



# SALESFORCE SOLUTIONS

## YFC Salesforce Solutions

### Salesforce Local Chapter Master Onboarding Document

Your primary resource for your Chapter's YFC Salesforce Implementation

<https://salesforce.yfc.net>

Revision 7/6/15



THE CUSTOMER SUCCESS PLATFORM  
SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS

## Table of Contents

Intro, a reason why and welcome from YFC USA .....	3
Expectations for this process .....	3
Housekeeping: Contract, Payment and your Chapter's Status.....	4
Primary Contacts.....	6
Applying for the Salesforce Foundation Grant .....	7
Understanding Salesforce .....	9
How to best prepare your Chapter for Salesforce.....	9
Getting your Legacy System data ready for conversion .....	10
END GOAL: How to set a successful pace for your Chapter?.....	11

# Intro, a reason why and welcome from YFC USA

## Salesforce for our Future

For the last 8 years, the NSC and a number of local Chapters have been using Raiser's Edge software (RE). In 2014, we reached a point where an honest assessment was needed. What is the purpose of having RE? It is an expensive enterprise solution. Is the organization as a whole getting value from it? Is it propelling our mission? We decided that RE wasn't supporting our strategic, operational and technical goals. We must try something new.

As we strive for stronger ministry to reach more kids, we come across times when we must ask tough questions. What do we need to grow? What are roadblocks to reaching more kids? What tough truths need to be addressed that are being overlooked? These things can take different forms — an attitude that needs addressed, training that needs to occur or a system that needs to change.

As we have taken a hard look, we believe that RE, a system that should be a relationship management tool, has been reduced into a basic database that isn't being utilized. So we ask the question, "Why?". Why is RE not being used by YFC in the way that it was envisioned? Has technology changed so much so that the software no longer meets our expectations? Are there features RE doesn't have that YFC needs? Has YFC culture or the NSC steered RE off course? We think the answer to all of these questions is "Yes".

Read the full article here: <http://salesforce.yfc.net/blog/>

## Expectations for this process

### From YFC Salesforce Solutions (NSC)

Responsive – Communication is key. Your data is very important and the sooner you can understand it with Salesforce the better. We will move through the necessary steps as quickly as possible, however, we cannot & will not make assumptions about your data.



Continuous Improvement – The Salesforce Base Box is a starting point, however, the sky is the limit with Salesforce. We have an agile development process in place that utilizes a Salesforce Consultant (Fostering LLC) and a group of YFC Chapters and key stakeholders that are constantly looking for ways to improve and/or refine Salesforce for YFC.

Your guide – We are committed to your success. Because of the complexity and importance of doing this well, we will be here to coach you through the migration and training process.

### From your Chapter

Responsive – YFC Salesforce can only perform on what you have approved and the expectations you set within your chapter. The goal is to speak with the appropriate persons (roles) and not make any assumptions about your data. Please respond a.s.a.p. or give an estimated response

time when a question is asked, as next steps will be dependent upon it. Have your staff ready and prepared with the information in this packet to ensure a smooth migration and training.

Complete this Packet – Please do not just skim these pages. They will prepare your chapter for the course ahead. Ask questions and have a goal to understand the process.

Assign an in house Salesforce Administrator – THIS IS REQUIRED. Assign someone at your chapter who can commit to and has the ability to learn more about Salesforce, be the point person for local questions and submit support requests. If you have questions about who might be a good person for this role, please ask.

Better Together – Creating a community is our goal. Communicating and collaborating with other Chapters will enable us all to use Salesforce better.

Adaptive – Yes, you will have to learn something new. Be prepared and willing. If new technology is not your strong suit, find someone at your chapter to help you along.

Realistic – The investment is for a long-term successful relationship management platform. You most likely will not raise 10x more money by simply signing up. Long term, if you use this platform to its potential, you will cultivate better donor relationships, increase internal collaboration and that will lead to more donations.

## Housekeeping: Contract, Payment and your Chapter's Status

### Contract & Payment

For full contract and terms please click here:

[http://fosteringllc.com/wp-content/uploads/2015/06/YFC-SalesforceAgreement\\_020615.pdf](http://fosteringllc.com/wp-content/uploads/2015/06/YFC-SalesforceAgreement_020615.pdf)

For contract questions or terms contact:

Diane Michaelis

YFC Salesforce Solutions Manager

DMichaelis@yfc.net

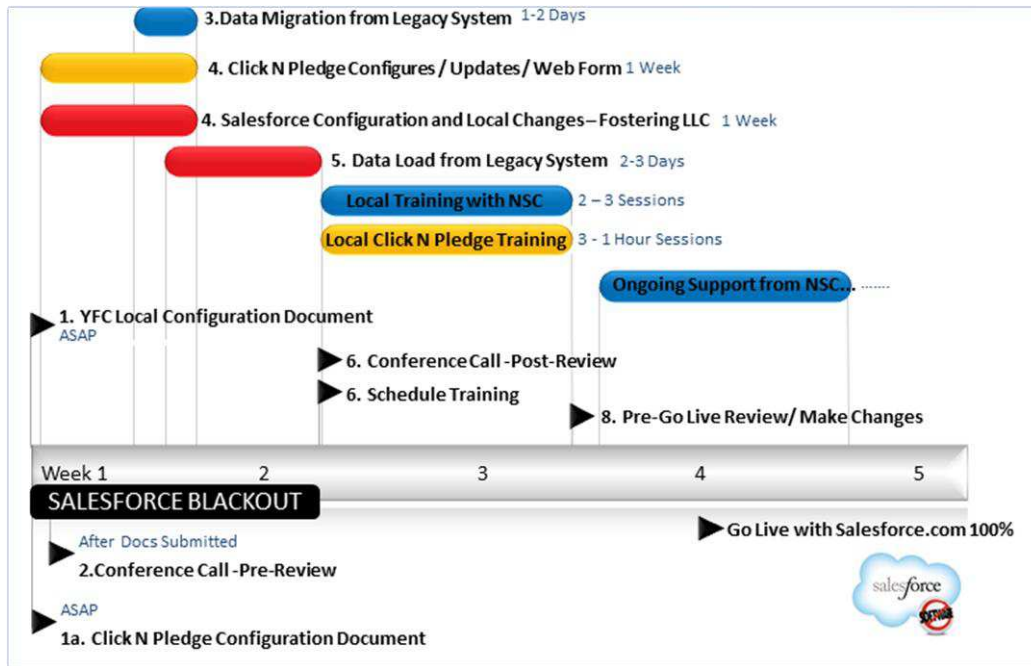
303-843-6770

### Chapter Project Management

For your Chapter's migration status, please reference this page. It is updated in real time by the YFC Salesforce Team. Click on your Chapter's tab on the bottom.

[https://salesforce.yfc.net/training\\_page/my\\_project\\_status/](https://salesforce.yfc.net/training_page/my_project_status/)

## Setting your Chapters timeline



Step 1) Put the right people in the right roles. In Salesforce, assign the following roles to your staff.

- System Admin
- Data Processor
- Development
- Executive
- Marketing
- Program Staff

Step 2) Configure internally the associated timeline

STEP	ESTIMATED TIME TO COMPLETE
YFC Contract signed, Schedule Conversion Date, Salesforce Grant and Click and Pledge application, YFC Salesforce NSC Kick Off Meeting with ED	1 Week
Clean up your existing data	1-3 Week(s)
Mapping Legacy data to Salesforce Fields	1 Week
Export Data from Legacy System (Christine McGee will pull your data from Raisers Edge)	2-3 Days
Import Data to Salesforce and Run Tests (Fostering LLC)	1 Week
Spot Check your data in Salesforce – Sign off	1-2 Days
Salesforce 101 Live Training*	<3 days after data migration for Data Processors (1-2 Sessions)

TOTAL AVERAGE TIMELINE: 3-6 Weeks

\*You should be utilizing the online training platform before your live training:

[https://salesforce.yfc.net/training\\_page](https://salesforce.yfc.net/training_page)

## Primary Contacts



*Sean Wallinger*  
*Contact for: Contract and Chapter scheduling*  
*NSC Manager and overall project success lead*  
*swallinger@yfc.net*  
*303-843-6763*



*Christine McGee*  
*Contact for: Raisers Edge Questions and Data Migration*  
*Raisers Edge Specialist and NSC Salesforce Development Coach*  
*cmcgee@yfc.net*  
*979-595-4359*



*Diane Michaelis*  
*Contact for: Overall Salesforce Project Management and Training*  
*YFC Salesforce Solutions Manager*  
*DMichaelis@yfc.net*  
*303-843-6770*



*Phil Wolfe*  
*Contact for: Click N Pledge process*  
*Chapter Accounting Manager*  
*pwolfe@yfc.net*  
*309-657-3544*



*Matt Foster*  
*Contact for: Data Migration into Salesforce and Technical Support*  
*Owner of Fostering LLC, Salesforce Consulting & Development Partner*  
*Matt@fosteringllc.com*  
*320-245-7955*



*Jordan Junkermeier*  
*Contact for: Data Migration into Salesforce and Technical Support*  
*Support Specialist at Fostering LLC, Salesforce Consulting & Development Partner*  
*Jordan@fosteringllc.com*  
*320-245-7955*

### THE YFC Salesforce HOA (Home Owners Association)

The role of the HOA is to refine, develop and improve the YFC Base Box. Please provide your feedback and ideas for Salesforce via the online ticket system or email [dmichaelis@yfc.net](mailto:dmichaelis@yfc.net).

Sean Wallinger, Associate VP Controller, YFC USA  
Jake Bland, VP Development and Marketing, YFC USA  
Josh Hinman, Executive Director, West Sound YFC  
Jenny Osbeck, Chief Ministry Officer, West Michigan YFC  
Meleea Russell, Development Director, Tacoma YFC  
Doug Burton, Head Coach, VSG Marketing

Matt Foster, Owner of Fostering LLC  
Christine McGee, Director, Donor Systems  
Diane Michaelis, Salesforce Solutions Manager, YFC USA

With input from:  
Matt Schulte - Executive Director, Lincoln Area YFC

# Applying for the Salesforce Foundation Grant

Online Document – [https://salesforce.yfc.net/uploads/default/YFC\\_Salesforce\\_Grant\\_Process.pdf](https://salesforce.yfc.net/uploads/default/YFC_Salesforce_Grant_Process.pdf)

## Steps to Complete the Salesforce Grant Process

**Note:** This is a mandatory/required process before any work can be done on your Salesforce organization. You should be able to get this all done within 30min to 1 hour.

### Step 1: Start a Free 30-Day trial of Salesforce

1. Go to: <http://fosteringllc.com/salesforce/>
2. Click the “Free 30-Day Trial” Download button.
3. Click the green “Free Trial” Button
4. Fill out the requested information completely – use your email address as your username and click the box that says, “I agree to the Master Subscription Agreement.”
5. Fill out the requested information and click the box that says, “I agree to the Master Subscription Agreement.”
6. Click the “Submit” button.
7. You will receive an email from Salesforce with your Free-trial confirmation. In this email click the link “To log in now, click...”
8. After you click the link you will be prompted to create a password. **Please use crmhelp12.** (You can change this later)
9. After you complete this please email matt@fosteringllc.com your username and password.
10. After Fostering LLC receives your login information you will receive another verification email from Salesforce with a 6-digit confirmation code. Please email this to matt@fosteringllc.com as well.

### Step 2: Apply for the Salesforce Foundation Grant

1. Go to <http://www.salesforcefoundation.org/power-of-us/>
2. Read through the “Power of Us Program Overview” and watch the overview video.
3. At the bottom of the page in the left hand corner, click on the “Apply Now” button.
4. Click on the “Log in To Apply” link.
5. Enter you login credentials (if prompted) and/or Click “Allow” when the Power of Us Hub requests permission to access your basic Salesforce information.
6. **Step 2:** You will be promoted to take a simple Readiness survey. Please answer the questions in this way:

Questions:

1. Implementation Vision and Plan (Absolutely)
2. Strong Executive Sponsorship (Absolutely)
3. Internal Salesforce Aptitude (Absolutely)
4. Commitment to Continued Learning (Absolutely)
5. Implementation Resources (Absolutely)  
- Who is your consulting partner or skilled resource? (Fostering, LLC)
6. Data Migration and Integrity (Absolutely)  
(Submit)
7. **Step 3:** Fill out the contact and chapter information as requested.
8. **Step 4:** You will be requested to enter **Your Chapter EIN** and charity ID number, you can look these up by clicking here: <http://nccsweb.urban.org/PubApps/search.php/>

Feel free to use this wording for the following questions:

Please describe your organization's mission (500 words or less).

*YFC reaches young people everywhere, working together with the local church and other likeminded partners to raise up lifelong followers of Jesus who lead by their Godliness in lifestyle, devotion to the work of God and prayer, passion for sharing the love of Christ and commitment to social involvement.*

How do you see salesforce.com helping further this mission?

*Our local Chapter and National Headquarters has done extensive research and prepared time and resources to effectively implement Salesforce.com for our organization.*

*We see Salesforce giving us capacity to:*

- o engage our constituents in a higher relationship based methodology with access anywhere and the SF1 mobile application*
- o increase of efficiency to communicate with our volunteers and constituents*
- o ability to advance with the robust 3rd party app exchange.*

*All of this equals more efficient and effective means to deliver a higher value to those we serve and those who serve alongside us. Investing in our kids today to impact tomorrow.*

9. **Step 5:** Upload documentation of your Chapter EIN as well as the NSC blanket 501c3 document (see attached.) We have established a group approval for the YFC network so there should be no challenges with obtaining approval.

10. When the application has been completed, simply "Submit" as directed.

11. Within 2-5 business days you will receive an email from Salesforce with confirmation of your Salesforce Foundation Grant approval.

12. Please forward this email to [matt@fosteringllc.com](mailto:matt@fosteringllc.com). This will trigger the process of uploading your YFC Base Box to your Salesforce organization.

If you require additional assistance:

*YFC Salesforce Consulting Partner*

Email: [matt@fosteringllc.com](mailto:matt@fosteringllc.com)

Phone: 320-245-7955

*Salesforce Grant Process*

Email: [crmdonation@salesforce.com](mailto:crmdonation@salesforce.com)

Phone: 1-800-NO-SOFTWARE | 1-800-667-6389



# Understanding Salesforce

## Overview

Salesforce.com is a large company, actually the largest CRM Company in the industry. Here are a few reasons why.

- 100% Cloud based (never have to load anything on your computer or server)
- Over 2,500 3<sup>rd</sup> party integrated applications: <https://appexchange.salesforce.com/>

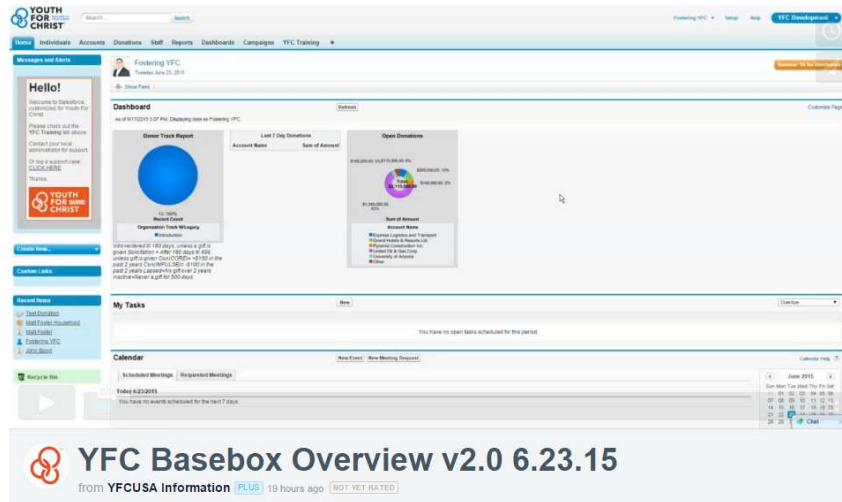
Great resources for your Chapter from Salesforce:

- <http://www.salesforcefoundation.org/>
- Power of Us HUB – Salesforce Non-Profit community <https://powerofus.force.com>

The beauty of Salesforce is that it is the best tool in the industry and because of their philanthropy model, each YFC Chapter has been granted 10 free user licenses.

## YFC Base Box

Salesforce is a robust and widely customizable platform, please watch this video to give a preview of what has been done in the YFC Base Box.



<https://vimeo.com/131684670>

This is a high level overview, please do not feel the need to fully understand everything, we have a training model and are creating self-paced learning options as well.

Please preview this mapping document to visualize how your existing data will show up in Salesforce:

[https://salesforce.yfc.net/uploads/default/YFC\\_USA\\_Basebox\\_Salesforce\\_Mapping3.20.15.pdf](https://salesforce.yfc.net/uploads/default/YFC_USA_Basebox_Salesforce_Mapping3.20.15.pdf)

## How to best prepare your Chapter for Salesforce

1) Understand the process: We have provided a shared project management spread sheet publicly viewable. Please click your Chapter's tab at the bottom of the sheet and follow along the progress. NOTE: there are steps required from your chapter to ensure a smooth process.  
[https://salesforce.yfc.net/training\\_page/my\\_project\\_status/](https://salesforce.yfc.net/training_page/my_project_status/)

2) Getting your team ready: The #1 priority is to get your data process (gift entry) person familiar with Salesforce first. This will allow you to get off of your legacy database and operate 100% in Salesforce. Please go to:  
[https://salesforce.yfc.net/training\\_page/training\\_videos\\_by\\_role/](https://salesforce.yfc.net/training_page/training_videos_by_role/) and watch as many videos as possible. This should preferably be done prior to your Salesforce Training call with the NSC.

3) Helping us configure your Salesforce: In order for Fostering LLC to configure your Base Box to your needs, please complete the local configuration document, found here:  
[https://salesforce.yfc.net/training\\_page/how\\_to\\_documentation/](https://salesforce.yfc.net/training_page/how_to_documentation/) Return this document to dmichaelis@yfc.net.

4) To prepare for your data conversion: Please review this mapping document to better understand Salesforce and where your data should go.  
[https://salesforce.yfc.net/uploads/default/YFC\\_Fundraising\\_Structure\\_of\\_Salesforce\\_Fund\\_Mapping6.23.15.pdf](https://salesforce.yfc.net/uploads/default/YFC_Fundraising_Structure_of_Salesforce_Fund_Mapping6.23.15.pdf)

5) Get ready to spot check/review your data: After Fostering LLC has migrated your data you will be provided a YFC Migration Summary. Please check over donors and donations. You will be asked to sign-off that the conversion process was done correctly.  
[https://salesforce.yfc.net/uploads/default/YFC\\_SALESFORCE\\_REPORT\\_MASTER.pdf](https://salesforce.yfc.net/uploads/default/YFC_SALESFORCE_REPORT_MASTER.pdf)

6) Training: Salesforce 101 Training will take place less than 1 week after you sign off on your data. Again, the more training videos you watch the better training will go. Click here to preview the agenda: <https://salesforce.yfc.net/uploads/default/YFCForceSalesforce101Training-FosteringLLC6.15.15.pdf>

7) On-Going Support: We have an active case management system in place to help answer questions, make changes and suggest improvements. Your Chapter's name will be added after your training here: [https://salesforce.yfc.net/training\\_page/yfc\\_salesforce\\_support\\_form/](https://salesforce.yfc.net/training_page/yfc_salesforce_support_form/). This is where you can submit technical questions as you begin to use Salesforce.

## Getting your Legacy System data ready for conversion

This is one of the most important steps for a smooth migration. If your legacy system is Raisers Edge you may contact Christine McGee, [cmcgee@yfc.net](mailto:cmcgee@yfc.net) and she will contact you to best prepare your data for migration.

One primary step in converting your data is to remap your fund coding to a new Designation, Sub-Designation, Campaign and Staff Association. YFC has had a long line of fragmented ways

that we have kept track of donations and it has caused confusion on the donor side and takes away from the better together mentality. This is an area where many Chapters have a lot of questions and can be seemingly difficult to do. We have provided a document to help you understand the process a bit more:

[https://salesforce.yfc.net/uploads/default/YFC\\_Fundraising\\_Structure\\_of\\_Salesforce\\_Fund\\_Mapping6.23.15.pdf](https://salesforce.yfc.net/uploads/default/YFC_Fundraising_Structure_of_Salesforce_Fund_Mapping6.23.15.pdf)

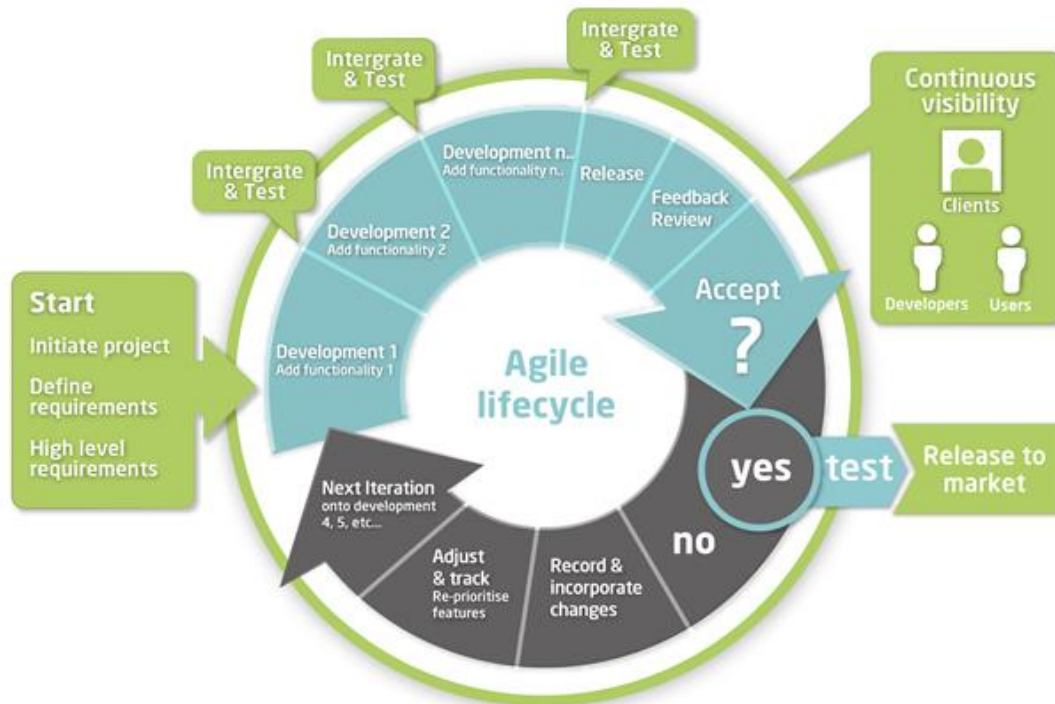
## END GOAL: How to set a successful pace for your Chapter?

The primary metric for measuring success is two-fold.

1) Are you using Salesforce?

- Are your users logging in frequently (a minimum of 4-5 times per week)
- Are the right people doing the right things in Salesforce?
- Are you collaborating on important relationships?

2) Adopting the Agile process. Customer Relationships are never “done” and you should always be thinking of creative ways to use Salesforce to your advantage. This diagram describes the continual cycle of improvement that successful Salesforce users will adopt. It’s a way of thinking that needs to be adopted.



Please note, this is what YFC USA and the HOA is doing every week. We get together on a conference call to discuss, develop, refine, test and deploy new solutions all the time with Salesforce.

Please subscribe to our newsletter to receive the latest updates:

[https://salesforce.yfc.net/training\\_page/sub/](https://salesforce.yfc.net/training_page/sub/)