



# Modernize Your Fundraising Technology & Supporter Experience

July 17, 2019



## Today's Speakers



**Piper LeJeune**

Salesforce.org  
Product Marketing  
Manager, Fundraising



**Erin Lee**

The Greater Boston  
Food Bank  
Director of Revenue  
Operations



**James Jenkins**

JFK Library Foundation  
Director of Individual Giving



## Rapid Change in the Nonprofit Sector



**TRANSPARENCY**  
is the key to trust

**64%**

see an increased demand in transparency from funders and donors <sup>1</sup>



**MODELS FOR CHANGE**  
are forced to evolve

**92%**

of nonprofits say reporting impact back to donors is still completely or partially manual



**DATA**  
is integral to connecting

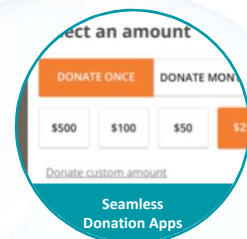
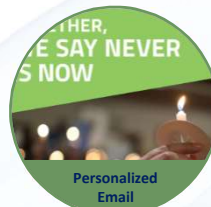
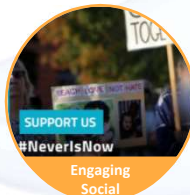
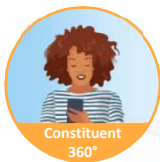
**90%**

of organizations collect data, but only 5% use the data in the decisions they make



## Great experiences lead to more donations

But require the right data to segment, personalize, connect, convert & measure





**“It’s up to nonprofits to make giving easy, compelling and irresistible regardless of platform.”**

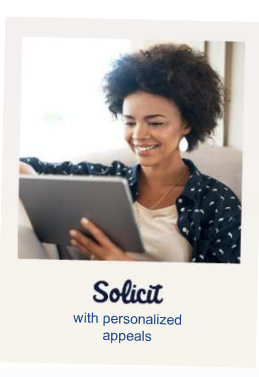
2019 M+R Benchmarks Report

\*1: M&R Benchmarks 2019: Watch the webinar: [bit.ly/mrrecord](https://bit.ly/mrrecord)

\*2: The Fundamentals of Nonprofit Marketing & Engagement 2019



## Giving is Personal. Is your Technology?



# The Salvation Army is a *Trailblazer*

Increasing deliverability efficiency with every touchpoint



**90%** increase in deliverability

*"We had an 85% spam rating. Our mail wasn't landing in inboxes."*

Piper Lejeune, Director of Digital Strategy,  
The Salvation Army

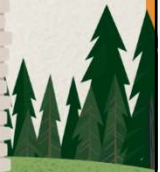
Digital transformation influences **140%** increase in online revenue

Transformed digital marketing processes and streamlined constituent communications across multiple channels

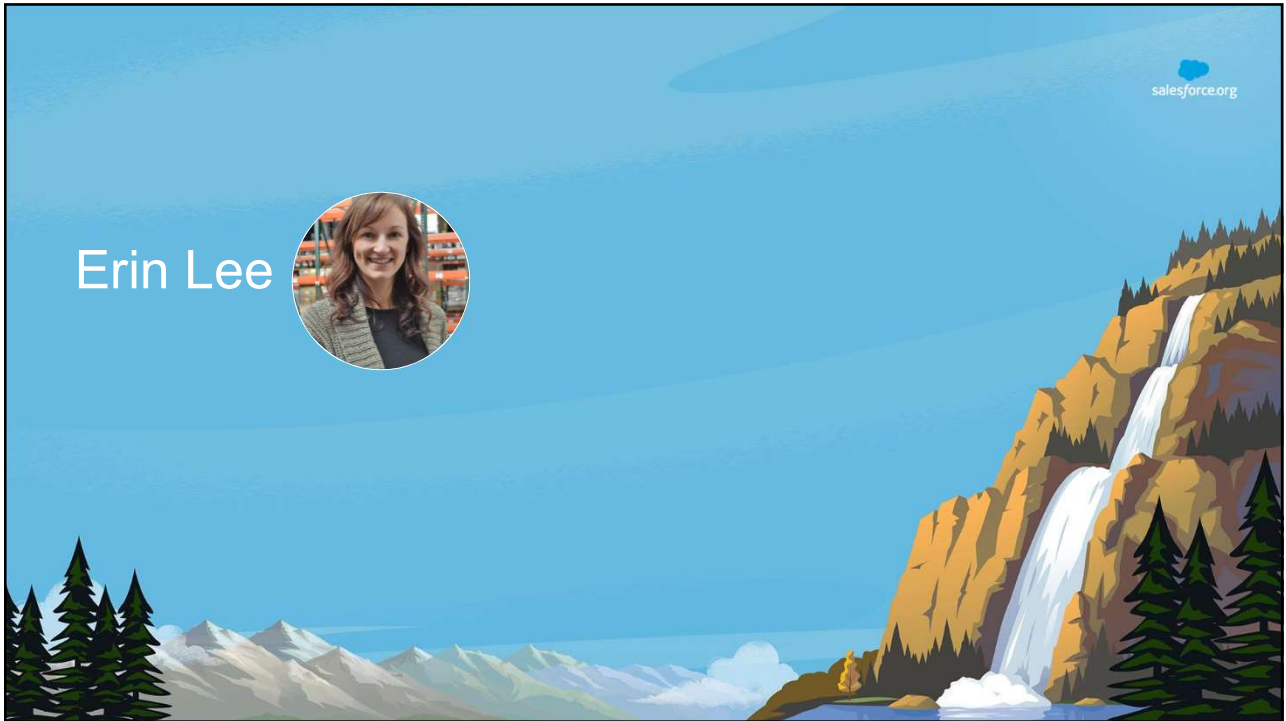
Able to reach a larger group of donors, expanding the average demographic age from 76 to 68

**PRODUCTS USED**

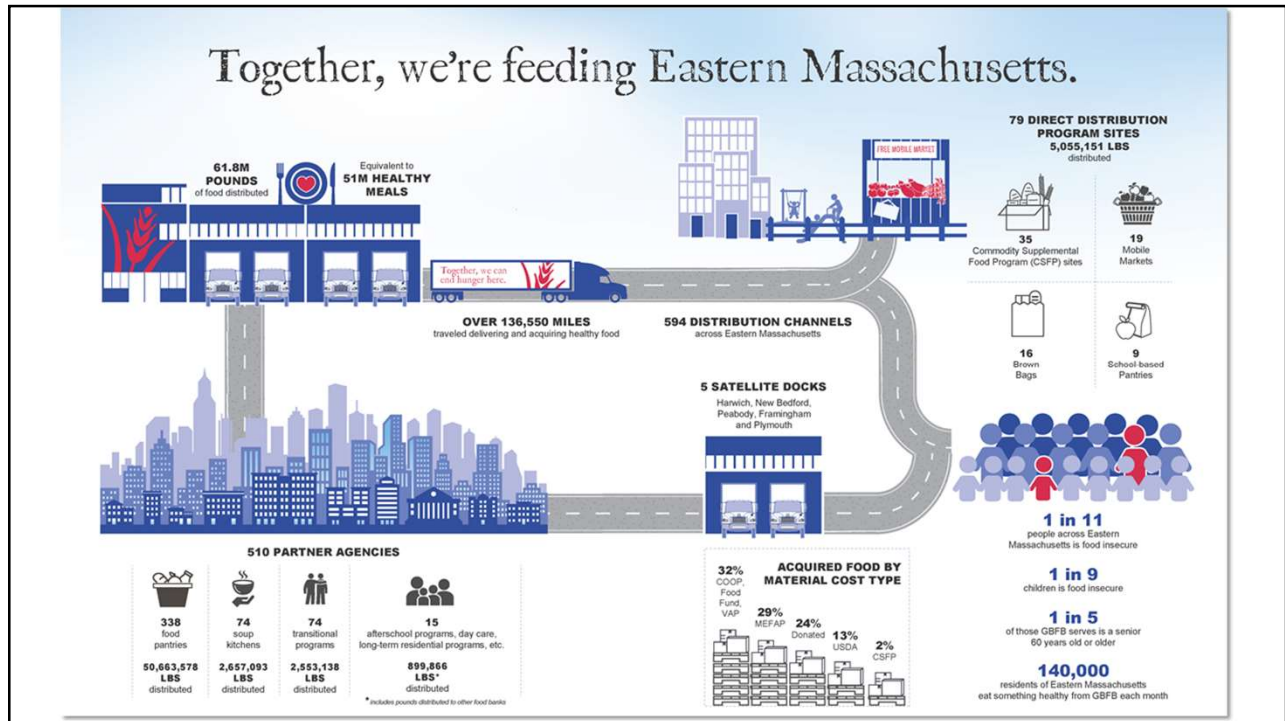
- Marketing Cloud
- Sales Cloud



Erin Lee







## Our Journey to Modernizing Technology



“That’s the way we’ve always done it.”

## Our Journey to Modernizing Technology

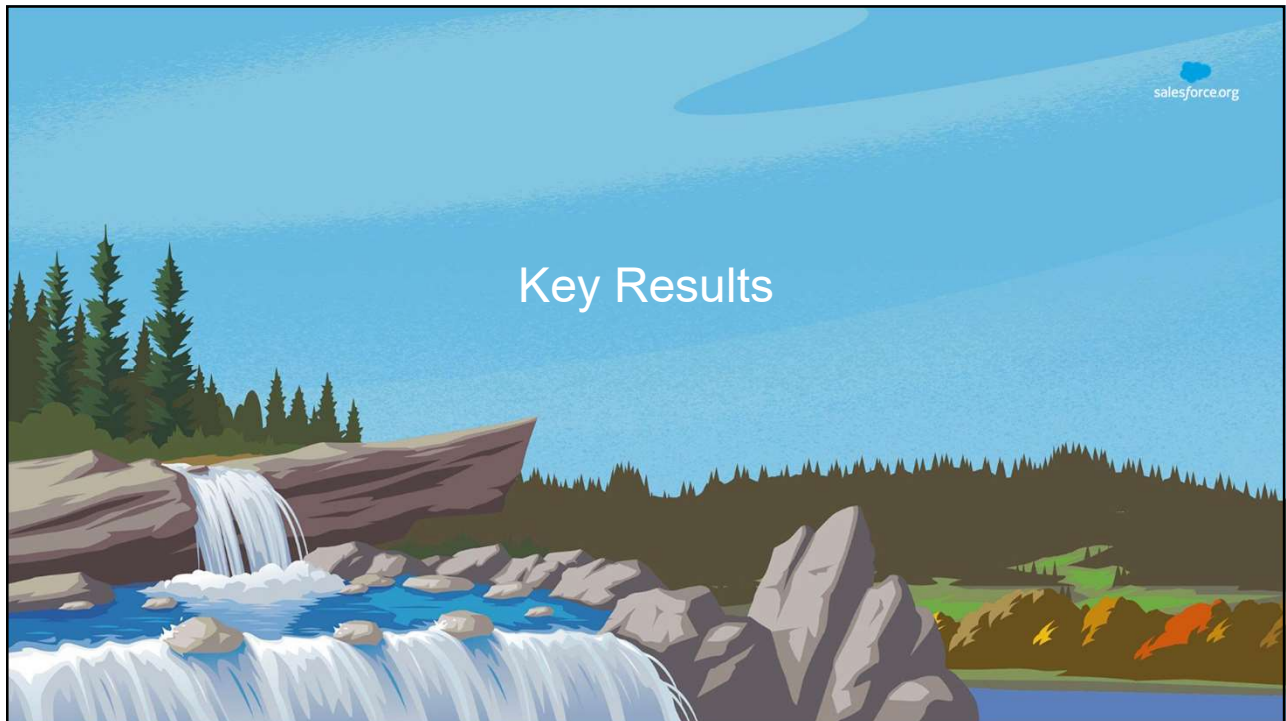


When someone asks if they  
can fax me something.

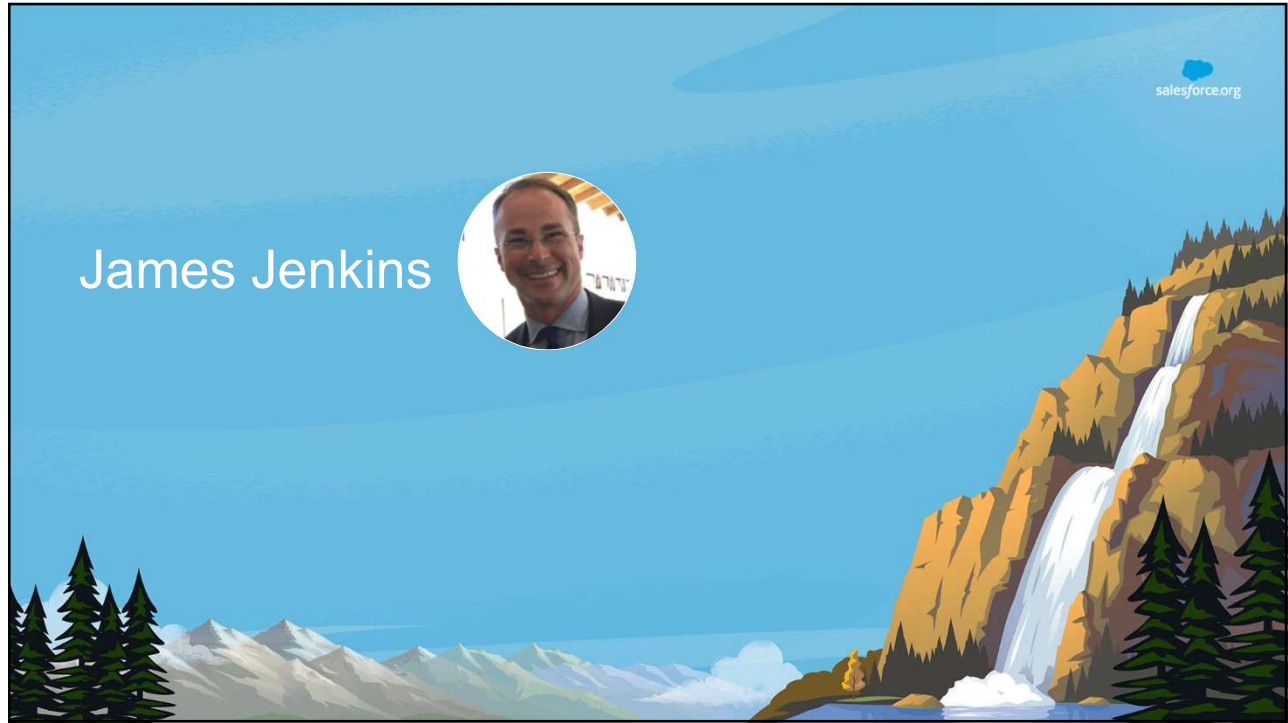




# What's Next?







**MOONSHOT**  
RENEWING JOHN F. KENNEDY'S  
MOONSHOT CHALLENGE

**ASK NOT**  
RENEWING JOHN F. KENNEDY'S  
CALL TO SERVICE

JOHN F. KENNEDY  
LIBRARY FOUNDATION

*“Not only a memorial to President Kennedy but a living center of study of the times in which he lived, which will inspire the ideals of democracy and freedom in young people all over the world.” - Jacqueline Kennedy*

**1969**

**2019**

JOHN F. KENNEDY  
LIBRARY FOUNDATION

65% of our members are over 60 years old

80% of Americans were not alive during President Kennedy's lifetime

*"The times demand new invention, innovation, imagination, decision. I am asking each of you to be pioneers on that New Frontier." - John F. Kennedy, July 15, 1960*

**Main Goal: 200% Increase in Members**

JOHN F. KENNEDY  
LIBRARY FOUNDATION

**#3: Improve business intelligence & reporting**

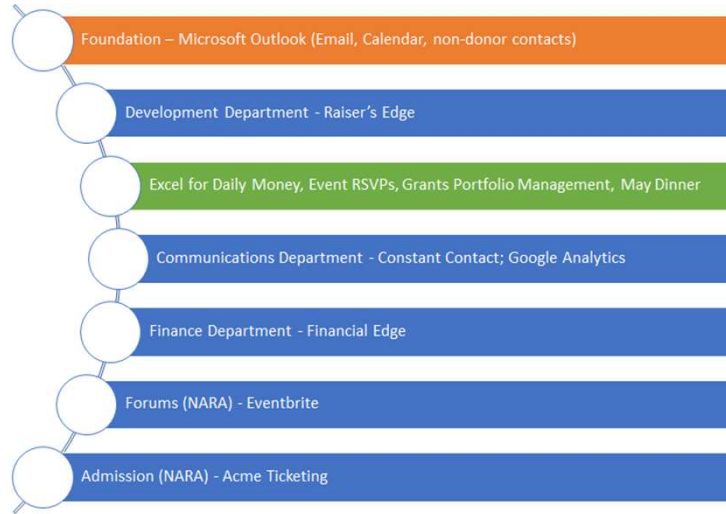
**#2: Streamline business operations**

John F. Kennedy  
PRESIDENTIAL LIBRARY AND MUSEUM

**#1: Modern CRM systems with full view of constituent's relationship**

## Performance Barriers: Department-driven Silos

- X** Low to no mobile access
- X** Disconnected data & systems
- X** Generic communications
- X** Time consuming reporting
- X** Limited Partnerships
- X** Risky infrastructures



## Our Goal: More Meaningful Experiences

Impossible in a busy, fragmented world





Our Moonshot

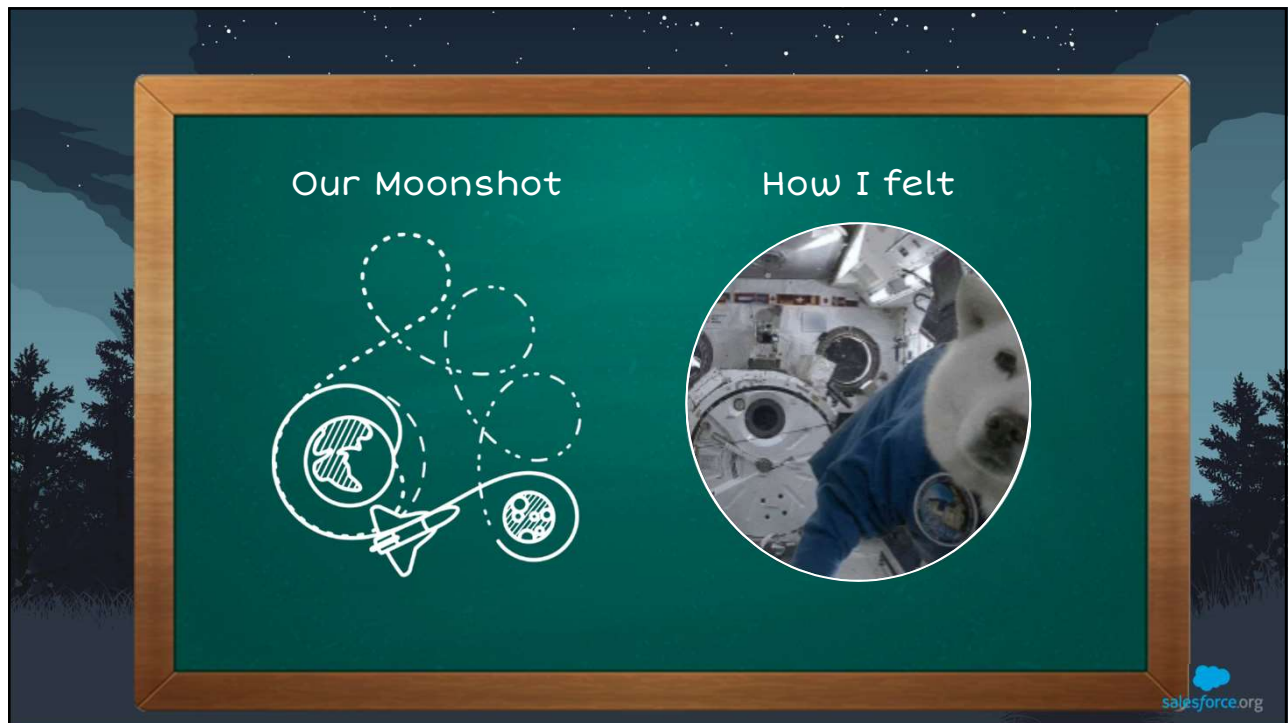
What I needed



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Our Moonshot

How I felt



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## Outside Help Helped

**Report** from outside firm based on interviews and analysis of our existing situation.

- Departmental analysis
- Data and processes
- Technology gaps
- Much more...

**30 Page Report**

**Trusted**

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But....where do we go from here?

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**Internal Analysis**

Efficient and effective decision making

**RFP?**

More Money, More Problems

**Decision?**

Paralysis of possibilities





# Our Analysis

## 1) Understand user needs & workflows

User	Name	Roles and Responsibilities and What You
Admin	Database and Research Associate (Alex Sniffen)	Ensuring the technology is maximized by Managing lists, database, and app integ
Admin	IT Consultant (Bob Berman)	General IT Support for Database and Re
Senior Leader	Executive Director (Steven Rothstein)	Mobile contact reporting and viewing, P dashboards, Communications Approvals
Senior Leader	Deputy Director (Rachel Fior)	Better Monthly Calendar of Communic
Senior Leader	Chief Financial Officer (Doris Drummond)	Receive clearer reports for General Led
Senior Leader	VP of Development (Maura Hammer)	Current spreadsheets for tracking and r
Director of Marketing	Overview of Marketing Campaigns Tied	
Communication Officer (Matt Porter)	Pardot Email, Social Media, and Commu	
Digital Strategist (Jamie Richardson)	Better Control of Monthly Editorial Cal	
Director of Awards and Special Projects (Meaghan H)	Pardot limited access	
Director of Individual Giving	Responsible for individual giving pipelin	
Membership and Annual Fund Coordinator	Responsible for all Engagement Pathwa	
Manager of Special Events (Caitlin Wells)	Individual Giving inside and outside of	
Development Assistant (Caroline Colavita)	Manage May Dinner and smaller events	
New Frontier Network Manager (Andy Morgan)	Online gift entry will be automated. Da	
Grants Admin	track all NFN corporate sponsorships, e	
Membership Representative (Two Part-time people)	input all grants submitted to track	
Staff Accountant (Jen/Lorena)	Limited access to sell memberships	
Optional:	Track gifts and pledges and monthly ans	
Education Department Admin (Maria, etc.)	Education could have Pardot limited ac	
Forums Admin (Tr Murnhy)	Eventbrite or GiveLively access for mem	

## 2) Software/vendor comparison

Vendor 1	Vendor 2	Salesforce	Vendor 3
3rd	1st	2nd	
2nd	1st	3rd	
2nd	1st	2nd	
Vendor 2	Salesforce	Vendor 3	

## 3) 5 Year total cost of ownership

Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5	5yr Total	5yr Total
\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$5,000,000
\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$5,000,000
\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$5,000,000
\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$5,000,000
\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$5,000,000
\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$5,000,000



# The Solution: Connected Fundraising & Marketing

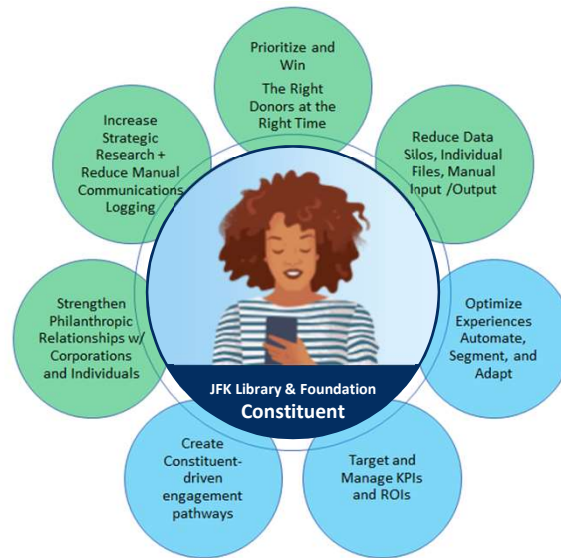
A scalable, connected platform to support 200% membership growth



- 1) 360 view of the work JFK is doing towards their mission.
- 2) Share information and eliminate duplicate data entry, giving accurate reporting + outcomes measurement cross-departments.
- 3) Use insights about your donors to truly personalize and automate engagement, help audiences feel the relevance of JFK's legacy > move them up the major donor / membership pipeline.



## 7 Mission-driven Successes: Reach > Inspire > Activate



## Fundraising on a Cloud Platform is the Future

Reliable, trusted, and scalable



### Unlocking JFK's Revenue & Impact Potential

#### Legacy Donor Database

Fundraising Data

Fundraising Teams

Desktop, Manual, One Way

Batch & Blast (& Hope)

Legacy Manual Reporting

Limited 1 Vendor Products

Risky infrastructure

#### Modern Platform

360 Constituent Data

All Departments

Productivity Anywhere

Integrated Marketing

Analytics + A.I.

Open Connected Ecosystem

Trust & Data Security

**JOHN F. KENNEDY LIBRARY FOUNDATION**

**2 people's worth of time saved in automation**

**Instant Daily Money reports**

**Countless hours saved logging emails with better data**

***"What we did to modernize was courageous."***  
- Database and Research Associate

In 1989 the John F. Kennedy Library Foundation created the Profile of Courage Award to honor

**Key Results**

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