

The Salesforce for Nonprofits Evaluation Checklist



Budget

- Our organization qualifies for the Power of Us Program (501(c)(3) status)
- We have a realistic budget for implementation, not just a plan to rely on free licenses
- We have (or can pursue) a capacity grant to fund the implementation
- We have a plan and budget for ongoing Salesforce administration support
- We have accounted for third-party integration and AgentExchange tool costs

Capacity

- We have a Salesforce-certified administrator on staff or a deeply tech-savvy staff member with the time and resources to skill up into that role. If not, we have an external partner we can pull in for ongoing support
- Leadership is aligned on the CRM investment and is committed to driving adoption
- Our team has bandwidth for onboarding and training over the next 3-6 months
- We have a plan for ongoing training as staff turns over or our system evolves
- We understand that Salesforce requires ongoing maintenance, not just one-time setup

Data Complexity

- We manage multiple constituent types (donors, volunteers, clients, funders, etc.)
- We run multiple programs or operate across chapters or affiliates
- We need to track grant management within or alongside our CRM
- We want to connect program outcomes data with fundraising data
- Our data is (or will be) clean enough for a successful migration

Integrations

- We have mapped our current technology stack
- Key tools in our stack have verified integrations with Salesforce via AgentExchange or native connectors
- We have identified which integrations are essential versus nice-to-have
- We are prepared to invest in configuring (not just installing) those integrations
- We have a vision for the unified reporting and insights we want to see once our data is connected