What You Need to Know About Salesforce for Nonprofits 2024

Salesforce Ben LinkedIn Live

April 4, 2024

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Salesforce for Nonprofits: What You Need to Know in 2024

By **Watt Hamlett**
March 15, 2024

The past twelve months have been a period of many changes in the Salesforce ecosystem for nonprofits. If you are a casual observer, you may have missed some altogether. Even if you are

Source: *Salesforce Ben*

HELPING ORGANIZATIONS NAVIGATE AND SUCCEED IN THE SALESFORCE ECOSYSTEM

WHAT WE DO

For Nonprofits

We specialize in independent strategic guidance and advisory services on all things Salesforce. Whether you are considering a move to Salesforce or considering your next move with an existing Salesforce solution, let us be your guide.

For Salesforce Partners

We specialize in helping businesses establish and grow their presence in the Salesforce.org ecosystem. Whether you are a long-time Salesforce.org partner or just looking to explore the market, let us help you serve the sector more effectively.

For Both: Watt's List

Watt's List is an online directory of Salesforce consulting firms and independent consultants, helping nonprofits find their best-fit Salesforce consulting resources, and helping nonprofit-focused Salesforce consultants get found by their best-fit clients.
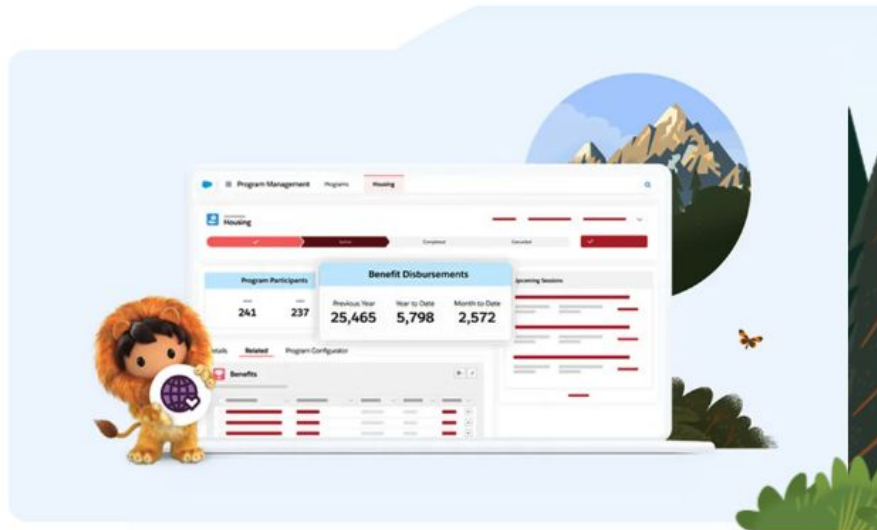
www.watthamlettconsulting.com

Product

Nonprofit Cloud: Is it a good thing?

Yes!

- **Cross-industry innovation**
- **Continued sector investment**

But...

- **Cost:** More expensive
- **Complexity:** Double-edged sword
- **Compatibility:** With how nonprofits work and with third-party apps
- **Confusion:** Product announcements, training and support resources, online forums, ISV apps, consulting services, and staff skills.
- **Conversion:** Full migration for current customers

WHC

NPSP vs. NPC: Overview

Overview	NPSP	NPC
CRM for fundraising, program management, case management, and grantmaking	Yes	Yes
Delivered via	Managed Packages ("on top of" Salesforce)	Core platform ("in" Salesforce)

NPSP vs. NPC: Features

Features	NPSP	NPC
Fundraising	Included	Included
Program Management	Free add-on	Included
Case Management	Paid add-on	Included
Grantmaking	Free/paid add-on	Paid edition
Accounting Subledger	Paid add-on	Included
Outcomes Management	Unavailable	Included

NPSP vs. NPC: Additional Functionality

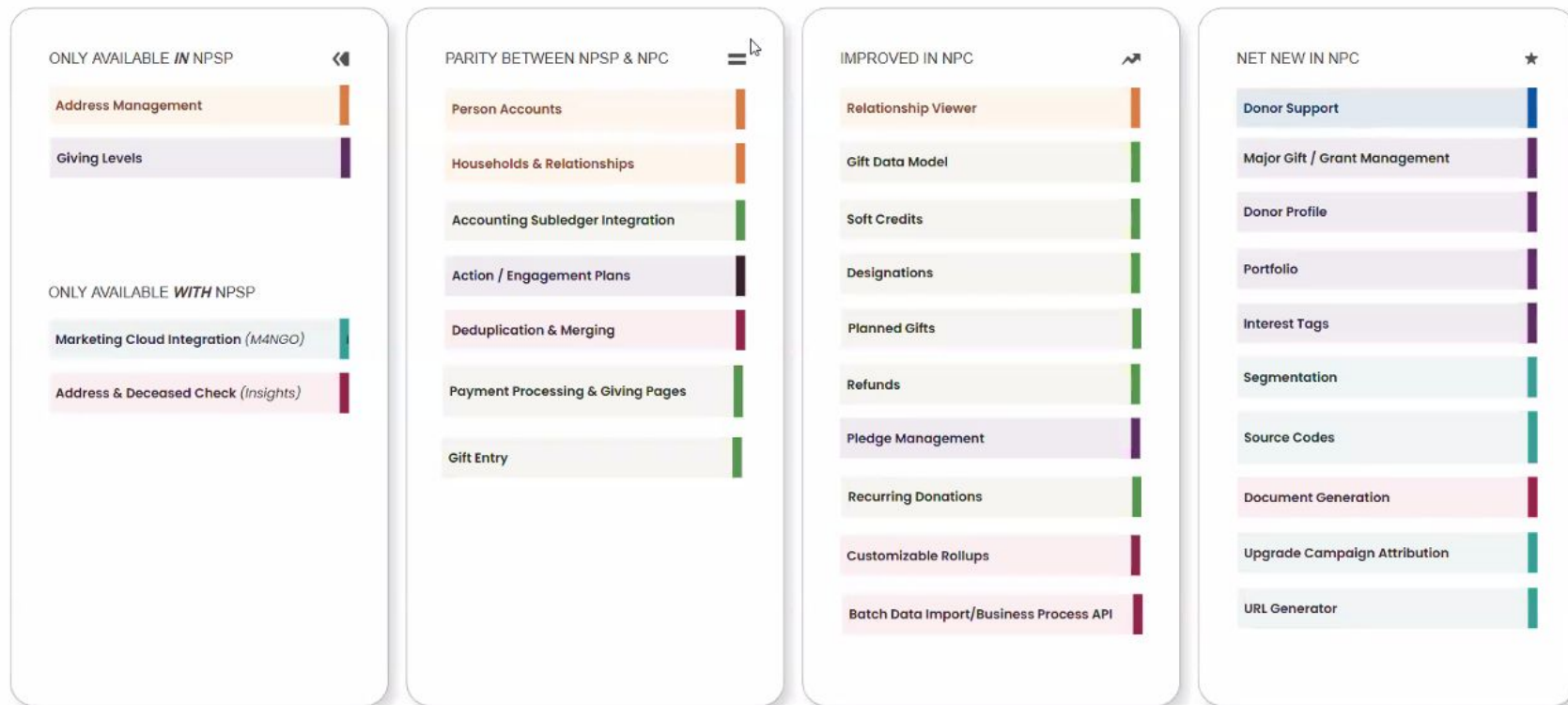| Additional Functionality	NPSP	NPC
Experience Cloud / Portals	Add-on	Add-on
Email Marketing	Add-on	Add-on
Online giving	Add-on	Add-on
Event Management	Add-on	Add-on
Volunteer Management	Add-on	Add-on

NPSP vs. NPC: Cost

Cost	NPSP	NPC
10 Free Licenses	Yes	Yes*
Lowest cost license (Enterprise Edition)	$36/user/month	$60/user/month

*Salesforce does not offer 10 free licenses for NPC Grantmaking

Comparing NPSP & NPC Fundraising Features

High level overview

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ONLY AVAILABLE *IN* NPSP ⟪

- Address Management
- Giving Levels

ONLY AVAILABLE *WITH* NPSP

- Marketing Cloud Integration (M4NGO)
- Address & Deceased Check (Insights)

PARITY BETWEEN NPSP & NPC ☰

- Person Accounts
- Households & Relationships
- Accounting Subledger Integration
- Action / Engagement Plans
- Deduplication & Merging
- Payment Processing & Giving Pages
- Gift Entry

IMPROVED IN NPC ↗

- Relationship Viewer
- Gift Data Model
- Soft Credits
- Designations
- Planned Gifts
- Refunds
- Pledge Management
- Recurring Donations
- Customizable Rollups
- Batch Data Import/Business Process API

NET NEW IN NPC ★

- Donor Support
- Major Gift / Grant Management
- Donor Profile
- Portfolio
- Interest Tags
- Segmentation
- Source Codes
- Document Generation
- Upgrade Campaign Attribution
- URL Generator

| Constituent Management | Gift/Financial Management | High Touch Fundraising | Mass Market Fundraising | Data & Admin Tools | Donor Support |

Source: NPSP or NPC: Deciding Between Nonprofit Success Pack and Nonprofit Cloud

Implement: Get Started

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- 12 Nonprofit Cloud AddOns
- 13 Migration Planning and Support*

*only for existing NPSP Customers

Requires Premier or Signature Success

Implement: Get Started

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- 9 OmniStudio
- 10 Data Processing Engine
- 11 Business Rules Engine

Requires Premier or Signature Success

Implement: Get Started

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- 6 Grantmaking*

*only for Nonprofit Cloud Grantmaking

- 7 Accounting Subledger
- 8 Industry Common Components

Requires Premier or Signature Success

Implement: Get Started

salesforce

- 4 Outcome Management
- 5 Fundraising

Requires Premier or Signature Success

Implement: Get Started

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- 2 Program Management
- 3 Case Management

Requires Premier or Signature Success

Implement: Get Started

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1 **Get to Know Salesforce for Nonprofits**

TRAILHEAD	TRAILHEAD	ARTICLE	DOCUMENTATION ★	GUIDE
Salesforce for Nonprofits Basics	**Explore Nonprofit Cloud**	**Nonprofit Cloud DataSheet**	**Learn about Nonprofit Cloud**	**Nonprofit Cloud Developer Guide**
Get to know Nonprofit Cloud and other solutions to power your mission.	Learn how you can fund, deliver, and measure impact with Nonprofit Cloud.	An overview of the core capabilities delivered within Nonprofit Cloud.	Nonprofit Cloud includes Case Management, Program Management, Fundraising, and Outcome Management and is your one-stop-shop for features created using the power of the Salesforce platform.	Refer to these resources to learn about the Nonprofit Cloud objects, data model, apex methods, and other product components.

SITE	DOCUMENTATION	TRAILHEAD	DOCUMENTATION	DOCUMENTATION
Explore the New Nonprofit Cloud for 30 Days	**Nonprofit Cloud Release Notes**	**Stakeholder Management in Nonprofit Cloud**	**Group Membership and Households**	**Group Membership and Your Cloud**
Get hands-on experience with Nonprofit Cloud in a full-featured trial experience (Learning Org).	Brief, high-level descriptions of enhancements and new features.	Manage individuals, households, organizations, and the relationships between them.	Set up standard objects and guided flows to create and define groups of individuals, such as households.	Explore examples of how to model relationships in your Nonprofit and understand how to map different types of households and groups.

GUIDE	COMMUNITY
Build an Integration Strategy like a Customer Success Architect (CSA)	**Nonprofit Cloud New Group**
Develop a strategy for integrating your systems with Salesforce and Nonprofit Cloud.	A public group for discussion around the Nonprofit Cloud product which was launched in March 2023.

Requires Premier or Signature Success Plan   ★ Key documentation

Source: Salesforce Nonprofit Cloud Recommendation Map

FAQs from Current NPSP customers

- **Do I have to migrate?**
  - No, not if you don't want to.
- **Will NPSP continue to receive enhancements?**
  - In theory, yes, but in reality less clear.
- **Is there a chance NPSP will be sunset at some point?**
  - I think the odds are very good, though in reality it would likely be at least 5 years away.
- **When should I consider migrating?**
  - If you are planning to make significant enhancements to your current NPSP org.
  - If NPSP isn't working for you and NPC solves your problems
  - If the ISV apps you need are compatible
  - If you have the capacity to absorb the time, cost, effort, and change of a re-implementation
- **Will migration be hard, time consuming, and expensive?**
  - Yes, and this is more true the more you have customized and extended your org, and the more data, users, and integrations you have
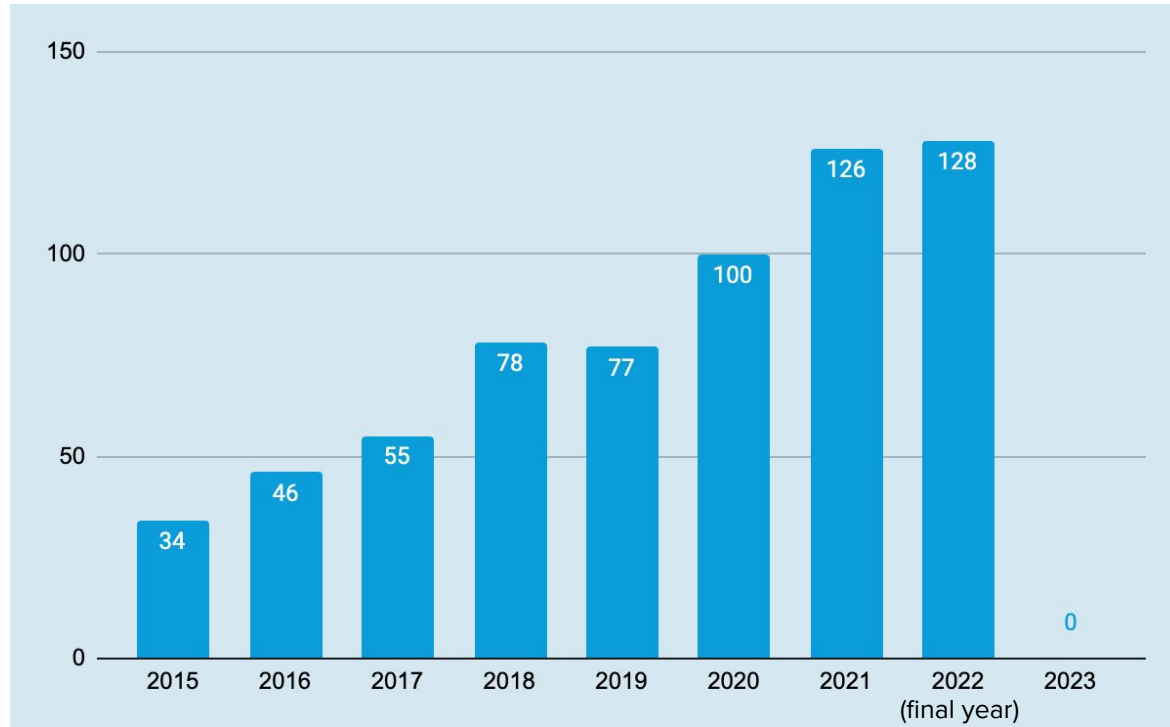
Summary

- NPC is now the go-forward solution for nonprofits, with a large degree of feature parity to NPSP, plus new capabilities and some limitations.

- NPSP is still available for new and existing customers.

- Organizations on NPSP can, but do not need to, move to NPC. Moving to NPC is a re-implementation, not an upgrade.

Partners

Salesforce.org Partner Network - North America

Source: Watt Hamlett Consulting analysis

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☐ B2C Commerce
☐ Customer 360 Platform
☐ Data Cloud
☐ Education Solutions
☐ Einstein

Show More +

Industry Expertise   Select All

☐ Agriculture & Mining
☐ Automotive
☐ Communications

NuAgeExperts
A ConvergeOne COMPANY
NUAGE EXPERTS: SALESFOR
★★★★★

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Salesforce
SUMMIT PARTNER
ALGOWORKS | DEVELOPMEN
★★★★★   CHAT

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SALESFORCE EXPERTS
PARTNER   PARTNER MSP
ON-DEMAND EXPERTS, FRAC
★★★★★

KSOLVES
Emerging Ahead Always
SUMMIT PARTNER   ★★★★★ 4.9/5
KSOLVES | SALESFORCE CON
★★★★★   CHAT

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Seasoned Salesforce Implementers
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AEKOT
★★★★★

Kelley Austin
KELLEY AUSTIN | SUMMIT C
★★★★★

SKYVENN
Summit (Platinum) Partner
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SUMMIT PARTNER
PLATINUM PARTNER: SALES,
★★★★★   CHAT

SPINNAKER SUPPORT
SALESFORCE MANAGED SERVICE PROVIDER AND CONSULTING
SPINNAKER SUPPORT
★★★★★

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Salesforce Partner Finder

Find Your Salesforce Partner

Quick Search

🔍 Search by partner name...

0 Filters Applied

▸ Product Expertise

▸ Industry Expertise

▸ Service Expertise

▸ Location

▸ Customer Rating

▸ Salesforce Practice Size

▸ Impact

Are you looking for a Salesforce Cloud Reseller? Check out the Find a Cloud Reseller page.

Are you a partner? Download the Partner Checklist for next steps and FAQs.

Find the right Salesforce expertise.

70% of Salesforce implementations benefit from the knowledge of consulting partners. Find a partner expert that matches your specific needs across Salesforce products, industries, and services. Start your search today and accelerate your business growth.

Use our step-by-step guide to get started.

[Get started]

Note: This page is governed by the Salesforce Program Agreement and is designed to include Consulting Partners that have a public consultant listing on the AppExchange. Learn more.
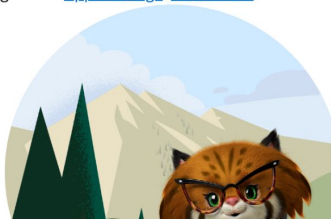
▼ Product Expertise

Filter by partners with expertise in implementing Salesforce products.

- ▼ ☑ Nonprofit Solutions
  - ☐ Engagement
  - ☐ Fundraising
  - ☐ Grantmaking
  - ☐ Program Management
  - ▸ ☐ Revenue Cloud

178 firms

▼ Industry Expertise

Filter by partners with expertise in your industry or sector.

- ▼ ☑ Nonprofit
  - ☐ Affiliation & Membership Groups
  - ☐ Environment, Nature & Energy
  - ☐ Nonprofit - Other
  - ☐ Social Services
- ▸ ☐ Professional Services
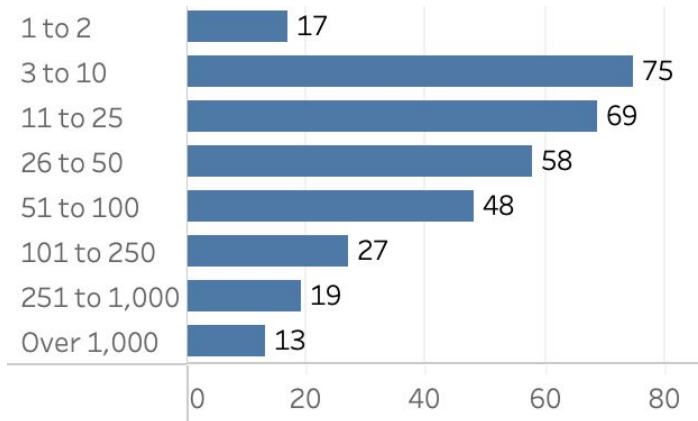- ▸ ☐ Public Sector

232 firms

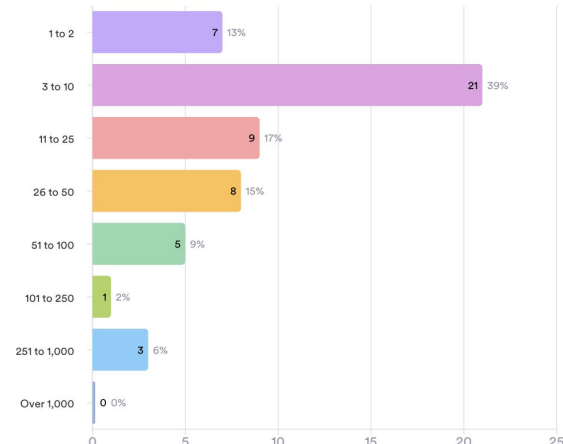*findpartners.salesforce.com*

Watt's List

WHC Nonprofit Cloud Implementation Survey

- Conducted online February 26 - March 20, 2024
- Conducted anonymously to encourage honest answers
- 75 consulting businesses responded; Confidence level: 95%, Margin of error: 10%

Distribution of nonprofit consulting firms on AppExchange by consulting staff size

Consulting staff size	Count
1 to 2	17
3 to 10	75
11 to 25	69
26 to 50	58
51 to 100	48
101 to 250	27
251 to 1,000	19
Over 1,000	13

Distribution of survey respondents by consulting staff size

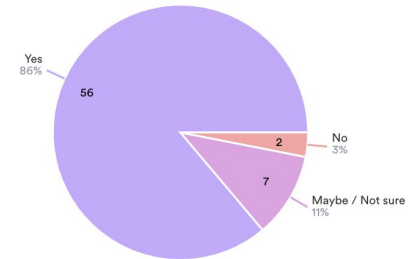| Consulting staff size	Count	Percent
1 to 2	7	13%
3 to 10	21	39%
11 to 25	9	17%
26 to 50	8	15%
51 to 100	5	9%
101 to 250	1	2%
251 to 1,000	3	6%
Over 1,000	0	0%

WHC Nonprofit Cloud Implementation Survey

Is your company ready and willing to take on Nonprofit Cloud projects?

Yes
80%

60

No
8%

6

9

Maybe / Not sure
12%

All respondents

Yes
86%

56

No
3%

2

7

Maybe / Not sure
11%

Consulting Firms

Yes
40%

4

No
40%

4

2

Maybe / Not sure
20%
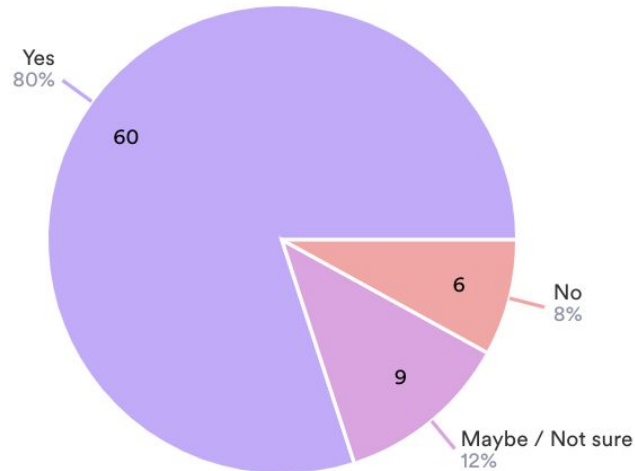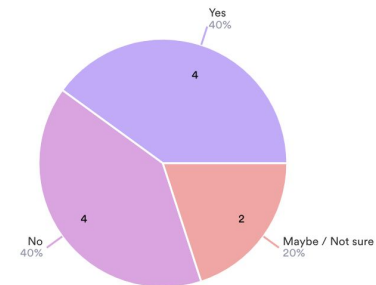
Independent Consultants

WHC Nonprofit Cloud Implementation Survey

What is the status of your company's work with the new Nonprofit Cloud?
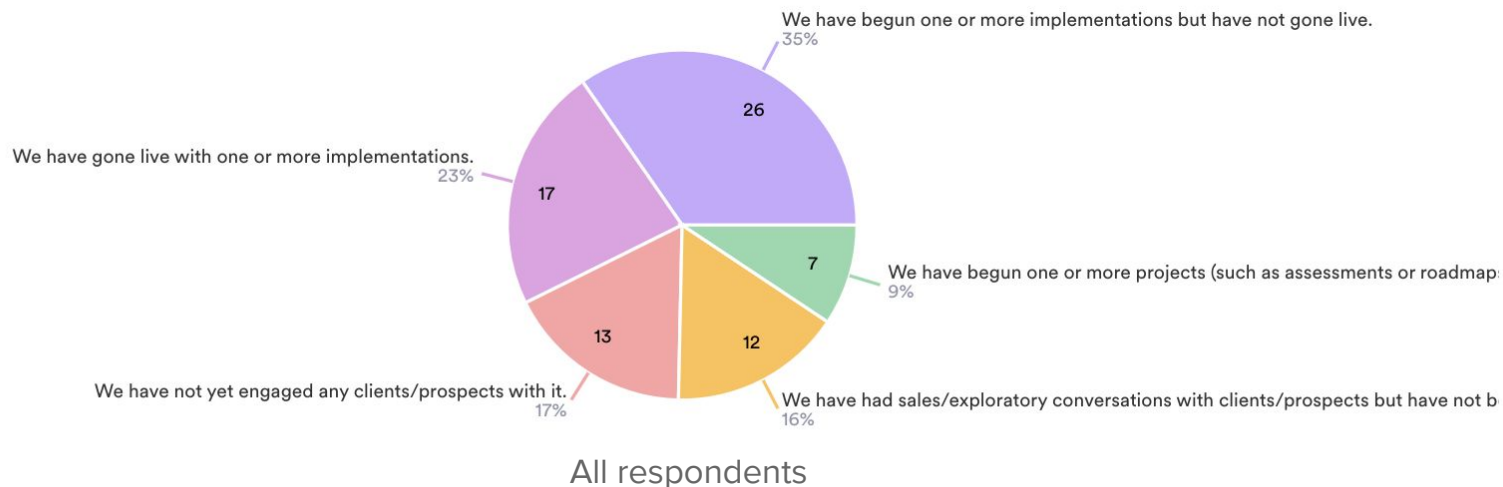
We have begun one or more implementations but have not gone live.
35%

26

We have gone live with one or more implementations.
23%

17

We have begun one or more projects (such as assessments or roadmap
9%

7

We have not yet engaged any clients/prospects with it.
17%

13

12

We have had sales/exploratory conversations with clients/prospects but have not b
16%

All respondents

● We have begun one or more implementations but have not gone live. ● We have gone live with one or more implementations.
● We have not yet engaged any clients/prospects with it.
● We have had sales/exploratory conversations with clients/prospects but have not begun any projects.
● We have begun one or more projects (such as assessments or roadmaps) but have not begun any implementations.
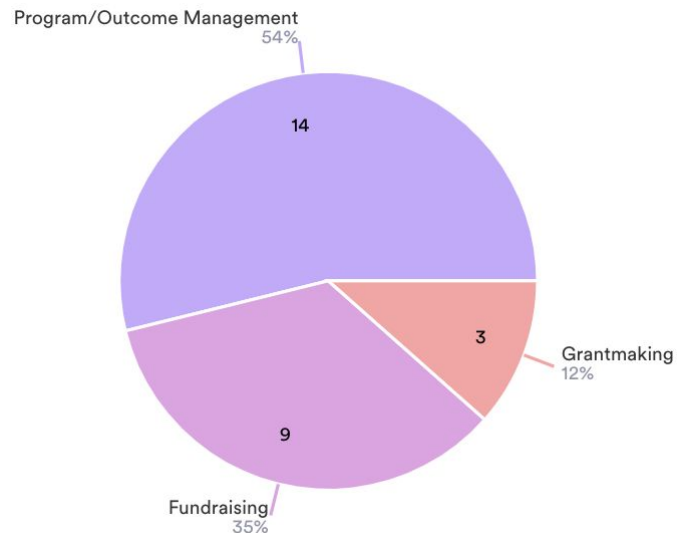
WHC Nonprofit Cloud Implementation Survey
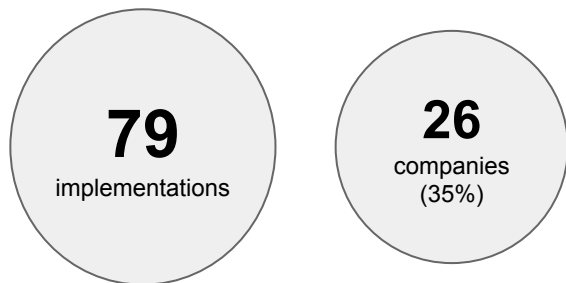
Completed Implementations

35 implementations

17 companies (23%)

NPC features in-scope

Program/Outcome Management 54%

14

Grantmaking 12%

3

Fundraising 35%

9

WHC Nonprofit Cloud Implementation Survey

In-Progress Implementations

79
implementations

26
companies
(35%)

NPC features in-scope

Fundraising
39%

22

14

Grantmaking
25%

Program/Outcome Management
37%

21
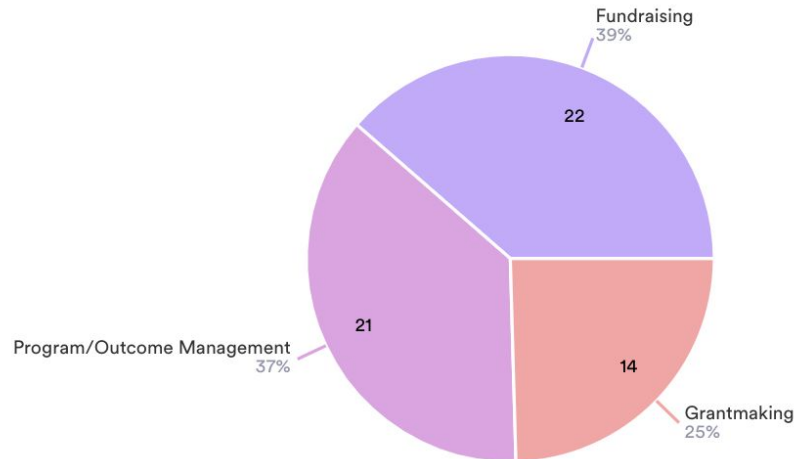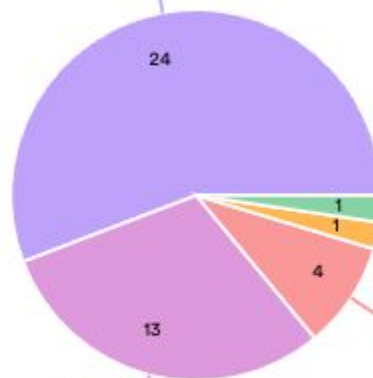
WHC Nonprofit Cloud Implementation Survey

In general, how would you compare the complexity of Nonprofit Cloud implementations to NPSP implementations?

Nonprofit Cloud implementations are more complex
56%

24

The complexity is less about the product and more about the custome
2%

1

Nonprofit Cloud implementations are less complex
2%

1

Nonprofit Cloud implementations are about the same level of complexity
9%

4

It depends
30%

13

45 companies

- Nonprofit Cloud implementations are more complex
- It depends
- Nonprofit Cloud implementations are about the same level of complexity as NPSP implementations.
- Nonprofit Cloud implementations are less complex
- The complexity is less about the product and more about the customer needs.

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Salesforce Professionals
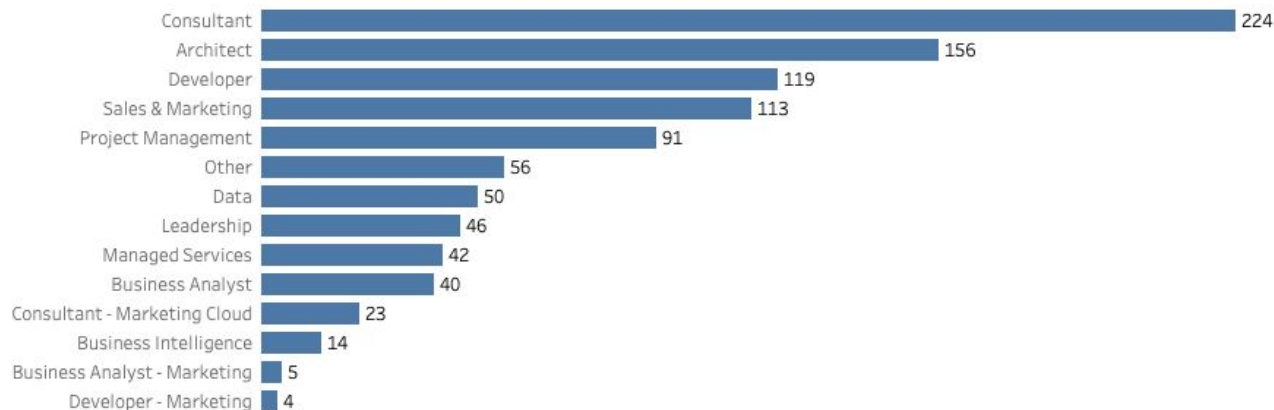
Nonprofit-related Salesforce Jobs

- **Nonprofit and Education Jobs Trailblazer group** (trailhead.salesforce.com)
- **Trailblazer Career Marketplace** (trailhead.salesforce.com/careers)
- **Idealist.org**
- **Watt's List Consulting Jobs page** (www.wattslist.info/consulting-jobs)

Watt's List Consulting Jobs Page

Total Months	Avg Postings Per Month	Unique Postings	Job Categories	Number of Firms	Total Unique Visitors
7	140	430	14	49	7,000

Jobs by Type

Type	Count
Consultant	224
Architect	156
Developer	119
Sales & Marketing	113
Project Management	91
Other	56
Data	50
Leadership	46
Managed Services	42
Business Analyst	40
Consultant - Marketing Cloud	23
Business Intelligence	14
Business Analyst - Marketing	5
Developer - Marketing	4

Source: Watt Hamlett Consulting analysis

Next Steps: watthamlettconsulting.com

For Nonprofits

Needs Assessments & Evaluations

Consulting Partner Selection

Implementation Oversight

For Both

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For Businesses

Ecosystem Intelligence

Go-To-Market Strategy

Strategic Guidance

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Helping organizations navigate & succeed in the Salesforce nonprofit ecosystem