

PRO-TIPS

# 6 SIGNS IT'S TIME TO MAKE THE MOVE TO SALESFORCE

KELL  
PARTNERS

**You know your nonprofit needs a better way to manage information. You've seen what other orgs can do with data, and your system doesn't measure up. But, for whatever reason, you're stuck in the status quo.**

Maybe that inertia means your system works fine for your needs. Or maybe you're holding yourself back from a new era of relationship-building, data-splicing and more.

At KELL Partners, we've helped hundreds of nonprofits transition to Salesforce, and we know the platform's full potential. Here we've compiled a list of the most common signs that the time has come to make the big move.



# 1



**SIDE TIP:**  
List all the ways that constituents fuel your success.

## YOU CAN'T VISUALIZE YOUR SUPPORTERS

People don't just support nonprofits through donations. They attend events, volunteer, subscribe to newsletters, buy t-shirts and more. A CRM that doesn't show all the ways constituents interact with you has fundamental flaws.

Your database may be holding you back in a number of ways, including communication. You can't possibly treat your constituents with the gratitude they deserve if you're only looking at their donations.

Salesforce allows you to track multiple characteristics of engagement and integrates with popular email marketing platforms. You can create a one-to-one communication strategy informed by a constituent's full participation.



2

**SIDE TIP:**

List all the different places you store information.

## YOUR SYSTEMS AREN'T ON SPEAKING TERMS

Some nonprofits have more than one database to track constituents and transactions. Some use a mixture of spreadsheets and other files. These pockets of information are “data siloes,” and they’re bad news.

When your various ways of managing information don’t talk to one another, that slows down your staff. They probably struggle to share information about the programs through which you achieve your mission.

Although you may have survived this way for a long time, you probably also know that something is missing. Trust us. That missing piece is cohesiveness.



3



**SIDE TIP:**  
Ask staff to estimate how much time the system wastes.

## ADMINISTRIVIA BOGS DOWN YOUR STAFF

Does your development staff waste time manually piecing together reports, rather than crafting brilliant campaigns? Is your IT team bogged down with support requests, rather than building innovative donor interfaces? Burnout may be on the way.

Your database should empower your work, not demand your attention. If your tools weigh you down, it may be time to cut and run.

The Salesforce Nonprofit Success Pack has many compatible applications that you can install and configure. This seamless integration results in automated data entry [and quick, accurate reports]. And user-driven resources, such as the [Power of Us Hub](#), mean easy access to support.

# 4

**SIDE TIP:**

Evaluate your constituents' intersections with the system.



## THE SYSTEM ANNOYS YOUR CONSTITUENTS

If online payments take donors off your site, or if your volunteers must call in to sign up for shifts, some would-be supporters are dropping off. **[There's no doubt.]**

With Salesforce Community and selection of a payment process that has a Salesforce application, volunteers could register through a customized online portal that's supported by automated email confirmations and reminders. KELL Partners found that one client, after implementing such a system, experienced a 76% increase in new volunteers [and wasted a lot less time on the phone].

Salesforce also enables online payment systems to be embedded within your website. So donating to a nonprofit is a smooth [and not-at-all annoying] process.



## YOU'RE BURNING MONEY ON MONTHLY FEES

Did you know that the Salesforce Foundation offers 10 free Enterprise Edition licenses to nonprofit organizations?

If you're paying thousands of dollars a year for a CRM, plus payment processors and costly add-ons, you may very well incur significant cost savings by migrating to Salesforce.

It's important to compare your five-year costs for staying with your current system versus moving to Salesforce.

Although the first year may bring implementation costs, after that it's just licensing for any nifty apps to flesh out your system. Ask KELL for an estimate.

**SIDE TIP:**

Get Our 5 Year Salesforce Cost Calculator

[DOWNLOAD HERE](#)



# 6

**SIDE TIP:**  
KELL can  
help you  
develop  
your five-year  
outlook. Give us a call.

## THE SUN IS SETTING ON YOUR SYSTEM

It happens all the time with software that's not mainstream. Either the product is going away entirely, or the parent company decides to stop developing it and providing support. [Bye-bye bug fixes. Hello, crashes.]

Your database may be holding you back in a number of ways, including communication. You can't possibly treat your constituents with the gratitude they deserve if you're only looking at their donations.

Salesforce allows you to track multiple characteristics of engagement and integrates with popular email marketing platforms. You can create a one-to-one communication strategy informed by a constituent's full participation.



## About KELL Partners

KELL Partners is a consulting firm specializing in Salesforce solutions for nonprofits.

KELL Partners has helped over 900 nonprofits implement and train on the Salesforce platform. With services ranging from KELL360™ to implementations with complex custom needs, application development and data migrations. KELL Partners provides the expertise to set up and configure Salesforce, along with the hands-on training, guidance, ongoing support and consulting nonprofits need to ensure success.

## We want to hear from you!

If you want the lowdown on services, solutions, support and all the red-tape defying feats we can do for orgs like yours, get in touch.

**512.850.KELL (5355)**

**INFO@KELLPARTNERS.COM**

**KELLPARTNERS.COM**