

PRO-TIPS 

5

TIPS FOR EFFECTIVE

Salesforce User Adoption for Nonprofits

 KELL
PARTNERS

One of the most commonly overlooked components when a nonprofit organization is implementing **Salesforce** (or any new system or process for that matter) is **user**

adoption. You can invest all of the time and money in the world into building out a new system, but if your users are not on board, the project cannot be successful! A CRM is only as useful as the people that use it and the data that is put into it.

SO HOW DO YOU FIX THAT?

Here are 5 key tips to making sure your users are ready (and incentivized) to use your new system before you go live.

1

MAKE SURE THAT THERE IS VALUE IN THE SYSTEM FOR THE PEOPLE WHO ARE DOING DATA ENTRY (NOT JUST FOR MANAGEMENT OR THE BOARD OF DIRECTORS).

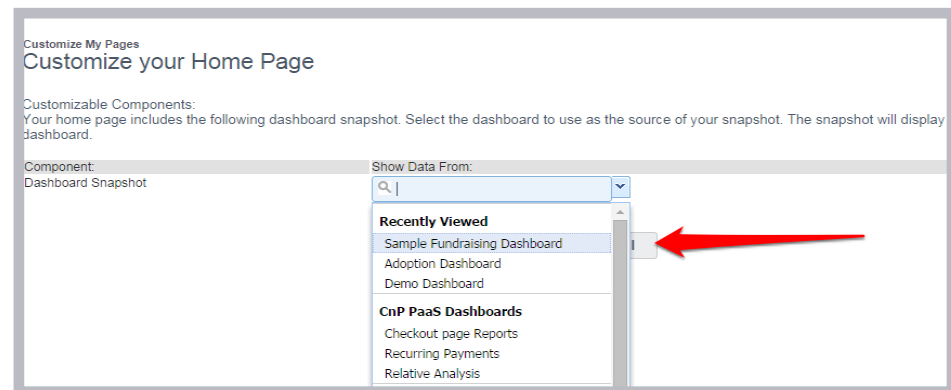
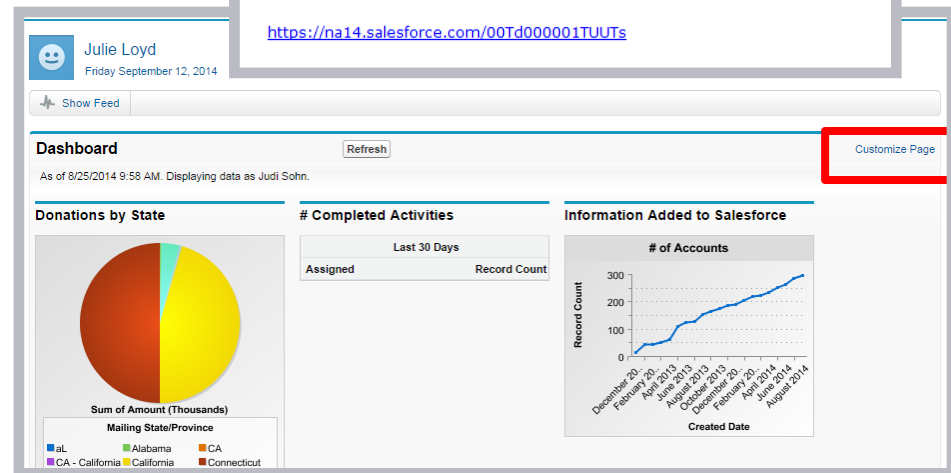
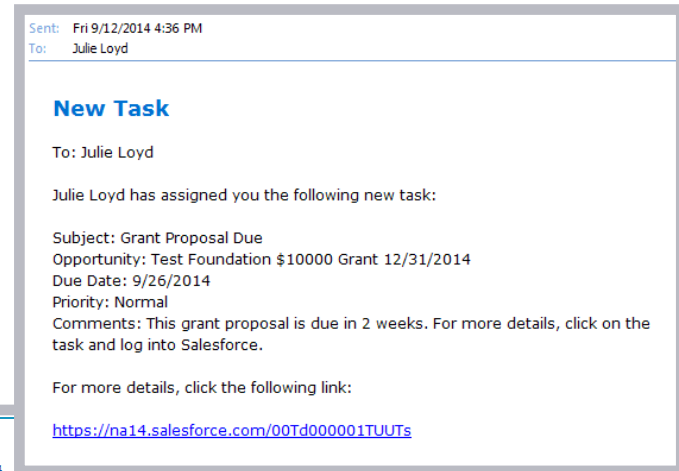
Often when systems are being designed, the focus is on outputs. For example, clients ask themselves “what do we need to be able to track in order to send the appropriate reports to our Funders?” or, “what needs to be entered monthly in order to run this report for the Executive Director or President?”

Those things are very important, but it's also important to think about how your new system can be configured to make life easier for those entering the data. That way, they are more likely to enter it regularly and accurately.

5 TIPS FOR EFFECTIVE SALESFORCE USER ADOPTION FOR NONPROFITS

Here are some quick ways to configure your Salesforce instance to encourage user adoption without a large budget or even a high-level of technical expertise:

- **Create workflow rules that send reminders to users when it's time for them to do something important.** Some examples are things like reminders for submitting a grant proposal, or generating a thank you note or making a phone call to a donor.
- **Set up useful reports that help end users to do their jobs more efficiently.** For example, a report that shows all grants that have proposals due in the next 3 months, a list of major gift opportunities in certain stages with the donor's contact information, or tasks that are overdue. You can even [schedule these reports to be emailed](#) to any user on a schedule.
- **Create a dashboard that shows key metrics that users will find interesting.** Each user can select which dashboard they want to see on their homepage each time they log in. For example, donations by state, total number of grant opportunities, number of volunteers and total volunteer hours by month.



2

MAKE SURE YOU HAVE MANAGER BUY-IN.

Ask managers to incorporate the use of Salesforce into **check-in meetings** and **annual reviews** so that it becomes a normal part of staff members' jobs. If people are not held accountable for using the system, then it won't be considered important. Help your organization's managers by asking them what metrics they use in staff reviews and see how you can incorporate them into Salesforce.

[Here are some metric and goal setting ideas to consider for user adoption >](#)



3

OFFER INCENTIVES TO USERS WHO ARE SALESFORCE “SUPERSTARS.”

This will appeal to everyone's natural competitive nature. Maybe it's a monthly Starbucks gift card to the person who enters the most (x) or (y). Or perhaps you send them to additional training if they master certain skills sets. And don't forget to ask to them share their knowledge with the rest of the staff and showcase their skills for professional development. You can get creative with this one!

[Check out even more user adoption reward and incentive ideas here >](#)



4

CREATE DASHBOARDS/REPORTS THAT ARE VISIBLE TO EVERYONE.

This will also appeal to everyone's natural competitive nature. Just be sure it's not in a way that shames people who are taking longer to get up-to-speed. There are [free dashboards](#) that you can install from the AppExchange, and then modify to your needs.

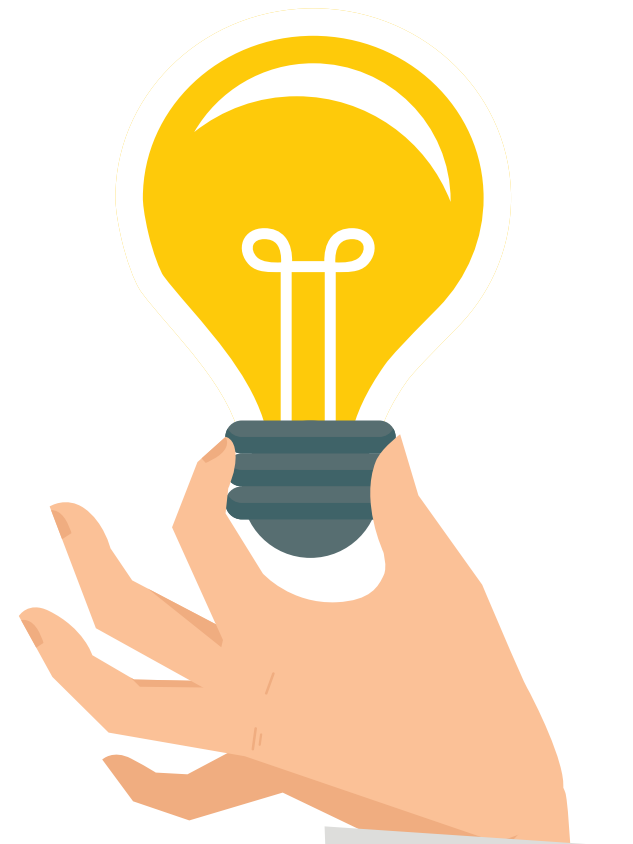
[Here's an example of one.](#) Or, you can build one from scratch that's customized for your organization.



5

GROW YOUR OWN SKILL SET ABOUT USER ADOPTION.

If you're attending Dreamforce this year (and we think you should!), look for sessions that have the word "Adoption" in the name. If you aren't attending, you can search these [Salesforce User Adoption Resources](#), check out [related videos on YouTube](#), or just try googling keywords like "Salesforce + user adoption" to find lots of other great ideas!





About KELL Partners

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

KELL Partners has helped over 800+ nonprofits implement and train on the Salesforce platform. With services ranging from Quickstart to custom implementations with complex data migrations. KELL Partners provides the expertise to setup and configure Salesforce, along with the hands-on training, guidance and consulting you 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.

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