Nonprofit Cloud Recommendation Map

Follow this path to achieve your goals

Last update: October 2022
This document provides a step-by-step guide of recommended resources that lead you from a beginner to advanced Salesforce user. Follow the suggested path of resources to learn how to implement, realize value, grow, and go further with Salesforce.

Welcome and good luck on your journey.
Implement: Get Started
Begin your journey to success
Implement: Get Started

Get to Know Nonprofit Cloud
- Nonprofit Cloud Base Camp: Welcome Session
  - Get oriented with Nonprofit Cloud and learn how it can help nonprofits meet their missions.

Prepare for Implementing Nonprofit Cloud
- Prepare for Success with Nonprofit Cloud
  - Set goals and learn the best practices for implementing Nonprofit Cloud.

Learn About Nonprofit Success Pack (NPSP)
- NPSP: Feature Configuration Overview
  - Learn what features come with NPSP.

Learn Program Management Module (PMM)
- Manage Programs with Nonprofit Cloud
  - Improve your service delivery with Salesforce for Nonprofits.

WEBINAR
- Nonprofit Cloud Base Camp: Welcome Session

TRAILHEAD
- Manage Your Mission With Nonprofit Cloud
  - Meet the Salesforce technology built for nonprofits.
- Nonprofit Cloud Learning Resources Quicklook
  - Map your learning journey with educational tools and resources for Nonprofit Cloud.

COMMUNITY
- Nonprofit Hub in the Trailblazer Community
  - A public group for anyone interested in how nonprofits are using Salesforce for social good.
- Salesforce.org Nonprofit Events
  - A public group for anyone interested in how nonprofits are using Salesforce for social good.

Additional Investment
- Requires Premier or Signature Success Plan
Implement: Get Started, cont.

7 Get Data into Nonprofit Success Pack (NPSP)
   - Import Data With NPSP
     Learn to use NPSP Data Importer to bring data from outside sources into Salesforce.
   - Follow This Trailmix

8 Set Up Program Management Module (PMM)
   - PMM Documentation
     List of Salesforce.org Program Management Module documentation.
   - Getting Started: Nonprofit Cloud for Program Management
     Learn how to measure and manage your programs using Program Management Module from a Salesforce expert.
   - Follow This Trailmix

Additional resources:
- Webinar: Let NPSP Help You Get Your Data Into Salesforce (Basic)
  How to get your data into Salesforce quickly using NPSP Data Importer, Gift Entry, and Partial Soft Credits.
- Webinar: Let NPSP Help You Get Your Data Into Salesforce (Advanced)
  Learn how to customize NPSP Gift Entry templates and use Advanced Mapping to add custom objects and fields.
- Individual Coaching Session: Getting Started: Get Your Data Into NPSP
  Learn how to import client or donor data into Salesforce using the NPSP Data Import Utility.

Requires Premier or Signature Success Plan and Additional Investment.
Implement: Drive Use
Learn to leverage key functionality and increase user adoption
# Drive Use

## 1. Boost Productivity with NPSP Features

<table>
<thead>
<tr>
<th>Trailmix</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAILHEAD</td>
<td><strong>Productivity in Nonprofit Success Pack</strong>&lt;br&gt;Learn new tools to work more efficiently and boost your organization's impact.</td>
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<tr>
<td>TRAILHEAD</td>
<td><strong>Constituent Email Management with Nonprofit Success Pack</strong>&lt;br&gt;Learn how to manage email to individuals and small groups more efficiently.</td>
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<tr>
<td>INDIVIDUAL COACHING SESSION</td>
<td><strong>How to Use Email Functionality to Engage Constituents</strong>&lt;br&gt;Learn the many ways Salesforce can be used to send email to individuals and groups.</td>
</tr>
<tr>
<td>INDIVIDUAL COACHING SESSION</td>
<td><strong>How to Manage Activities in NPSP</strong>&lt;br&gt;Understand the breadth of features available to help drive productivity at your nonprofit.</td>
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## 2. Enhance Admin Skills

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<tr>
<td>INDIVIDUAL COACHING SESSION</td>
<td><strong>Getting Started: Essential Admin Skills for Nonprofits</strong>&lt;br&gt;Learn essential skills to maintain data security and quality in your Salesforce org.</td>
</tr>
<tr>
<td>ARTICLE</td>
<td><strong>Getting Started: Training Path for a Salesforce Sys Admin</strong>&lt;br&gt;Resources for becoming a Salesforce Admin Trailblazer.</td>
</tr>
<tr>
<td>INDIVIDUAL COACHING SESSION</td>
<td><strong>How to Prevent Duplicates in NPSP</strong>&lt;br&gt;Learn how to create duplicate rules, use NPSP Contact Merge, and configure duplicate management reports.</td>
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*Requires Premier or Signature Success Plan<br>Additional Investment<br>Fundraising<br>Program Management<br>Marketing & Engagement*
Drive Use for Fundraising

Raise Funds with NPSP Features for Fundraising

1. **Getting Started: NPSP for Fundraising**
   - Learn how to set up and configure key features of NPSP for your nonprofit.

2. **Fundraise with Nonprofit Cloud**
   - Learn how to manage donors and donations with Nonprofit Success Pack and Salesforce.

3. **How to Set Up Campaigns for Nonprofit Fundraising**
   - Learn best practices for setting up campaigns.

4. **How to Set Up Levels and Engagement Plans**
   - Create tasks and group constituents automatically with engagement plans and levels.

5. **How to Track Income in NPSP**
   - Learn how to track and manage income from multiple sources in NPSP.

6. **How to Track Soft Credits in NPSP**
   - Learn how to use soft credits to better understand a donor's history and level of influence.

Follow This Trailmix

**Requires Premier or Signature Success Plan**
**Additional Investment**
**Fundraising**
**Program Management**
**Marketing & Engagement**
Drive Use for Program Management

1. Learn Program Management Module (PMM)

Follow This Trailmix

Program Management with Nonprofit Cloud

Track and optimize your services with the Program Management Module.

Requires Premier or Signature Success Plan
Additional Investment
Drive Use for Marketing & Engagement

Follow This Trailmix

INDIVIDUAL COACHING SESSION

How to Set Up Social Studio for Nonprofits and Higher Ed

Learn best practices for success with Social Studio.

VIDEO

Getting Started: Marketing Cloud Feature Overview

In this video, explore Marketing Cloud features and get a quick health check on features you already use.
Realize Value
Achieve peak performance
Realize Value

1. Reports and Dashboards
   - **Webinar** Insights: Reports and Dashboards in NPSP
     - Learn best practices for using standard report types and tools available in Report Builder.
   - **Video** Insights: Reports and Dashboards in NPSP
     - Learn best practices for using standard report types and tools available in Report Builder.
   - **Trailhead** Reports and Dashboards with Nonprofit Success Pack
     - Harness the power of data to tell the story of your organization's impact.
   - **Individual Coaching Session** Insights: Advanced Reports and Dashboards in NPSP
     - Learn how to take your organization's reports and dashboards to the next level.

2. Maintain a Healthy Salesforce Org
   - **Webinar** Org Health for Nonprofit Cloud
     - Learn how to check your system's overall health and get recommendations on how to improve it.
   - **Webinar** Strong Admin, Strong Org: Data Quality Toolkit
     - Learn practical tips to center data quality at your nonprofit.
   - **Webinar** Assess Your Org with Salesforce Optimizer App
     - Get to know Salesforce Optimizer app and how it can help keep your org healthy.
   - **Webinar** Strong Admin, Strong Org: Create a Helpdesk Ticketing System with Flow
     - Walk through building a ticketing system with Salesforce Flow.
   - **Blog** How to Document Inside Your Salesforce Instance
     - Learn how to document your Salesforce setup and customizations.

   - **Article** Healthy Org Workbook
     - Use this interactive workbook to stay on top of your org health.
   - **Individual Coaching Session** Use Design Thinking to Achieve Your Project Goals
     - Learn how to develop or improve your Salesforce processes through the lens of Design Thinking.

Requires Premier or Signature Success Plan  
Additional Investment  
Fundraising  
Program Management  
Marketing & Engagement
Realize Value for Fundraising

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Tableau and AI

Follow This Trailmix

Tableau Basics for Nonprofits
Use interactive dashboards to surface insights for fundraising, programs, and engagement.

Einstein for Nonprofits: Quick Look
Explore how your organization can use predictive scoring to boost fundraising.

Salesforce.org Einstein for Nonprofits
List of Salesforce.org Einstein for Nonprofits product documentation.
Grow and Go Further
Achieve greater success using advanced features
Grow

1. **Automation and Flow**
   - **Follow This Trailmix**

2. **Leverage the Salesforce Ecosystem**
   - **Follow This Trailmix**

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**INDIVIDUAL COACHING SESSION**

**How to Automate with Salesforce Flow for Nonprofits**
Learn how to set up and configure key business processes within a sandbox environment using Salesforce Flow.

**TRAILHEAD**

**Project: Build a Donor Email Flow for Nonprofit Success Pack (NPSP)**
Create a flow to help users quickly send templated gift acknowledgment emails to donors.

**ARTICLE**

**Keep Up with Salesforce.org Releases**
Understand how the Salesforce release cycle works.

**COMMUNITY**

**Nonprofit Release Readiness**
Stay current with the latest Nonprofit Cloud release information.

**COMMUNITY**

**Nonprofit Cloud Certification**
Take your Nonprofit Cloud knowledge to the next level by getting certified.

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Requires Premier or Signature Success Plan Additional Investment
Fundraising Program Management Marketing & Engagement
Grow for Fundraising

1. Align Accounting Data
   - **TRAILHEAD**: Accounting Subledger for Nongorfts and Educational Institutions
   - **ARTICLE**: Accounting Subledger Documentation
   - **Follow This Trailmix**
   - Translate your CRM data revenue into permanent, transparent accounting data.

2. Online Fundraising
   - **TRAILHEAD**: Fundraise with Salesforce.org Elevate
   - **ARTICLE**: Elevate Documentation
   - **Follow This Trailmix**
   - Learn how to collect and process donations with Salesforce.org Elevate.

3. Manage Donor Data
   - **ARTICLE**: Salesforce.org Insights Platform Data Integrity
   - **TRAILHEAD**: Salesforce.org Insights Platform Data Integrity: Quick Look
   - **Follow This Trailmix**
   - Discover how to automatically keep your contact data clean and up to date.

Requires Premier or Signature Success Plan, Additional Investment, Fundraising, Program Management, Marketing & Engagement.
Grow for Program Management

1. Case Management
   - Trailhead: Human Services with Nonprofit Cloud Case Management
     Streamline day-to-day tasks and improve client service with Nonprofit Cloud.
   - Article: Nonprofit Cloud Case Management Documentation
     List of Salesforce.org Case Management product documentation.
   - Individual Coaching Session: Getting Started: Case Management for Human Services
     Learn how to track client engagements from a Salesforce expert using Nonprofit Cloud Case Management.

2. Manage Volunteers
   - Trailhead: Manage Volunteers for Nonprofits
     Use Volunteers for Salesforce to manage events, communicate via your website, and report on participation.
   - Article: Volunteers for Salesforce (V4S) Documentation
     List of Salesforce.org V4S product documentation.
   - Individual Coaching Session: Getting Started: Volunteers for Salesforce (V4S)
     Learn how to successfully set up V4S.

3. Grantmaking
   - Trailhead: Outbound Funds Module: Quick Look
     Explore data architecture to track grants and other nonprofit disbursements.
   - Article: Outbound Funds Module
     List of Outbound Funds Module product documentation.
   - Trailhead: Grants Management with Salesforce
     Manage the lifecycle of grants and drive impact.
   - Article: Grants Management
     List of Grants Management product documentation.
Reach the Summit of Success
Get more resources to help you meet your goals. Explore Recommendation Maps for additional clouds.
Thank You