation throughout implementation and changes. Documentation is especially important for nonprofits that may experience higher-than-average turnover. Doubly important is keeping staff up-to-date and trained on changes.

ABOUT SALESFORCE APPS

As already mentioned, third-party apps give Salesforce functionality and integrations that are not part of the core product. As a nonprofit, your Salesforce licenses may be free, but the apps you need to make your implementation work the way you want it to may not be. Built using the Force.com platform, these apps vary in cost from free to over \$15,000 per year. Because they're add-ons that you seek out and implement on your own, they're not included in the initial cost of the Salesforce platform. (For more information on pricing, see the full listing of apps on page 16). But the additional functionality they can bring makes them a powerful option well worth exploring.

Whatever your organization's particular requirements are, if Salesforce doesn't support them, look to the AppExchange—someone may have already built an answer to the problem.

There are two types of apps we'll be talking about in this report: native apps, and integrated third-party apps. Let's take a look at the difference between the two.

Native Apps

Native Apps are designed to be used in Salesforce without requiring users to log in to a separate account or website. Once installed, they blend more or less seamlessly into your Salesforce experience. Native Apps are not necessarily better or worse than integrated third-party apps—the advantage is that they have fewer moving parts since they are housed entirely within Salesforce, and, for the most part, only go down when Salesforce itself is down.

Integrated Third-Party Apps

Integrated third-party apps are built by developers, hosted outside of the Salesforce platform, and integrated with Salesforce using integration apps. It is important to research these tools as well as the vendors who make them. Some have close-knit integration with Salesforce, but many of their core functions will live outside of the Salesforce ecosystem. Assess the roadmap and reliability of these tools separately from Salesforce.

Do I Need an App for That?

If you're new to Salesforce, it can be tempting to run through the AppExchange and install every app about which you are curious.

Fight the temptation. Be strategic. Ask yourself the following questions:

Can We Already Do This?

If you have a need, you may be able find an app to meet it—but does Salesforce (and especially the NPSP) already meet this need? Many organizations can use the CRM's core functionality to meet their Volunteer Management and Community Building needs, even if it takes a little setup work.

Can Another App do This?

If you're currently using a tool that you'd like to keep using, you might find that the vendor has an app version in the AppExchange that lets you use it in Salesforce—but you might not. Don't worry, you don't have to abandon the tools you rely on. Consider employing an automation or integration tool (see page 20 for a sample list) that lets you integrate instead.

Can I Use an API?

Salesforce has a robust Application Programmer Interface, or API, which consists of routines and protocols that allow for sharing and displaying data. (As a simple example, if you have ever embedded a Twitter Feed on your website, you have used the Twitter API.) Once the realm of complex software interactions, APIs are now commonplace. Most online software applications have some sort of API that allow you to share and display data—if the tool you want to integrate also has one, consider creating a simple API integration.

WHAT TO LOOK FOR IN AN APP

With so many apps available on the AppExchange—more than 3,000 in all—navigating through them can be daunting. There are a few ways to narrow down your choices, including giving some careful consideration to the criteria detailed below.

Company Reliability

Technology changes fast, and it's a competitive marketplace. Companies come, companies go. Before purchasing an app, consider the vendor—how long have they been around, and is it likely they will they still be around five years from now?

Innovation

Some established companies put a lot of effort into R&D and working with new technology. Others may have a solid reputation, but have not tried anything new in 15 years. Some younger companies are willing to take risks on innovative technologies. If your organization wants to be on the cutting edge of innovation and technology, be willing to trade a little risk for something new that can really help you get ahead.

Reviews and Last-Updated Schedule

In the AppExchange, you will find app reviews and information about the last time each app was updated. While it's worth taking this information into consideration, it should be secondary to the other methods you use to choose an app. Many apps, especially those used by the nonprofit community, don't receive a lot of reviews, and other apps that are simple connectors may not need to be updated that often.

Test Drives

Many Salesforce apps may offer free trials. Before you invest in one, see if you can test it out first to make sure it is a good fit for your organization.

Word-of-Mouth

The nonprofit Salesforce community is robust. If you are wondering about an app, ask about it—a good place to start is the Power of Us Hub. You can also look for Meetups and user groups in your area. Some questions to ask include the following:

- How smooth was installation and integration?
- Has your “up time” been satisfactory?
- Have you needed a lot of customer service? If yes, how does the company respond?
- Have your stakeholders been able to adjust to the tool?

USE CASES

A Salesforce implementation complemented by apps will look different for different kinds of organizations. In this section, we provide a few examples of typical ecosystems based on each nonprofit's needs. These are not prescriptive—don't use them as recipes or shopping lists. Instead, use them as inspiration to help you think through your needs and what might be possible for your organization.

"We are a large national nonprofit with several field offices across the country. We offer local services to individuals with disabilities within the community. There is a lot of paperwork involved with this."

Salesforce is well-equipped to handle the national office/field office relationships. Unless your situation is truly unique, it is unlikely you will need an additional app to manage it. Here are the situations in which you may want to consider an app:

- **Your field offices are all using different tools, or they input information a little bit differently.** In that case, you will want to look into data hygiene, integration, and automation tools. Data hygiene [p 21] apps will make your data consistent. Integration apps [p 20] can get data across a series of different tools and get them into Salesforce in a consistent manner. If you have a very large organization, you may need to look at more advanced, higher-end tools.
- **You need an integrated case management tool to integrate with Salesforce.** All organizations that offer services are different. But when it comes

to case management needs, they also have a lot in common. There are case management apps [p 22] built for organizations that offer community services.

- **You need your constituents to receive and sign documents.** Offering services comes with a lot of paperwork. Look into document creation [p 23] apps to create those documents, and document signature apps to manage the signature and activation process.

"As an organization, we have made a commitment to use open source tools. Are there specific nonprofit tools that are open source that will work well with Salesforce?"

Some organizations have a strong commitment to tools developed on open source platforms. On the AppExchange, both Soapbox Engage and Jackson River's Springboard platform offer a variety of nonprofit tools that integrate with Salesforce—Soapbox is built on the Joomla! Open Source platform, Springboard on Drupal.

The toolsets include:

- A fundraising platform
- Events management
- Email marketing
- Form creation
- Advocacy tools
- eCommerce store

“We are a mid-size nonprofit with one year left on our contract for our online donation platform. It’s a decent tool, but we’re committed to Salesforce, and want to make sure all tools have a seamless integration.”

Start with your current donation platform. Ask if it has any Salesforce integration. Even if it doesn’t have an app, the vendor may have made a connector before. If it has, talk to other organizations that have used it before. See what the ups and downs have been.

If you go with a new tool, there are many fundraising platforms with integration apps [p 16]. But think about your requirements before you jump in: What do you need? If you only need straight donations, there are several basic tools that can do the trick. If you need monthly giving and peer-to-peer fundraising, your needs may be a little bit more advanced.

“We have several small organizations coming together to form a coalition and have agreed to use Salesforce for our constituent database. Each organization is going to turn over its constituent information from its CRM. When we communicate with our constituents, we want a consistent and united presence. We’re concerned about overlap within the organizations. The last thing we want to do is to appear disorganized.”

To merge a lot of data into a single database, start with a deduplication tool [p 21]. Since you are starting from scratch, you may be able to get by with one of the less expensive ones.

Look only to integrate the bare minimum you need for consistent communication. For ongoing maintenance consider an integration and automation tool [p 20] that can help automate and standardize

Finally, look for a well-integrated email marketing tool. Many of the more popular email tools also have decent apps and connectors in Salesforce [p 18].

What Have You Heard About MailChimp?

MailChimp is one of the most popular email marketing tools on the market, and with so many features and flexible pricing, it’s a darling of the nonprofit community. But nearly everyone we spoke to said MailChimp’s Salesforce app stopped working a few months ago.

Some of them indicated that, in their opinion, MailChimp did not make fixing this issue a high priority. Others said that some problems have still not been fully resolved. One organization even said it may abandon MailChimp altogether, while others were instead looking to automation tools like Workato and Zapier to fill in the gaps left by the breakdown.

Idealware has not verified these claims, nor have we spoken to MailChimp. But we’ve heard from enough people we trust that we wanted to raise the issue. If you’re using or considering MailChimp and Salesforce together, we recommend researching the tool and speaking to other organizations and the vendors.

“As an organization, we’ve found the all-in-one nonprofit platform we’ve been using hasn’t been meeting our needs. We are considering switching to best-in-breed tools. How can we ensure that the multiple tools we use will integrate seamlessly and accurately in Salesforce?”

You will need to exercise a little diligence. Once you have determined that a tool will meet your needs, consider the following:

- What is the vendor’s commitment to Salesforce integration?
- Is integration a key part of its business model?
- If not, does it have a robust API? Do you have the technical resources at hand to create your own connector?

- If not, do you have an automation or integration app already [p 20] that may be able to handle the issue without a separate app or API integration?

Once you have your tools integrated in Salesforce, you will want to make sure your data remains clean and accurate. Choose a data app [p 21] to maintain good data hygiene.

“We are a large professional association that manages training and certifications for our membership through a best-in-breed Learning Management System (LMS). We cannot easily get this data to integrate in our Association Management System (AMS). Instead, we’d like Salesforce to take in the AMS data on membership and marry it to data from the LMS.”

Many associations consider their AMS their primary CRM, and may not need Salesforce or any other database. But others have a more diverse set of needs, or struggle to get full integration in a proprietary AMS. For those organizations, Salesforce can help create excellent reports and a united view.

Several AMS and LMS solutions offer Salesforce integrations. Some have apps. Others just create connectors with the API. Ask your current AMS and LMS providers if they have an app or offer such an integration [AMS: p 25, LMS: p 24].

“We are a very small, volunteer-driven grassroots organization. We need to be able to organize quickly when events on the ground demand it. We want to take donations, but can’t afford a donation platform.”

Volunteers For Salesforce is Salesforce.org’s native plugin for volunteer management, and it works very well. The Salesforce Community Cloud tools are also usually sufficient for all kinds of organizations. A small organization with a good Salesforce foundation may not require any additional apps.

If traditional donation platforms are out of reach, consider using a Forms tool, such as Form Assembly, attached to a payment connector—this combination won’t offer a lot of flexibility, but it will allow you to take in money.

“We’re a loosely connected professional organization that currently tracks everything in an Excel spreadsheet. We also have a Slack channel and a Facebook Group.”

Salesforce comes with a social contacts feature to help convert social media activity into households. Many productivity and collaboration tools, like Slack, have their own app. You can also use an automation tool like Zapier. Search through the AppExchange to see if there is an integration and automation that can suit your needs (p 20).

“We are a nonprofit that fundraises through donations. But we’re thinking of opening an eCommerce store to sell some branded merchandise. How can we get eCommerce data into Salesforce?”

There are a few native eCommerce apps in Salesforce. In 2017, Salesforce purchased the eCommerce solution CloudCraze. But that tool may be a bit much for a small- or mid-sized nonprofit. Fonteva, which also has membership and association apps, has a Salesforce app as well, but is also expensive.

If you already have nonprofit tools, look to see if they also offer eCommerce solutions. Many all-in-one solutions include some sort of eCommerce module.

You can look outside of Salesforce and use such popular eCommerce platforms as Shopify or Magento. Neither tool offers its own Salesforce App, but some third-party software developers have created their own. Alternatively, an automation and integration app like Workato or Zapier [p 20] may get the job done.

“We are a mid-sized, local nonprofit. Every year, we host a major fundraising gala. We want event management software that will integrate with Salesforce so traditional fundraising and event data are side-by-side.”

Many all-in-one nonprofit platforms offer events registration and management [p 18]. If you use one of those platforms, you may already have access to an events module that may meet your needs and can integrate with Salesforce.

If you prefer working with a separate events tool, there are several with strong Salesforce integrations, such as Linvio events. If your organization wants to use a best-in-breed tool that doesn't have an app, you still have options. Even without an app, it may work with some of the many automation tools that work well with Salesforce [p 20].

SALESFORCE APPS

As previously mentioned, there are currently more than 3,000 apps in the Salesforce AppExchange. This is not meant to be an exhaustive list—rather, we spoke to a number of subject matter experts and nonprofit staff members and asked them which apps they most often recommend and most often use for typical nonprofit use cases, including those discussed in the last chapter. Idealware has not tested these apps, and cannot verify their vendors' claims. Other apps may meet your needs as well or better. As with any software selection, due diligence is critical to the process for a successful implementation and adoption. This list is just a good place to get you started.

A Note About Pricing: The cost of an app can vary wildly for an app or service depending on the size and need of your organization. We determined the relative cost by comparing the item to other tools within the category. For integrated platforms, the cost includes the cost of the app and the cost of the platform. If a tool has a per-user cost, we assume an organization would need three-to-five user licenses.

- \$=Free, or among the lower priced apps in the category (usually \$0-\$2,000 per year).
- \$\$=The median-priced item in the category (usually \$2,000-\$5,000 per year).
- \$\$\$=The highest-priced app in the category (\$5,000+ per year).
- ?=Pricing Unavailable

Fundraising

Estimated Price Range (Annual): \$1,000-\$15,000 (depending on total money raised).

App	Description	Price Range	Website
Causeview Fundraising	Use this app for excellent donor management within Salesforce. You can also create your own donation forms and place them on your website through an iFrame.	\$	https://www.causeview.com/fundraising/
Classy	Classy is a full-service donation platform. It has recently made improvements to its integration. For very specific needs, though, it can sometimes be difficult to customize.	\$\$	https://www.classy.org/tour/classy-salesforce-integration
Click & Pledge	Click and Pledge is a fundraising tool with a highly recommended Salesforce integration. It also handles events very well.	\$\$\$	https://clickandpledge.com/products/donor-management-salesforce/
Cloud for Good	Cloud for Good is a fundraising tool and consultancy for nonprofits and educational organizations. The tool was meant to work directly with Salesforce. The vendor offers a variety of apps within Salesforce to integrate with its tools.	?	https://cloud4good.com/

App	Description	Price Range	Website
DonorDrive Peer-to-peer Fundraising	DonorDrive offers a Salesforce a free integration app with its peer-to-peer fundraising tools.	?	https://www.donordrive.com/solutions/peer-to-peer-fundraising-software/
Form Assembly	Form Assembly is a fast and simple form creation tool. It has an excellent Salesforce integration. You can use payment connectors to gather payments, making it an excellent, low-cost alternative to larger donation platforms.	\$	https://www.formassembly.com/salesforce/
FunRaise Connect	The online platform offers donation forms, peer-to-peer fundraising, and donor management. The Salesforce connector app is free for use with the platform.	\$\$	https://www.funraise.io/
iDonate Digital Fundraising	iDonate bills itself as a donor engagement platform. It also has a Salesforce App integration.	?	https://idonate.com/
Kimbia	An online giving platform that specializes in Giving Days and Peer-to-Peer fundraising. Kimbia also offers everyday giving and events. The Salesforce app does synching.	\$\$	https://kimbia.com/
Luminate CRM	Luminate CRM is Blackbaud's Salesforce-based CRM that connects to the Luminate Suite of online tools. This is an excellent option to consider if you already use the Luminate Suite.	\$\$\$	https://www.blackbaud.com/fundraising-crm/luminate-crm
MobileCause CRM	The mobile fundraising tool has a CRM Connector.	\$\$	https://www.mobilecause.com/integrations/salesforce/
NGO Connect	RoundCorner offers NGO for donor management and constituent engagement. The tool comes with a Salesforce integration.	\$\$\$	https://roundcorner.com/ngo-connect/
Rallybound	A fundraising tool that specializes in peer-to-peer fundraising for campaigns and events.	?	https://rallybound.com/rallybound-salesforce-integration
Soapbox Engage	Run by PicNet, Soapbox Engage Products are built on a Joomla base, and are built to work seamlessly with Salesforce.	\$\$	https://www.soapboxengage.com/
Springboard	Springboard is an all-in-one tool for nonprofits created by the consultants at Jackson River. Built on Drupal, it is highly customizable.	\$\$\$	https://www.jacksonriver.com/springboard/springboard-features

Events

Estimated Price Range (Annual): \$2,500-\$10,000

App	Description	Price Range	Website
Causeview Fundraising	Use this app for excellent donor management within Salesforce. You can also create your own donation forms and place them on your website through an iFrame.	\$	https://www.causeview.com/fundraising/
Classy	Classy is a full-service donation platform. It has recently made improvements to its integration. For very specific needs, though, it can sometimes be difficult to customize.	\$\$	https://www.classy.org/tour/classy-salesforce-integration
Click & Pledge	Click & Pledge is fundraising tool with a highly recommended Salesforce integration. It also handles events very well.	\$\$\$	https://clickandpledge.com/products/donor-management-salesforce/
Luminate CRM	Luminate CRM is Blackbaud's Salesforce-based CRM that connects to the Luminate Suite of online tools. This is an excellent option to consider if you already use the Luminate Suite.	\$\$\$	https://www.blackbaud.com/fundraising-crm/luminate-crm
Linvio Events	Online registration and attendee management. Linio offers a special nonprofit bundle. The payment connect tool also offers support for virtual terminals.	\$	https://www.linvio.com/portfolio/linvio-events/
Soapbox Engage	Run by PicNet, Soapbox Engage Products are built on a Joomla base, and are built to work seamlessly with Salesforce.	\$\$	https://www.soapboxengage.com/
Springboard	Springboard is an all-in-one tool for nonprofits created by the consultants at Jackson River. Built on Drupal, it is highly customizable.	\$\$\$	https://www.jacksonriver.com/springboard/springboard-features

Email Marketing & Marketing Automation

Estimated Price Range (Annual): \$250-\$15,000

App	Description	Price Range	Website
Soapbox Mailer	Part of the Soapbox Engage suite of tools, only it is a Native App within Salesforce.	\$	http://www.soapboxmailer.com/
MailChimp	MailChimp is one of the best known email marketing tools out there. But recently its app integrations have been problematic for some users (see page 13).	\$\$	https://mailchimp.com/help/integrate-salesforce-with-mailchimp/
Constant Contact	Constant Contact is well-known email marketing tool with an integration app.	\$\$	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003Hn2zEAC
Pardot	Pardot is a marketing automation tool with email marketing features. It has a highly recommended Salesforce integration. Pricing is based on list size.	\$\$\$	https://www.pardot.com/

App	Description	Price Range	Website
Luminate CRM	Luminate CRM is Blackbaud's Salesforce-based CRM that connects to the Luminate Suite of online tools. This is an excellent option to consider if you already use the Luminate Suite.	\$\$\$	https://www.blackbaud.com/fundraising-crm/luminate-crm
Springboard	Springboard is an all-in-one tool for nonprofits created by the consultants at Jackson River. Built on Drupal, it is highly customizable.	\$\$\$	https://www.jacksonriver.com/springboard/springboard-features
VerticalReponse	This email marketing tool offers an app for Salesforce integration. Discounts are available for nonprofits, and pricing is based on list size. The various tiers of service offer different backend reporting capabilities. The two-way integration app is free with use of the Pro version and higher.	\$	https://www.verticalresponse.com/integrations/salesforce
iContact	An email marketing tool that lives solely in Salesforce.	\$	https://www.icontact.com/solutions/salesforce

Advocacy

Estimated Price Range (Annual): \$4,000-\$15,000

App	Description	Price Range	Website
CQ Engage	CQ Engage is a commonly used advocacy platform for nonprofits. The app will sync CQ Engage activity directly into your Salesforce Household activity. Pricing varies depending on the tools you use in CQ Engage.	\$\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3000000B519uEAB
KnowWho	KnowWho is an advocacy tool that keeps up-to-date directory information for elected officials, federal officials, and more. It also allows you to create dynamic Action Centers and mapping software.	\$\$	https://kw1.knowwho.com/store/by-platform/salesforce-CRM/
Luminate CRM	Luminate CRM is Blackbaud's Salesforce-based CRM that connects to the Luminate Suite of online tools. This is an excellent option to consider if you already use the Luminate Suite.	\$\$\$	https://www.blackbaud.com/fundraising-crm/luminate-crm
Soapbox Engage	Run by PicNet, Soapbox Engage Products are built on a Joomla base, and are built to work seamlessly with Salesforce.	\$\$	https://www.soapboxengage.com/
Springboard	Springboard is an all-in-one tool for nonprofits created by the consultants at Jackson River. Built on Drupal, it is highly customizable.	\$\$\$	https://www.jacksonriver.com/springboard/springboard-features

eCommerce

Estimated Price Range (Annual): \$5,000-\$30,000

App	Description	Price Range	Website
CloudCraze	Now a Salesforce company, CloudCraze's native app gives you eCommerce right in Salesforce.	?	https://cloudcraze.com/
CloudGento	This is a two-way sync tool between Shopify and Magento.	\$\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003I1WZEA4
eShopSync for Shopify	This is a simple Shopify connector.	\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EvAhBUAV
Fonteva eCommerce	In addition to its membership offering, Fonteva offers a complete eCommerce package.	\$\$\$	https://www.fonteva.com/ecommerce/
Luminate CRM	Luminate CRM is Blackbaud's Salesforce-based CRM that connects to the Luminate Suite of online tools. This is an excellent option to consider if you already use the Luminate Suite.	\$\$	https://www.blackbaud.com/fundraising-crm/luminate-crm
Soapbox Engage	Run by PicNet, Soapbox Engage Products are built on a Joomla base, and are built to work seamlessly with Salesforce.	\$\$	https://www.soapboxengage.com/

Integration & Automation

Estimated Price Range (Annual): \$500-\$21,000

App	Description	Price Range	Website
Boomi	A Dell product, Boomi offers Salesforce integrations using a drag and drop tool.	\$\$	https://boomi.com/platform/integrate/applications/salesforce/
Cazoomi	Cazoomi integrates external tools with Salesforce.	\$	https://www.cazoomi.com/syncapps/salesforce-to-act-on/
dataloader.io	Dataloader.io is the popular Salesforce tool produced by MuleSoft. There is a free tier. (Pricing reflects the Professional tier.)	\$\$	https://dataloader.io
Jitterbit	Jitterbit is a tool that integrates through creating APIs on its custom platform. Discounts available for nonprofits.	\$\$\$	https://www.jitterbit.com/solutions/salesforce-integration/
Simple Data Import Tool	This tool moves contacts from other CRMs into Salesforce. Cost depends on the number of records.	\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000009vGZUEA2

App	Description	Price Range	Website
Workato	Workato syncs your external systems with Salesforce. If your favorite tool doesn't have a Salesforce integration, chances are, Workato can handle it. It has a separate synch for EventBrite, which is a common events tool used by nonprofits.	\$\$\$	https://www.workato.com/integrations/salesforce
Zapier	Zapier is a world-class automation tool in which you use triggers and outcomes to create "Zaps." If someone signs up for your email list, for example, you can trigger that to add a record in Salesforce.	\$	https://zapier.com/help/salesforce/

Project Management

Estimated Price Range (Annual): \$0-\$7,500

App	Description	Price Range	Website
Cloud Coach	This is a popular project management tool for Salesforce. There are several tiers of services that increase in complexity of project management needs. The "Milestones" app is simple and free.	\$\$	https://cloudcoach.com/
Milestones PM	An incredibly light and simple project management tool.	\$	https://appexchange.salesforce.com/appxListingDetail?listingId=aON30000003ltrEEAS
Quip	Quip is a collaboration tool, purchased by Salesforce in 2016. It integrates with G Suite. There are several ways you can use Quip with Salesforce. You can import Salesforce data within Quip.	\$\$\$	https://quip.com/

Data Hygiene

Estimated Price Range (Annual): \$0-\$7,500

App	Description	Price Range	Website
Apsona	Apsona is one of the more popular tools for data management, report, and document creation. It also offers some special tools for nonprofits, including batch gift entry.	\$\$	https://apsona.com/pages/sfdc/index.html
CloudDingo	An all-in-one deduping and data hygiene tool.	\$\$	https://clouddingo.com/
Conga Sign	Used with Conga Composer, Conga Signature works within Salesforce to get documents signed.	\$\$	https://getconga.com/products/esignature/sign/
DocuSign	DocuSign is the standard for collecting electronic signatures. You will need to pay for DocuSign, as well as the DocuSign for Salesforce connector.	\$\$	https://www.docusign.com/partner/docusign-salesforce

App	Description	Price Range	Website
Duplicate Check	This simple tool finds, prevents, and merges duplicates. A limited free version is available.	\$	https://duplicatecheck.com/
Field Trip	Field trip is a great tool to stop your Salesforce implementation from becoming too unwieldy. It allows you to run reports on how often fields are used. That way, you can better train on or get rid of fields that aren't being used.	\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003HSXEEA4
Nintex	Nintex purchased the popular mail merge tool, DrawLoop. To use it, you purchase the Nintex suite of tools, which also includes automation workflows. Because you now own the suite, the price has increased dramatically.	\$\$\$	https://www.nintex.com/workflow-automation/salesforce/
ValidityConnect	Validity recently purchased DemandTools, which many nonprofits were pleased with. Validity's new pricing model has put it out of the price range of many nonprofits (though it does offer a discount). But the tool is still strong.	\$\$\$	https://www.validity.com/

Case And Program Management

Estimated Price Range (Annual): \$9,000-\$25,000

App	Description	Price Range	Website
Amplify Impact	From Vera Solutions, this tool can help with outcomes reporting for programs.	\$\$\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000F2aLTUAZ
Circe	Circe offers case management for nonprofits and social services.	\$\$	http://circesoftware.net/
Cloud for Good	Cloud for Good is a fundraising tool and consultancy for nonprofits and educational organizations. The tool was meant to work directly with Salesforce. The vendor offers a variety of apps within Salesforce to integrate with its tools.	?	https://cloud4good.com/
Exponent Case Management	Exponent Partners created Exponent Case Management for Salesforce.	\$\$	https://www.exponentpartners.com/nonprofit-salesforce-implementations/exponent-case-management/
FoundationConnect	RoundCorner created FoundationConnect to specifically help Foundations and Grants-based organizations.	\$	https://roundcorner.com/foundationconnect/

Form Creation

Estimated Price Range (Annual): \$1,00-\$15,000

App	Description	Price Range	Website
Form Assembly	Form Assembly is a fast and simple form creation tool. It has an excellent Salesforce integration. You can use payment connectors to gather payments, making it an excellent, low-cost alternative to larger donation platforms.	\$	https://www.formassembly.com/salesforce/
Luminate CRM	Luminate CRM is Blackbaud's Salesforce-based CRM that connects to the Luminate Suite of online tools. This is an excellent option to consider if you already use the Luminate Suite.	\$\$\$	https://www.blackbaud.com/fundraising-crm/luminate-crm
Soapbox Engage	Run by PicNet, Soapbox Engage Products are built on a Joomla base, and are built to work seamlessly with Salesforce.	\$\$	https://www.soapboxengage.com/

Mail Merge/Document Creation

Estimated Price Range (Annual): \$800-\$10,000

App	Description	Price Range	Website
Conga Composer	Conga Composer allows you to make quick and easy documents based on data within Salesforce.	\$\$	https://getconga.com/products/document-generation/composer/
DocoMotion	Mail Merge tool that allows you to create documents. Discounts available for nonprofits.	\$	https://www.docomotion.com/
Nintex	Nintex purchased the popular mail merge tool, DrawLoop. To use it, you purchase the Nintex suite of tools, which also includes automation workflows. Because you now own the suite, the price has increased dramatically.	\$\$\$	https://www.nintex.com/workflow-automation/salesforce/
WebMerge	Another popular mail merge tool for the creation of documents. Pricing is based on the number of documents you need to create per month.	\$	https://www.webmerge.me/#

Social Tools

Estimated Price Range (Annual): \$0-\$22,000

App	Description	Price Range	website
Salesforce for Hootsuite	Hootsuite is a popular social Media tool for nonprofits. If you are lucky enough to be using the enterprise editions of both Hootsuite and Salesforce, you can add records from Hootsuite into Salesforce.	\$\$\$	http://apps.hootsuite.com/284/salesforce
Slack	Slack is a popular online collaboration and chat tool. The cost varies widely, from free to enterprise level.	\$	https://get.slack.help/hc/en-us/articles/227838227-Salesforce-for-Slack

Apps for Education Management and Learning Management Systems (LMS)

Estimated Price Range (Annual): \$10,000-\$25,000

App	Description	Price Range	website
Cloud for Good	Cloud for Good is a fundraising tool and consultancy for nonprofits and educational organizations. The tool was meant to work directly with Salesforce. The vendor offers a variety of apps within Salesforce to integrate with its tools.	?	https://cloud4good.com/
Co-Pilot by College Forward	This app is for educational institutions and nonprofits. It is meant to track student information in order to get them through the college application process.	\$\$	https://appexchange.salesforce.com/appxListingDetail?listingId=aON3000000B5WHcEAN
Cornerstone LMS	A native Salesforce app specializing in employee, partner, and volunteer training. Pricing is per user (\$3 per month), making it reasonably priced for smaller projects.	\$\$	https://www.cornerstoneondemand.com/
Enlighten CRM	If you use a traditional LMS like Moodle, Totara, or Blackboard, this app enables you to integrate data from those tools into Salesforce. Pricing starts at \$10 per user per year, making it reasonably priced for smaller projects.	\$	https://www.envisiontel.com/enlighten-suite/
LearnTrac	This native Salesforce App adds an LMS Object. It is simple and reviews indicate it is easy-to-use. The app appears to be free to use.	\$	http://www.appinium.com/learn-trac/
TargetX	A CRM tool that specializes in recruitment and retention in higher education.	?	https://www.targetx.com/

Association Management

Estimated Price Range (Annual): \$2,000-\$10,000

App	Description	Price Range	website
Fonteva Membership	Fonteva is Membership management built with associations in mind. Discounts for nonprofits.	\$\$\$	https://www.fonteva.com/membership/
NimbleAMS	An association management tool built on the Force.com platform.	\$	https://www.nimbleuser.com/

Apps for Niche Markets

Estimated Price Range (Annual): \$2,000-\$8,000

App	Description	Price Range	website
Congregation Connect	A congregation management tool with a history of Salesforce support.	\$	http://congregationconnect.com/products/salesforce-the-connected-platform/
PatronManager	Built on Salesforce, this ticketing system works well for performing arts nonprofits that have events and seating. It can also handle fundraising.	?	https://patronmanager.com/
Veevart	Salesforce-based application for museums, galleries, and cultural institutions.	\$\$	https://www.veevart.com/

Other

Estimated Price Range (Annual): \$0-\$20,000

App	Description	Price Range	website
Auctions for Salesforce	Created by DJH Consulting, this software allows you to integrate auction information (attendees, tickets, donors, and more) in with Salesforce. The tool is free to use.	\$	https://djhconsulting.com/auctions-for-salesforce/
Board Action Plan	This tool gives analytics reports and tasks to your board members.	\$	https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EjMGYUA3
FinancialForce	Financial force is an accounting system that offers a suite of tools that integrates with Salesforce.	\$\$\$	https://www.financialforce.com/
Fundraising Analytics	This new app was is part of Salesforce Labs. It uses Einstein Analytics to help develop insights.	\$	https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EcslwUAJ
GridBuddy	This is a simple tool that makes complex interfaces in Salesforce a little bit simpler. Its purpose is to increase productivity.	\$\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003IkInEAK
Rollup Helper	Rollup helper allows you to create reports that might otherwise require custom coding or complex workarounds in Salesforce.	\$\$\$	https://www.passagetech.com/rollup-helper-overview
Sage	Sage is accounting software with plans for a variety of organization sizes.	\$\$\$	https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3000000DXznREAT
WealthEngine Connector	WealthEngine integrates the tool's trove of information into Salesforce.	\$\$	https://www.wealthengine.com/products-services/products/wealthengine-salesforce

CONCLUSION

Depending on your organization's particular needs, implementing Salesforce can be a relatively simple process or a long and intricate one. With the array of choices to make, both within Salesforce itself and the third-party apps in the AppExchange, you could easily start to feel overwhelmed. This publication should help you navigate these complexities as you move forward with an implementation that does what you want it to do.

If you want more help, there are a number of nonprofit technology consultants with a wide range of expertise assisting nonprofits with Salesforce implementations and apps. To help you find them, we've included a directory, which begins on page 36. These consultants paid to be included in this directory, which, along with the generosity of our sponsors, helps Idealware fund the research involved in putting together this publication.

This report is not meant to be the last word on Salesforce apps, nor is it meant to be a shopping list for apps that will help you meet your needs. Rather, it's meant to be the beginning of a conversation you should have with the key stakeholders in your organization who use Salesforce and those who benefit from the CRM's capabilities. That conversation should also include the vendors of the apps in which you're interested, and possibly even consultants with experience assisting organizations like yours with similar requirements.

Whichever path you choose, remember, a thoughtful and strategic approach can go a long way toward ensuring that you select the best apps for your needs, saving you time, money, and frustration down the road.

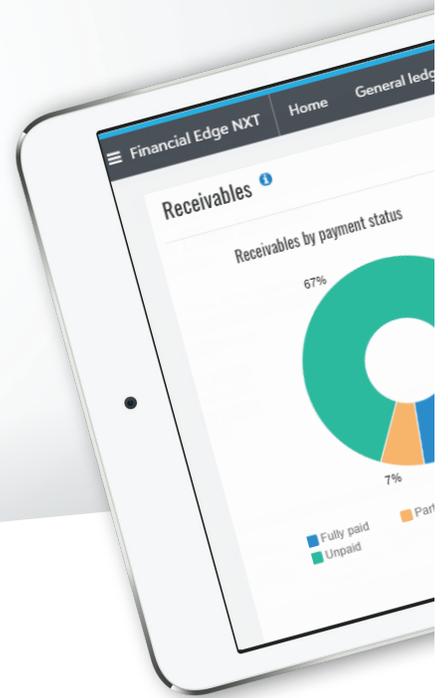
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Gregg Bossen, CPA
Owner/Consultant





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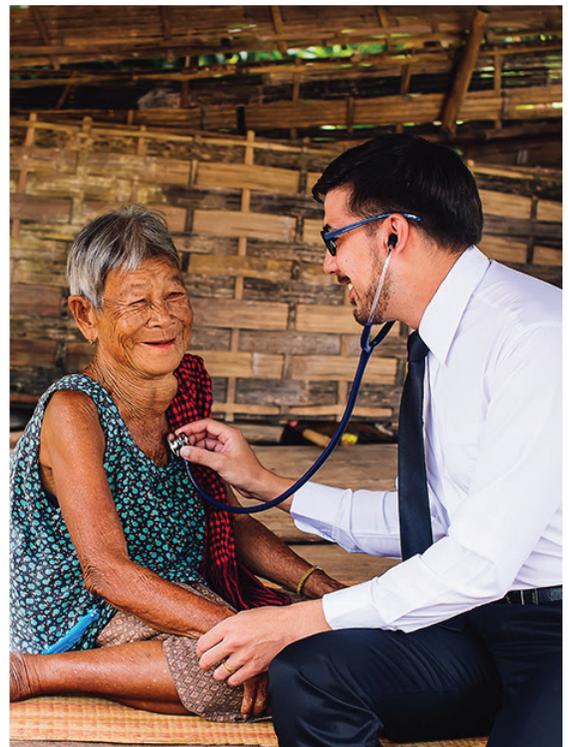
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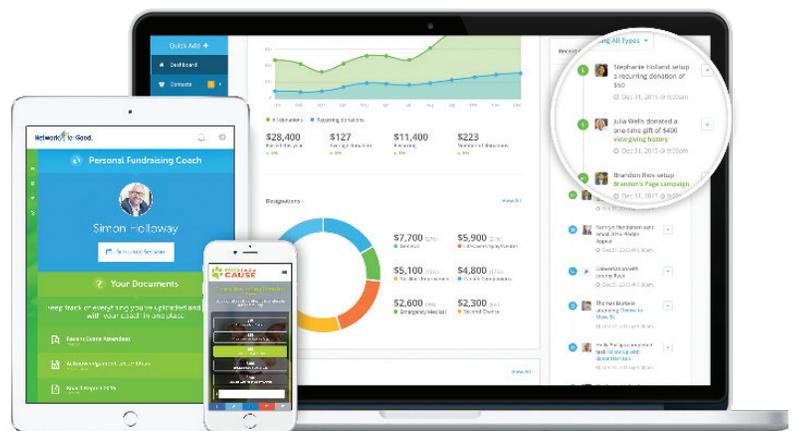
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APPENDICES

APPENDIX A: ADDITIONAL RESOURCES

For more information you might find helpful, refer to the following resources:

- **Salesforce App Exchange**
<https://appexchange.salesforce.com/appxstore>
- **Trailhead: Salesforce Basics for Nonprofits**
https://trailhead.salesforce.com/en/modules/nonprofit_salesforce_basics.
- **Now it Matters Blog**
<https://www.nowitmatters.com/blog/>
- **Salesforce API Documentation**
<https://developer.salesforce.com/docs/api-explorer>
- **SalesForce Power of Us Hub**
<http://www.salesforce.org/help/power-of-us-hub/>
- **Kell Partners Blog**
<https://www.kellpartners.com/blog>
- **Soapbox Engage Blog**
<https://www.soapboxengage.com/blog>
- **Salesforce.org Events**
<http://www.salesforce.org/events/>
- **Salesforce.org User Groups**
<http://www.salesforce.org/help/user-groups/>

APPENDIX B: METHODOLOGY

Note that Idealware did not test the apps included in this report, and cannot verify vendor claims about their abilities. This report is not a review of those apps, nor are they the only apps available to meet the nonprofit needs identified in this report.

How did we arrive at the list of apps included here? We began with the list of apps included in the first two editions of this publication, and conducted desk research into whether they were still available and actively in use. Then we conducted targeted searches on the AppExchange looking for new, popular, and/or well-reviewed apps in particular categories.

To augment that desk research, we spoke to several nonprofit consultants who specialize in Salesforce and asked them about the apps they most commonly recommend and most commonly use for nonprofit implementations. If they mentioned an app, it made our list. Then we spoke to several nonprofit staff members who use Salesforce on a regular basis and asked them about the apps they most commonly use for a variety of use cases. If they mentioned an app, it made our list.

Finally, we asked some of our subject matter experts to review an early draft of the report for accuracy and anything we might have missed.

APPENDIX C: ABOUT THIS REPORT

About the Authors

Marissa Goldsmith, Idealware Contractor

Marissa Goldsmith is a digital analytics specialist from Northern Virginia. She has been making websites for more than 20 years. She made her first website in Pico; most people viewed it in Lynx. Today, she works with nonprofits, government agencies, and small businesses, implementing digital data collection strategies, integrations, and helping them to use the data gleaned in a privacy-friendly way. When she's not elbow-deep in spreadsheets (and loving it!), her side-passion is accessibility.

Chris Bernard, Research and Editorial Director

Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. Since 2007 he has overseen Idealware's editorial and communications efforts, driving the creation and publication of more than a hundred articles, reports, and other resources and managing the communications calendar.

About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart decisions about technology. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit www.idealware.org to learn more or view our hundreds of free articles, resources, and reports.

Contributors

This report would not be possible without the input and generosity of the following subject matter experts who volunteered their time:

- **Steven Fernandez.** COO, GRID Alternatives.
- **Karene-Sean Hines.** Educator, James T Timmelty Middle School, Roxbury, MA.
- **Eric Magnuson.** Director of Solutions Engineering, Exponent Partners.
- **Ryan Ozimek.** Founder and CEO, PicNet.
- **Michelle Regal.** Director of Operations, Now it Matters.
- **Tompkins Spann.** COO, KELL Partners.
- **Ilene Weismehl.** Knowledge & Database Manager, Community Catalyst.

APPENDIX D: ABOUT OUR SPONSORS

KELL Partners

KELL has helped over 1,000 nonprofits and educational organizations successfully implement Salesforce, and would love to help you too. They'll help you navigate your options and prescribe a solution plan to match your needs, budget and timeline. And when you're ready to manage more of your mission with Salesforce, they can help you navigate the path between add-on apps and custom code to match your program needs and resources. They've helped hundreds of nonprofits realize the potential of an organization-wide CRM strategy. For more information, visit www.kellpartners.com.

Twilio

Twilio.org is the social impact arm of Twilio, the leading platform for voice, SMS, and video communications. They connect social impact organizations, passionate software developers, and the full power of the Twilio platform to ignite positive change on a local to global scale. For more information, visit www.twilio.org.

PicNet

PICnet has spent the past decade helping organizations of all sizes more effectively use Salesforce for online fundraising, event registrations, advocacy, and marketing. With Salesforce certified experts and online engagement gurus on staff, they take a holistic approach to empowering organizations with services that result in moving the needle in the direction of higher levels of effectiveness. Accidental techie friendly, they aim to help organizations at every part of their Salesforce journey raise more money and change the world. For more information, visit www.picnet.net.

DIRECTORY OF SALESFORCE CONSULTANTS

CONSULTANT DIRECTORY

Company	Description	Service Area(s)	Contact
BrightStep Partners www.brightsteppartners.com	BrightStep Partners is a boutique strategy and implementation firm for nonprofit organizations considering, implementing and using the Salesforce.com platform. We specialize in delivering solutions for environmental, justice and advocacy organizations.	United States	Megan Himan info@brightsteppartners.com (214)748-3647
Cathexis Partners www.cathexispartners.com	Founded in 2008, Cathexis Partners helps nonprofit organizations implement and use technology to raise funds and spread the word about their mission more effectively and more efficiently.	North America	Mark Becker mark@cathexispartners.com (214)748-3647
Cornershop Creative cornershopcreative.com	Cornershop Creative is an award-winning online services company committed to listening carefully to our nonprofit and small business clients. We're all about helping organizations make the most of the web. Whether your goals are in fundraising, advocacy, sales, or engagement, our team has the technical experience to make it happen... and the communication skills to make it fun!	US	Lesley Molecke hello@cornershopcreative.com (214)748-3647
Database Designs www.dbdes.com	Personalized attention based on many years experience: technology strategy, values-driven and theory of change-based planning, thoughtful implementation, existing system rescue and renewal. Get in touch to start the conversation.	Massachusetts, New England & National	Steve Backman steve@dbdes.com (617)423-6355
Do Big Things www.dobigthings.today	At Do Big Things, we do digital differently. We create content, ads and websites that are human-centered, engaging, and authentic—and we constantly test and adapt our approach using the latest cutting-edge technology and data. Our work is always grounded in behavioral science, and our developers are experts in deploying AI, machine learning, and blockchain to run the dynamic digital programs & infrastructure our clients need to make a difference in the world.	Domestic US and Global	Cheryl Contee info@dobigthings.com (415)997-9231
DonorSearch donorsearch.net	DonorSearch has the largest and fastest growing charitable and political giving database. We guide you to philanthropists first and then look for other wealth indicators second. Now, you can conduct prospect research right within Salesforce with 5-star rated DonorSearch 360io app. Join the hundreds of nonprofits using our Salesforce integration today!	Entire US	Andy Suther Andy@donorsearch.net (214)748-3647

Company	Description	Service Area(s)	Contact
Exponent Partners www.exponentpartners.com	We build whole organization solutions on the Salesforce platform to help nonprofits in Education, Human Services, and Philanthropy make social change by measuring outcomes and impact. We unify—"in one system—"your data, program, communications, back-office functions and fundraising. The resulting solution supports your processes and enables you to improve performance across your organization.	US and Canada	Susan Tobes info@exponentpartners.com (800)918-2917
Fionta www.fionta.com	Fionta is a Salesforce, web design and development and technology consulting company, created in 2001 specifically to serve nonprofits. Fionta is a Salesforce.org Premium Partner with expertise in serving the needs of nonprofit organizations, associations, and foundations with the Nonprofit Success Pack (NPSP), Community Cloud, Pardot, and Marketing Cloud. Since 2001, Fionta has provided services to almost 1,000 nonprofit organizations of varying sizes. We maintain an excellent rating on the Salesforce AppExchange for our service, and our web design practice has been recognized with dozens of awards. Additionally, you'll find us at nonprofit conferences giving presentations frequently.	United States and Canada	Fionta info@fionta.com (202)296-4065
Forum One forumone.com	Forum One is a full-service digital agency that creates powerful end-to-end digital experiences for mission-driven organizations. In addition to design, development and data services, the Forum One team works with nonprofits to help them to set up, manage, integrate and optimize Salesforce into their digital ecosystem. Clients include: the Bill & Melinda Gates Foundation, Save the Children, the Smithsonian Institution, the American Red Cross, and She Should Run.	USA: Washington DC, Seattle WA, New York NY, Boston MA, Chicago IL, Portland OR, San Francisco CA, Los Angeles CA	Christina Crawley inquiries@forumone.com (703)548-1855
KELL Partners www.kellpartners.com	KELL Partners is a consulting firm specializing in Salesforce solutions for nonprofits and educational institutions. We've helped over 1,000 organizations implement and train on the Salesforce platform. Our services include KELL360™, Marketing Cloud implementation, application development, data migration, system integration and ongoing managed services. We provide the expertise to set up and configure Salesforce, along with the hands-on training and ongoing support to ensure your success.	United States and Canada	info@kellpartners.com (512)851-8411

Company	Description	Service Area(s)	Contact
Longshore Consulting www.longshoreconsulting.com	<p>Longshore Consulting is a social sector Salesforce consulting firm with a collaborative approach. Leveraging 19 years of experience working with nonprofits and foundations, and nine years in practice customizing and extending the use of Salesforce, Longshore Consulting is a dedicated partner to make data management worries a thing of the past.</p> <p>Longshore Consulting offers a variety of high quality services at an affordable rate, including: project management, training, salesforce CRM implementation, coaching & capacity building of staff, best practice recommendations, and customization.</p> <p>If you're looking for high quality Salesforce success services, schedule a consultation today.</p>	United States	Missy Longshore missy@longshoreconsulting.com (415)730-8580
North Peak www.northpeak.com	North Peak helps nonprofits, foundations and associations elevate their efforts using Salesforce solutions.	United States	Brian Pickett brian.pickett@northpeak.com (858)345-6173
PICnet www.picnet.net	PICnet has spent the past decade helping organizations of all sizes more effectively use Salesforce for online fundraising, event registrations, advocacy, and marketing. With Salesforce certified experts and online engagement gurus on staff, they take a holistic approach to empowering organizations with services that result in moving the needle in the direction of higher levels of effectiveness. Accidental techie friendly, they aim to help organizations at every part of their Salesforce journey raise more money and change the world.	United States and Canada	Ryan Ozimek info@picnet.net (202)585-0232
roundCorner www.roundcorner.com	roundCorner delivers Salesforce-based fundraising and grants management software and services for enterprise nonprofits and foundations. We help our customers unlock faster time to value in the cloud by reimagining the world's leading CRM platform - Salesforce.com - for constituent-centric organizations. roundCorner is a Salesforce Platinum ISV Partner.	North America	Dan Lamot info@roundcorner.com (610)996-6007
SoPact www.sopact.com	SoPact is a leader in Salesforce ecosystem & impact measurement & reporting with 175+ engineers ready to provide professional services in * Impact Measurement * Outcome Measurement * Impact Reporting * Data Architecture * Data Services * Salesforce Heroku * Salesforce Integration * Salesforce Development * Salesforce UX/UI * Social Media & Marketing Technology * CRM * Nonprofit Services	Global	Unmesh Sheth unmesh@sopact.com (214)748-3647

Company	Description	Service Area(s)	Contact
Swift River Consulting www.swiftriverconsulting.com	Helping nonprofits navigate the rapids of technology using Salesforce.org's Nonprofit Success Pack, custom implementations, data migrations, system upgrades/audits, strategy, training and support packages. 15+ years of platform expertise!	United States; UK/EU, SE Asia, Japan	Meghan Morrison info@swiftriverconsulting.com (415)547-0630
Yurgosky www.yurgoskyconsulting.com	Yurgosky is the premier technology, strategy, and analytics company serving nonprofits. We work with many of the largest and most innovative nonprofits in the world to identify and build data-focused technology that conserves more land, engages more volunteers, families and students, raises more money, and delivers more comprehensive services to communities. Our mission is to transform our clients so much that they can't imagine a better way of operating.	NYC, US, Global	Patrick Yurgosky info@yurgoskyconsulting.com (718)392-3085