



Building a Data Management Strategy for Your Nonprofit

How to begin building a data management plan and unlocking value with Salesforce.

WHITEPAPER

What is Data Management and How Can My Nonprofit Build a Plan?

In a digital-first world, every organization needs a data management plan. Yet, fewer than 25% of nonprofits report having a plan in place. This means data is infrequently shared across departments and rarely used to make decisions or predict future stakeholder behaviors.

A data management plan is fundamental to make an impact and an attainable goal regardless of organization size or technological capacity. An effective data management plan takes into account your mission, staffing, time, budget, goals, existing technology, and more.

When a nonprofit invests in data management, they are more impactful because they can use data to:

- **Put trust at the center of your mission** by ensuring stakeholder data is connected, cleansed, compliant, and secure
- **Make engagement campaigns more intelligent, sticky, and compelling** by activating data for predictive insights
- **Analyze and visualize** data related to all aspects of operations and use this information to make better decisions
- **Amplify and augment** the work your team is doing by using AI to predict outcomes and generate content
- **Improve operational efficiency and the employee experience** by automating data to streamline organization workflows

This whitepaper will explore how to begin building a data management plan and unlocking data value with Salesforce technology.



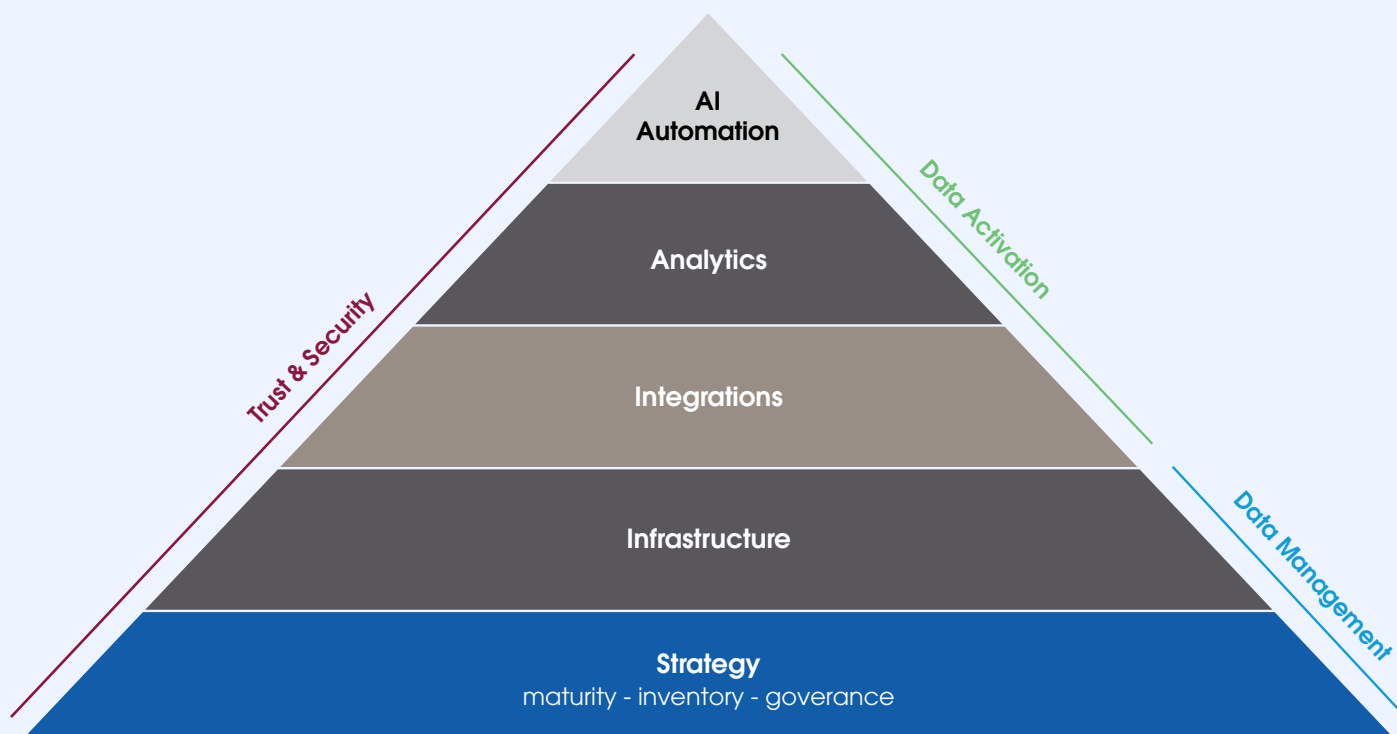
Components of Data Management at a Nonprofit

Strong data management begins with Data Strategy and is strengthened through Data Infrastructure.

- **Data Strategy** is the business plan for your data. A baseline plan should include a [maturity assessment](#) with goals, data inventory, and a governance framework. Think of this as the people and process part of data management
- **Data Infrastructure** is the technology plan for your data. It coincides with your data strategy and grows over time as your goals mature. Data infrastructure should always follow the strategy – never the other way around

When a nonprofit defines its data strategy and makes data infrastructure decisions based on that strategy, it is better prepared to activate its data through integrations, analytics, and automation in a secure manner.

Data Management 101 — the Big Picture



In the next section, you will learn the steps your nonprofit should take to build an effective data strategy and strengthen your operations.

Data Strategy: The Business Plan for Your Data

Building a data strategy doesn't have to be complex. Using a simple three-step approach – maturity, inventory, governance – your nonprofit can begin its data transformation journey.

Step 1: Maturity Assessment and Goals

Start by exploring how your organization uses data today and how you want to use data in the future.

One of the easiest ways to do this is plotting your organization's current and future goals against a data maturity scale. There are a variety of data maturity assessment tools available, including: [NetHope](#), [Data.org](#), and [Tableau](#). Below is an example of points your organization can start to use when looking at maturity and your organization's journey.

	Low Data Maturity	Medium Data Maturity	High Data Maturity
Data Quality	Data is not consistently stored in a central system like a CRM (Constituent Relationship Management). Data is duplicative, incomplete and inaccurate, with little data cleansing or deduplication done. There are no integrations between systems and little effort to backup and secure data.	Data is consistently stored in an organization-wide CRM. There are some integrations between systems with the approach being hard to manage and maintain and data is deduplicated and cleansed periodically. Regular backups of data occur and there are tools in place for quick restoration.	Data is consistently stored in an organization-wide CRM with full staff adoption of the tool as the single view of truth. Integrations are scheduled and governed through a single tool with data being cleansed, deduplicated and unified. Regular backups of data occur and there are tools in place for quick restoration and data usage is monitored and sensitive data is encrypted.
Usage Behaviors	Data is not trusted or seen as a strategic asset and used mostly to record transactions. Reporting on data is tough to do, with integrations being manual, time consuming and error prone.	Data is mostly trusted and considered accurate, and is used to report on past results. Integrations are not fully trusted due to security gaps and frequent errors.	Data is always trusted and considered accurate and complete. Data is used to report on past results and predict future trends, with executives and staff always using data to make decisions. Data is used to drive automation and simplify processes.
Culture	Data is not part of strategic priorities, although the organization may aspire to include data in priorities.	Data is part of strategic priority setting across departments with staff being trained on how to use data and budgets funded at the department level.	Data is part of strategic priority setting at the organization level with training done as part of the onboarding process and data initiatives funded at the organizational level.



Remember to keep your goals attainable. If your organization's data maturity ranks 'low' today, then it might be a reasonable goal to become 'high' within 12 months. Building a data culture is iterative and takes time. It may help to stack rank your priorities in order to make the initiative attainable with the resources you have right now. Small consistent successes in data management will yield major results over time.

As you go through your maturity assessment, take care to document specific tasks, behavior changes, and resources you feel are needed to reach your goal. You will use this information to communicate to leadership as you consider data governance.

Step 2: Data Inventory

In this step, you will compile a list of all the data assets the organization owns. This includes online and offline sources and should include data in primary CRMs, as well as web applications, local servers, and even one-off spreadsheets saved to an employee's computer. A complete inventory will catalogue the data location, owner, description of what's included, frequency/method of update, and any other information the team needs to prioritize and classify the source.

Use this [sample inventory template](#) to get started. You will use this information later when considering the data infrastructure or technology you will need to achieve your goals.

Step 3: Governance

Becoming a data-driven nonprofit means shifting your culture to one where data is trusted and used to make organizational decisions at every level. This requires an organization-wide approach. Start building your governance by identifying a leader for your data initiative. This person does not have to have a technical role but must know how to build collaboration and consensus around your goals.

Complement the role of the data lead with an executive sponsor who can bring visibility to data management at the C-Suite and board level and help you access the resources you need to achieve your goals.

Complete your data team with members from all functional departments – from IT/operations to program managers. This will ensure broad buy-in and provide a Subject Matter Expert (SME) for every area of the business. This group will also be instrumental in completing your maturity assessment and data inventory. Some suggestions when building your data team:

1. Establish regular cadences - Bring the entire team together on a scheduled basis. Be clear about the agenda, time commitment in and out of meetings, and the value each individual adds to the conversation.
2. Build accountability - For some organizations this cross-functional approach will be a new way of working. Consider seeking executive approval to include the data work on individual work plans, so participants have the time and motivation to fully engage.
3. Enable champions - Provide data team members resources to be champions within their own departments. When team members share frequent updates that focus on value, you will elicit timely feedback, build excitement, and lower barriers to change.



Data Infrastructure: The Technology Plan for Your Data

After you establish a Data Strategy, it is time to select a Data Infrastructure, or the tools that your nonprofit will use to realize your Data Strategy goals. This includes decisions about where you will store and how you will unify data. It also extends to tools that activate the data such as analytics, integrations, and automations.

The mix of tools you will need will vary based on data maturity, organization size, IT capacity, and the specific goals uncovered during the strategy development process.

Salesforce technology can help organizations at every stage of their data transformation journey. Our Nonprofit Operations solutions allow you to incrementally achieve your goal of becoming a data-driven nonprofit with solutions across all data use cases.

Solutions for Clean, Secure and Trusted Data

For nonprofits starting their data journey, solutions to support data hygiene and security in the CRM will be top-of-mind. At this stage, organizations will consider adopting:

- **Data Insights** to cleanse and deduplicate CRM data
- **Tableau Prep** to shape, clean, and combine data from multiple source systems and prepare it for Tableau use or output to a database
- **Backup** to allow for quick restoration of data in the case of loss or corruption
- **Shield** to encrypt and monitor the usage of an organization's most sensitive stakeholder information

Solutions for Data Unification

As organizations achieve greater data maturity and higher data volume, they need to consider how to fully unify their data and may need to consider off-platform storage solutions for efficiency, compliance, and computing power.

- **Data Cloud** can help organizations connect, harmonize and activate data, providing organizations a complete and unified profile of stakeholders
- **Heroku and Heroku Connect** can quickly ingest Salesforce data to build sophisticated applications from archiving solutions to stakeholder apps

Solutions for Integrations

Most nonprofits use dozens of applications to engage stakeholders and collect data. This approach can be functionally effective but create data silos. By integrating your data with Nonprofit Cloud, you can begin to unlock the power of automation.

- **MuleSoft Anypoint** is the API-first integration platform for IT leaders that prioritizes reusability, security, and governance
- **MuleSoft Composer** is the business friendly click-not-code integration tool for leaders looking to bring together and automate data directly in the CRM

Solutions for Analytics and Data Visualizations

Nonprofits with clean and trusted data are ready to achieve predictive insights and analytics goals. Salesforce makes this easy with its suite of data insight tools.

- **CRM Analytics** puts the power of power of dynamic visualizations and data predictions in the hands of every CRM user
- [Tableau](#) allows for data analysis, visualization, and sharing to all stakeholders, even those that are not CRM users

Solutions for Predictive and Generative Artificial Intelligence (AI)

As technology continues to develop, a new and key part of acting on your data is augmenting and amplifying the work your team is already doing, by predicting outcomes and creating new content.

- **Einstein** can help you understand your stakeholder behavior and predict who is likely to complete a program or a donor's likeliness to become a major or recurring donor
- **Einstein** also can generate new content to help engage stakeholders. From emails and service requests to (in the future) developing personalized donor engagements and reports, there is something for every team
- **The Einstein Trust Layer** ensures your data is secure and protected when building content

Solutions for Collaboration

Data becomes a part of every employee's workflow – at all maturity levels – when it is collaborative.

- **Slack** allows you to bring Salesforce records directly into a channel for more strategic cultivation of donors, supporters, and program participants
- **Slack + Tableau** makes data insights conversational by bringing analytics and predictions to employee collaboration



Managing Your Data With Data Cloud

Many organizations use a mix of products to create their Data Strategy. One option when looking to manage Salesforce and non-Salesforce data includes using Data Cloud.

This offering helps organizations connect, harmonize and activate stakeholder data. Unify all your stakeholder data at scale, from any source, with out-of-the-box connectors. Anticipate stakeholder needs and preferences with unified profiles that adapt to their activity in real time. Empower teams to create intelligent, automated experiences with unified data.



Customer Success

“With Salesforce, we can put our clients in the driver’s seat and start to tailor care packages around their best interests, making mental health care more accessible for everyone.”



John Slator

Head of IT and Informatics, Everyturn Mental Health

“Salesforce is the hub in the wheel. We have many other spokes, but they all connect and start with Salesforce.”



Gary Flowers

Chief Information Officer, Year Up

In summary, data management does not have to be complex to be effective. Taking the time to plan out a data strategy with attainable goals will help ensure you select the best tools for the job and set up your organization for true data transformation. When you’re ready to begin the technology selection process, we’re here to help.

[Learn more](#)

[Contact us](#)

