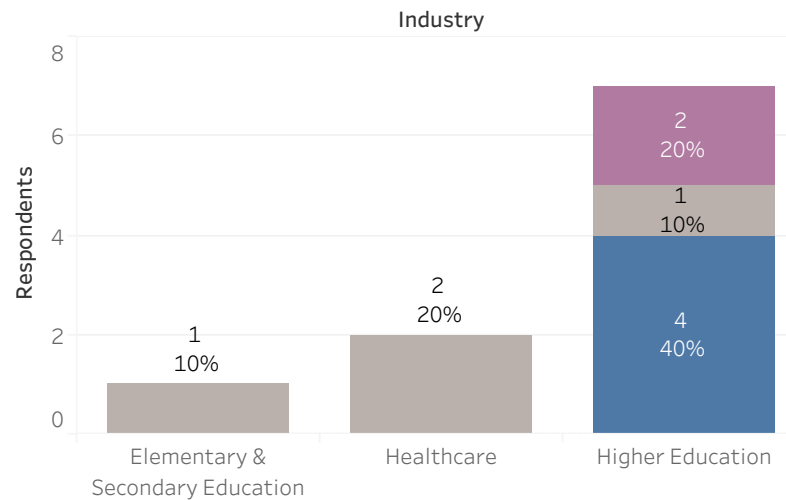


## Salesforce Choices and Lessons Learned

Total Respondents

10

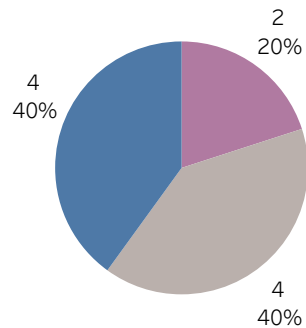
Respondents by Industry by Core CRM Solution



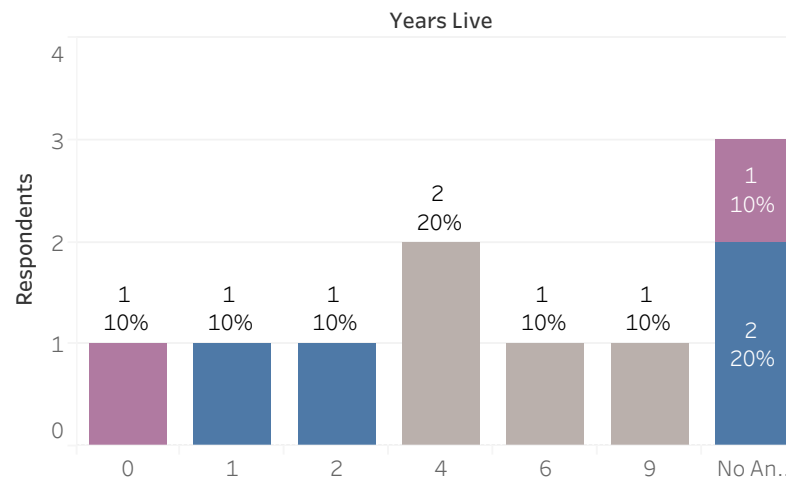
Core CRM Solution

- Affinaquest - Advancement RM
- Salesforce - NPSP
- UC Innovation - ascend

Respondents by Core CRM Solution



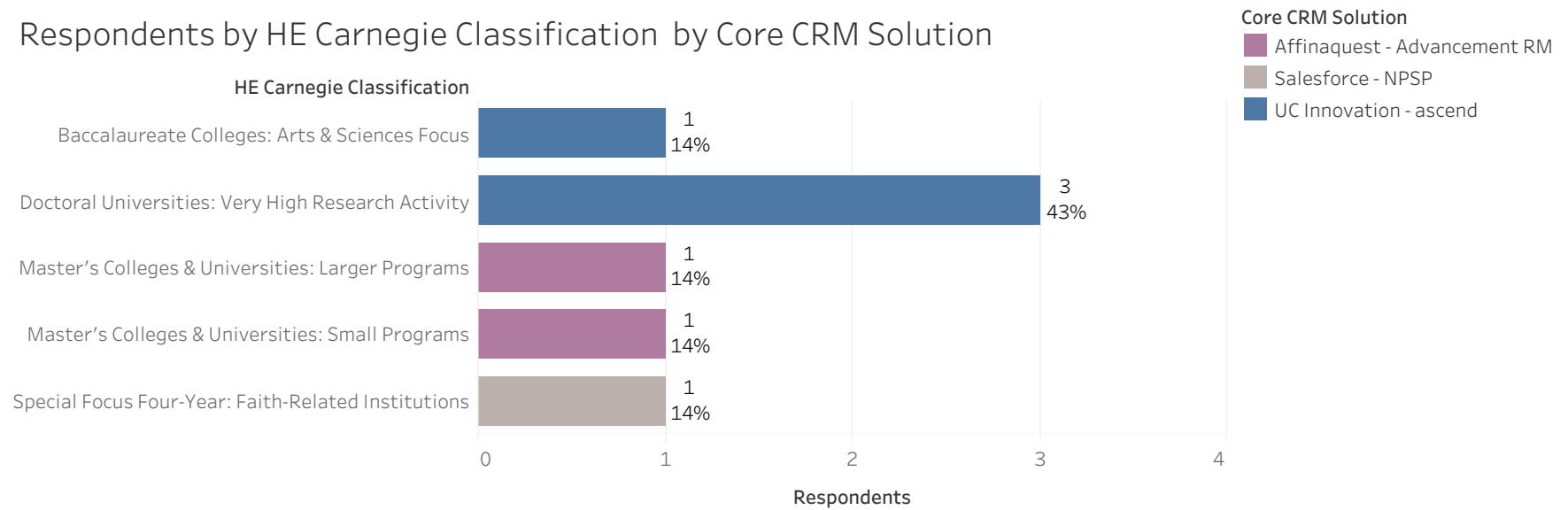
Respondents by Years Live by Core CRM Solution



Results of a survey shared on the AASP FundSvcs and Advancement Development Systems and CRMs communities on 3/6/2023.

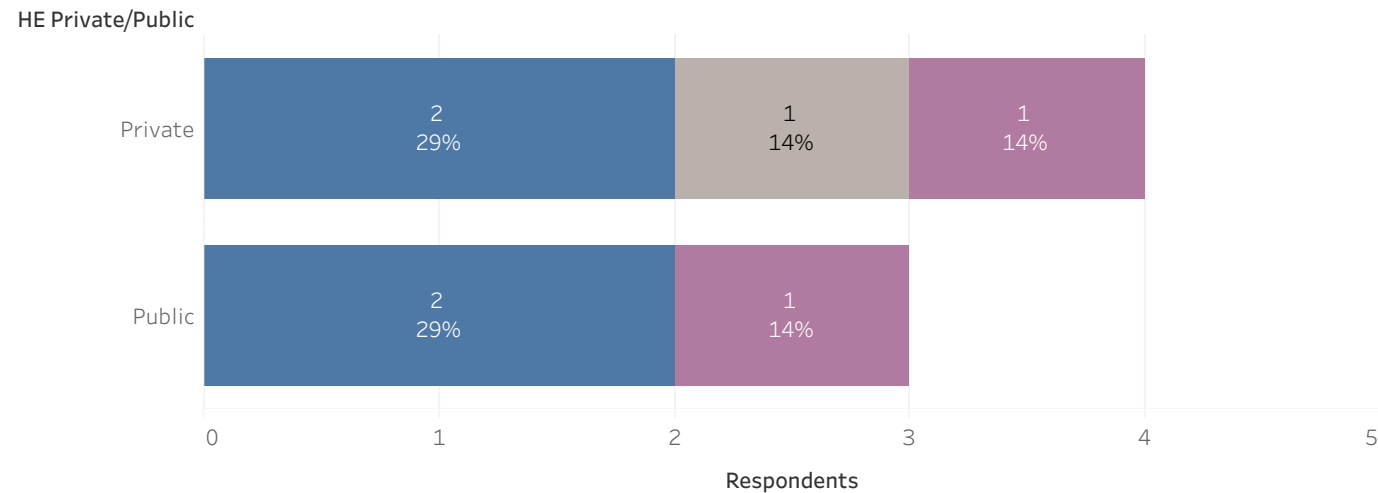
## Salesforce Choices and Lessons Learned

### Respondents by HE Carnegie Classification by Core CRM Solution



Only includes respondents in the Higher Education industry.

### Respondents by HE Private/Public by Core CRM Solution

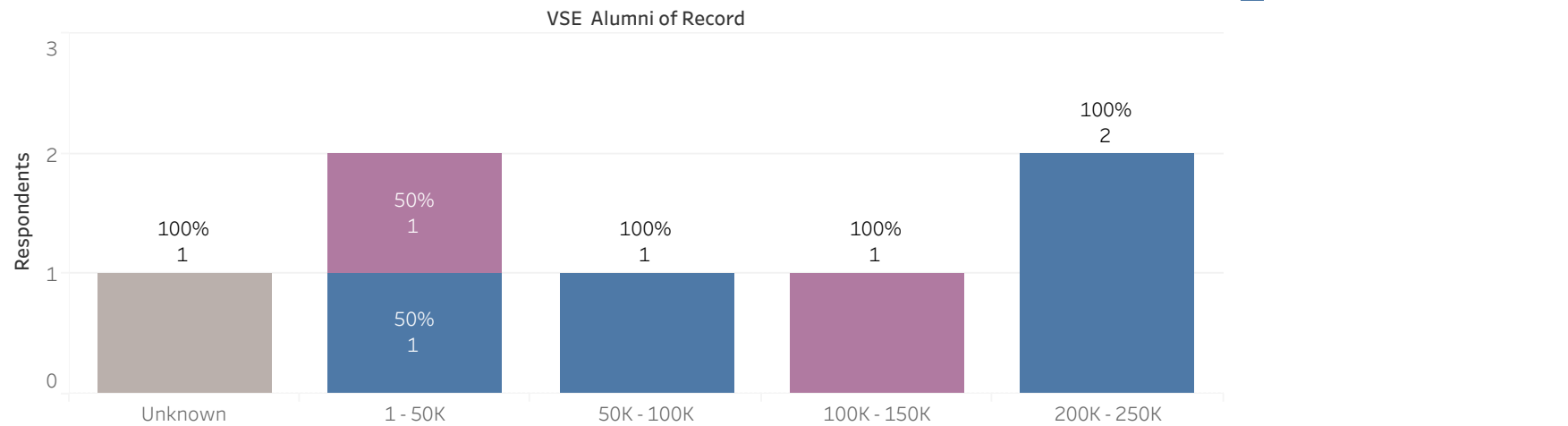


Only includes respondents in the Higher Education industry.

Results of a survey shared on the AASP FundSvc and Advancement Development Systems and CRMs communities on 3/6/2023.

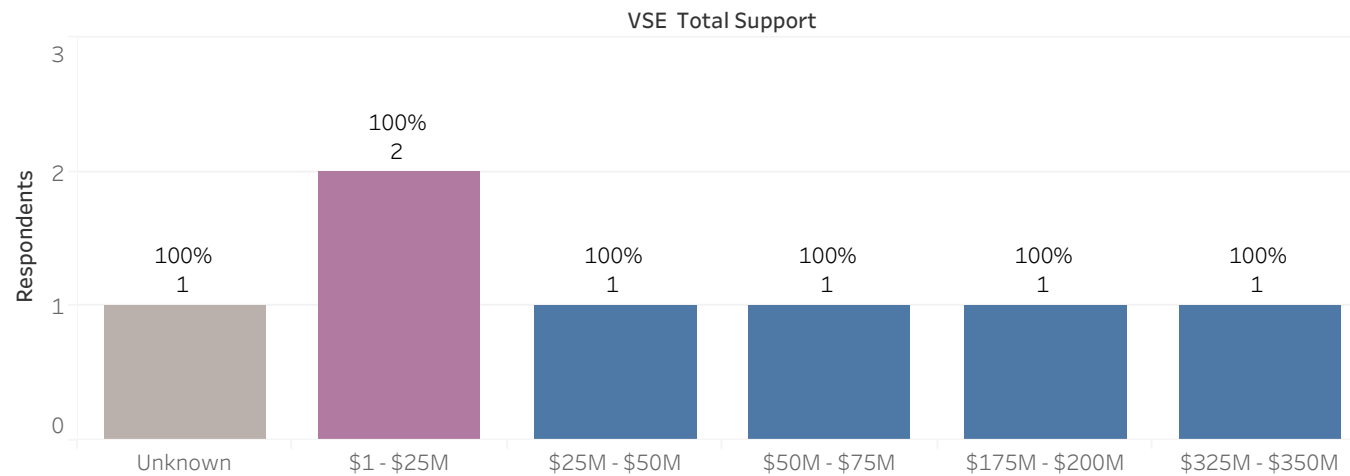
## Salesforce Choices and Lessons Learned

### Respondents by VSE Alumni of Record by Core CRM Solution



Only includes respondents in the Higher Education industry.

### Respondents by VSE Total Support by Core CRM Solution

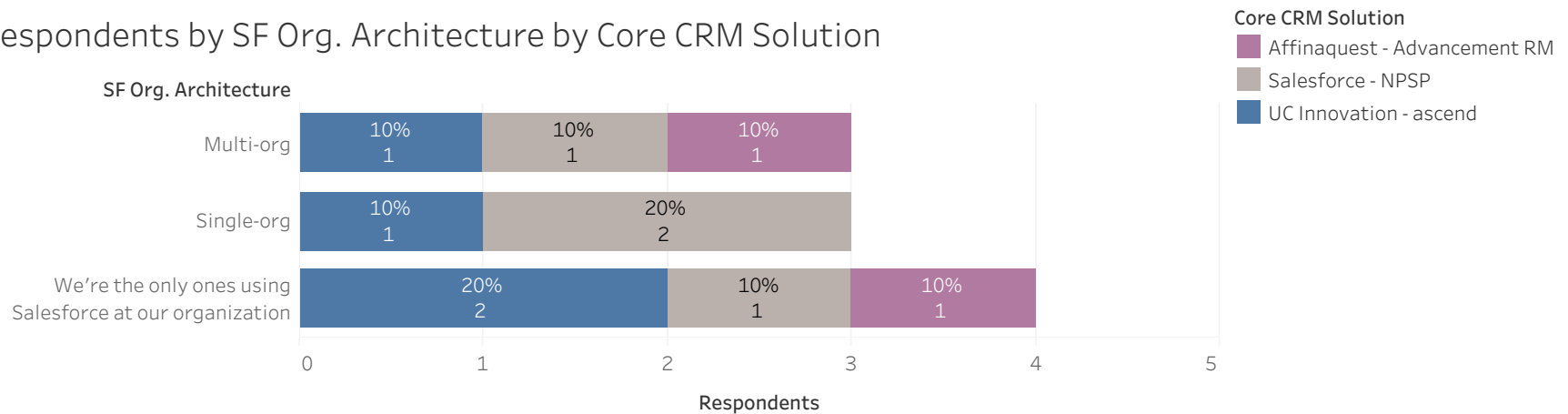


Only includes respondents in the Higher Education industry.

Results of a survey shared on the AASP FundSvcs and Advancement Development Systems and CRMs communities on 3/6/2023.

## Salesforce Choices and Lessons Learned

### Respondents by SF Org. Architecture by Core CRM Solution



### What benefits and challenges have you observed from your architecture choice?

"We had no choice. We are implementing enterprise-wide - Admissions, Advancement, and Advising. We wanted a single org, but our core CRM choice does not run on the EDA architecture. So Admissions and Advising will be in one org, Advancement in another with an org-to-org connector. All areas of the University will be using the Marketing Cloud and Blackthorn (for Events)."

"We have full control of our own instance and the rest of the organization has their own instance. The biggest benefit of having our own instance is that we can focus configuration and data architecture decisions to benefit Advancement and move more quickly. Our challenges are coordination across campus CRMs and data governance: What data can be shared across units and for what purposes? What data has better integrity when there are conflicts? Other challenges include the duplication of redundant applications and services."

"We have 24 foundations within our organization and we integrated all of their operations into a single Salesforce org. There are some other random Salesforce orgs sprinkled around our enterprise, but they do not overlap in users, data, or usage."

Having a single org lets us set standards for naming conventions, recording gifts, campaign management, etc... Also, when it comes to SalesforceID values and 'externalID' values, they are guaranteed to be unique to your shop versus being possibly duplicated with a different org in your organization.

A Salesforce Administrator will be a full-time job. Better to have one org to manage versus several orgs to try and keep in sync with each other."

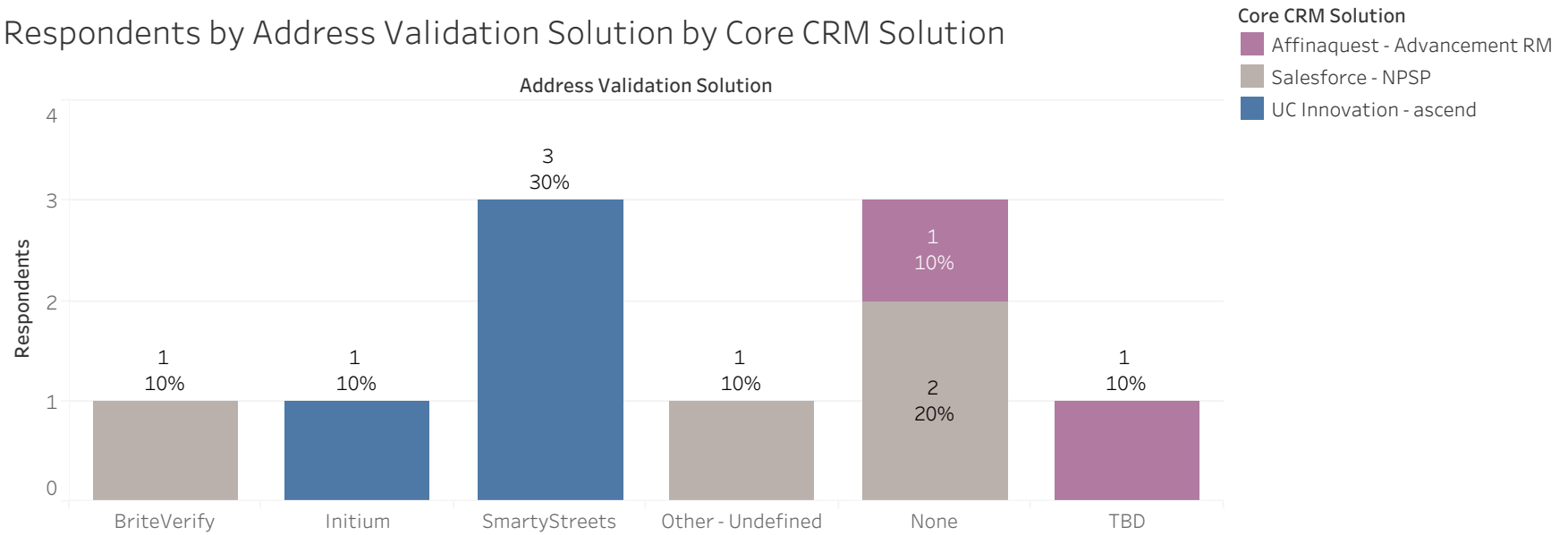
"Our lifelong learning branch uses the same NPSP instance as development, and I know it's been challenging for them - particularly as it relates to event management. It's nice to be in a single org since there is a lot of overlap between alumni, donors, and event participants that would partake in lifelong learning offerings. It can also be confusing because we tried to shoehorn event registrations into the opportunity object. This has not been a very successful pairing for the lifelong learning branch from an operation standpoint, although I'm not sure how an additional org would have made much difference."

*Responses have been edited for anonymity, brevity, and clarity.*

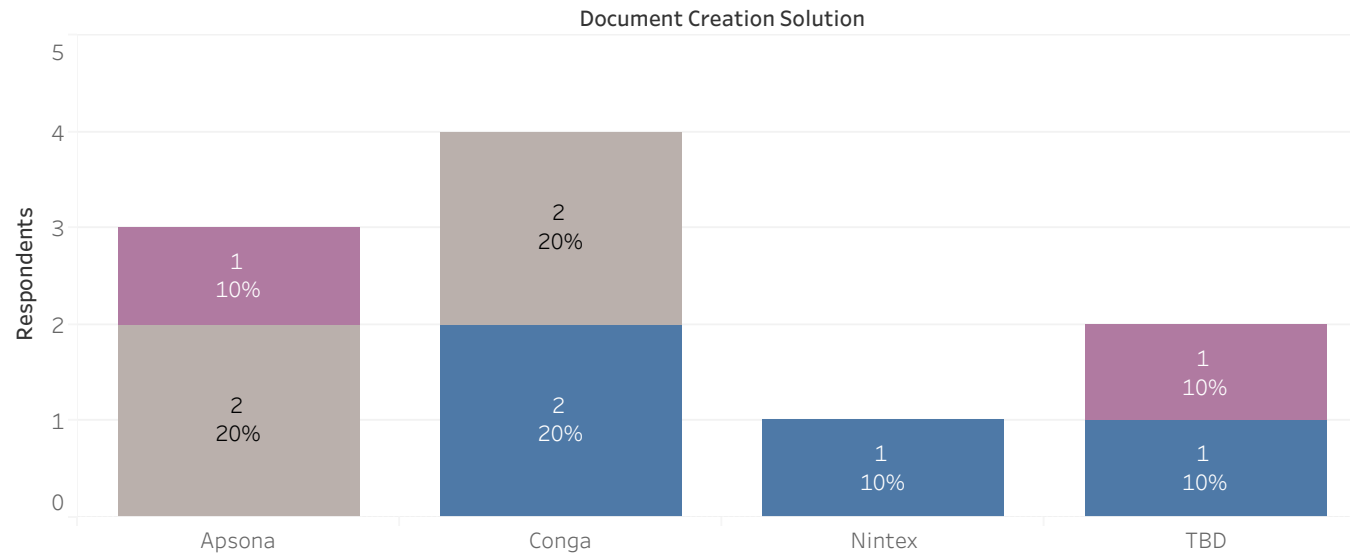
Results of a survey shared on the AASP FundSvc and Advancement Development Systems and CRMs communities on 3/6/2023.

## Salesforce Choices and Lessons Learned

### Respondents by Address Validation Solution by Core CRM Solution



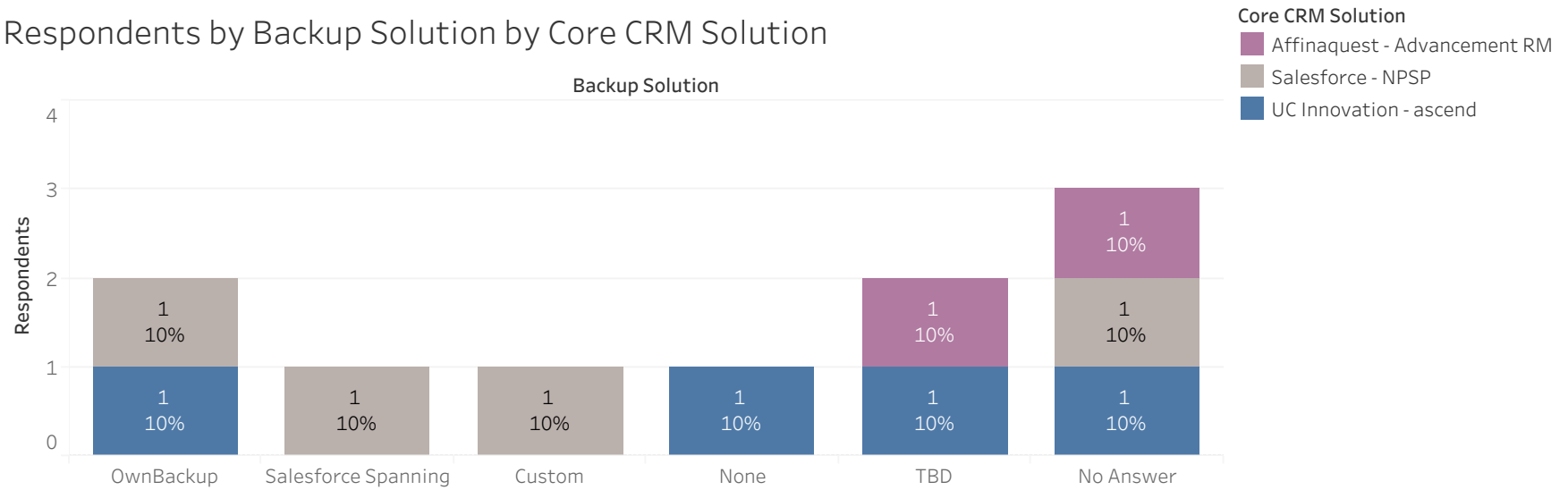
### Respondents by Document Creation Solution by Core CRM Solution



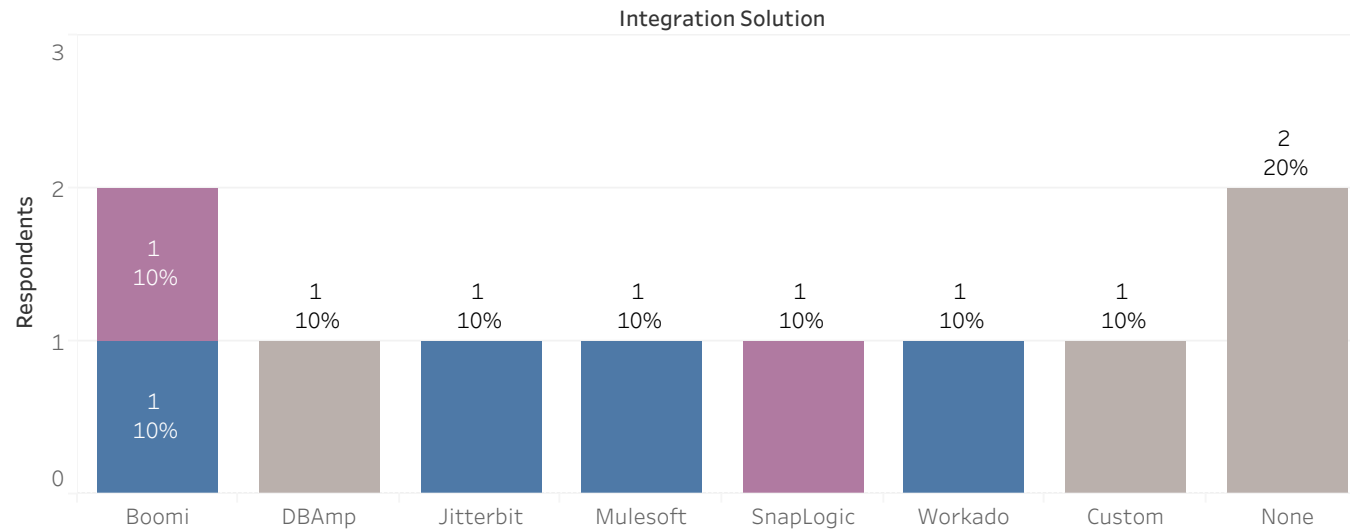
Results of a survey shared on the AASP FundSvcs and Advancement Development Systems and CRMs communities on 3/6/2023.

## Salesforce Choices and Lessons Learned

### Respondents by Backup Solution by Core CRM Solution



### Respondents by Integration Solution by Core CRM Solution



Results of a survey shared on the AASP FundSvcs and Advancement Development Systems and CRMs communities on 3/6/2023.

## Salesforce Choices and Lessons Learned

### What complementary software and services, other than those listed above, have you found valuable?

"OnDemand Tools, Conga Grid, Classy, Roll-up Helper"

"OnBase, CopyStorm, GearSet, Enterprise Tableau, a proper ETL database (in our case an Oracle environment)"

"We are planning on implementing Marketing Cloud and Advertising Studio as well as moving our constituent portal to Experience Cloud. We are planning on implementing Blackthorn events."

"Some wealth screening vendors integrate well with Salesforce, the same for some landing page/credit card donations/event vendors. I think you will find most commercial-strength vendors support Salesforce to some degree."

"Declarative Lookup Rollup Summary"

*Responses have been edited for anonymity, brevity, and clarity.*

## Salesforce Choices and Lessons Learned

### What, specific to Salesforce, do you wish you had known before you started your implementation?

"How the system handled hard/soft/match credits. The Salesforce core CRM we selected handles them with more complication than our old system. We went live in February, so we are still very much figuring out how everything works in real time."

"Get staff that are making decisions into Trailhead to explore Salesforce functionality before making decisions. Clean ALL data before conversion. Reimagine processes/policy."

"Most concerned about the lack of an online giving module in Salesforce core CRM we selected. We are going to have it built for us. We currently use iModules (Anthology Encompass) which has good integration with email marketing and online giving (and event registration with a gift component). I think it is going to be difficult to duplicate the functionality we are accustomed to. But we knew we were going to need to make some concessions to go live on a platform that integrated with the rest of campus."

"Fully understand the structure and leverage it. Fully envision the ideal state for the business before coming up with any technical solutions."

"One of the biggest tough lessons for us was the limitations of reporting and data management in base Salesforce. We did not anticipate the level of reporting and ETL buildout that would be required to do what we need to do."

"The entire eco-system was a learning experience. Remember to plan for buying extra storage in Salesforce ... this was a late developing piece of information we got. Use an lawyer experienced in cloud computing law to help your contract negotiations and negotiate the pricing."

"Package selection is important. We started Salesforce using the roundCorner NGO Connect package - which was recommended by Salesforce back in the day. Well, Salesforce acquired roundCorner and sunset their packages. We just recently migrated to the NPSP package because it is native Salesforce - which means it is more future-proof."

Changes will be made by Salesforce and implemented three times a year. Everyone will have to react to those changes. Depending on how far the Salesforce core CRM we selected deviates from the purpose and usage of native Salesforce objects, their job may get harder to keep up. Also, vendors with Salesforce packages may only work with native Salesforce objects and may not integrate well with custom objects."

"Maybe the amount of back-end time required to continually get the best out of Salesforce.org. We're a small shop and I'm part gift processor, donor relations, database manager, marketing resource, report creator... And it's been fine, no major complaints. But I feel like there is a near endless amount of platform-specific knowledge that I could learn and no time to learn it. Again, nothing critical has surfaced so far, I just have the sense of never being able to be caught up with all the platform has to offer."

*Responses have been edited for anonymity, brevity, and clarity.*