



Connect Impact and Efficiencies
through Technology Tools:
Salesforce.com

Seth Julyan, OFN



What is Salesforce.com?



What is Salesforce.com? (2)

- Customer Relationship Management (CRM) tool
- A platform for creating custom applications
- Integrates with a wide range of 3rd party solutions
- First 10 licenses (i.e., users) free for nonprofit organizations (\$15,000 yearly value)





Organizations that use Salesforce.com

More than 70,000 for-profits, including:



THE WALL STREET JOURNAL



More than 11,000 non-profits, including:





CDFIs that use Salesforce.com





Use of Salesforce.com by CDFIs

- CRM for Loan Prospects
- CRM for Fundraising
- Marketing and Communications
- Impact Tracking
- End-to-End Lending Solution



Use of Salesforce.com by CDFIs (2)

■ Benefits

- Centralized Data and Reporting
- Remote Accessibility; Usability
- Strengthened Processes

■ Challenges:

- Integration
- Staffing
- Cost (Time or Dollars) for Advanced Uses (beyond CRM)



Resources

- CDFI Salesforce.com User Group
 - www.linkedin.com/groups?gid=4217330
 - mroyles@opportunityfinance.net

- Salesforce.com Foundation
 - Philip Patacca, Account Executive
 - 415-836-3673
 - ppatacca@salesforce.com