

Design and Development of  
Sales Force Non-Profit Success Pack (NPSP) for Tech-Moms.org

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## Abstract

Tech-Moms.org, a 501(c) (3) Nonprofit organization, operational efficiency is deteriorating due to its current information system structure. They are using various systems that require data to be typed and duplicated in every design. The redundant data entry recorded in multiple systems creates questionability of the data's integrity. It is proposed that Sales Force Non-Profit Success Pack is reviewed and implemented as a viable, cost-effective solution to improve operations in creating, recording, and updating data as a single source of truth. The proposed project will require the Organization to look at its current resources, processes, decision-making criteria, and data entry habits. The stakeholders in this project include 3 Co-Founders with the following titles Director of Operations, Executive Director, Director of Marketing, and 3 Program Managers. The IT staff will consist of a Salesforce Administrator and Project Manager who will implement the Sales Force NPSP SaaS solution with the help of an outside contractor. The Co-Founders will need to approve the proposed project, budget, and timeline. Stakeholders will be informed, and training will be provided. This project aims to create a central database as a single source of truth that can collaborate with Tech-moms information systems to minimize duplication of data entry and optimize the transformation of data into meaningful information.

*Keywords:* Sales Force, Customer Relationship Management, Program Management, Donor Management, Information Systems, Nonprofit Information System.

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### **Implementation of Sales Force Non-Profit Success Pack**

Tech-Moms is a 501(c) (3) Nonprofit focusing on helping women transition into a technological career. They offer part-time training programs in the Spring and Fall semester, which builds a student's foundational knowledge in technology and professional network. Tech-moms currently has over 200 alumni students and over 50 donors/sponsors. Tech-Moms averages student registration of over 100 applicants per semester. The Organization can only accept 40 students a semester and needs to keep track of those on the waitlist. It is expected that Tech-Moms.org to grow its Alumni and donor management.

Operationally, the Co-Founders and their Program managers are overwhelmed with duplicating redundant data entry in their various information systems. Issues causing inefficiency in the Non-Profit's profits are: email marketing initiatives with Tech-Moms current CRM, which have been going to spam, redundant data entry of Donors/Sponsors/Partners and students, and duplication/inaccurate entries are degrading the reliability of the data.

The proposed solution is to implement Sales Force Non-profit Success Pack. This CRM SaaS solution will create a single source of truth that will reduce the duplication of data entry and enable the Organization to produce meaningful information. The information made will enable transparency of activities, allow tracking of the progress of programs management and donor management and execute marketing initiatives efficiently.

Material requirements for this project will require a Sales Force Administrator to implement the SaaS CRM. This will need the Organization to look at its current processes, data architecture, and reports for decision-making and create a task list for the Sales Force System Administrator. Schedules will need to be planned and followed to ensure a successful implementation of Sales Force NPSP.

### **Needs Analysis**

As Tech-Moms Alumni and Donor/Sponsors grow, its current information system needs to grow. Currently, it is not able to support its growth, generate reports for stakeholders to make well-informed

decisions making, and is creating redundant data entry that is deteriorating operational efficiency. Its information systems do not collaborate, nor does it share the same central database. The Organization's systems of information contain a CRM system, G-Suite, content management system, and several SaaS solutions to organize and keep track of activities and internal projects. The duplication of data entry in various systems creates an environment where the data is not trusted, and the workload of data entry/data cleaning/data searching is doubled.

### **Problem and Causes**

SaaS CRM resources weren't inherently looked like an option due to lack of funding. With Tech-Moms growing and having support from Utah State grant funding. SaaS CRM vendors with Nonprofit products and solutions were finally seen as viable options, and pricing was made affordable. Other things that contributed to the issue were finalizing what data was important to the Nonprofit Organization and their Sponsors, Donors, and grant Stakeholders.

Other things that contributed to the root problem were not foreshadowing the growth of the Tech-Moms Alumni cohort and the need for data/systems to collaborate to manage the lifecycle of a student's information. In addition to its growing support from sponsors, vendors, and partners.

### **Impact on Each Stakeholder Group**

Stakeholders in Tech-Moms.org is the 3 Co-Founders who have the following title: Director of Operations, Executive Director, Marketing Director, and Program Managers. The Co-Founders are affected in various ways. Due to its current information system not being able to generate reports and make data-driven decisions. The lack of showing reports does not enable Co-Founders to be persuasive in showing how effective their Tech-Moms program on getting more women in technology to their sponsors. The proposed solution will be able to generate reports, manage Sponsors, Donors and enable the Co-Founders to make data-driven decisions. The Co-Founders, mainly the Director of Operations, is highly engaged, ready to execute, and are requesting for the Project Manager to implement to use of Jira to develop the action items needed from Sales

Force NPSP. This will help the System Administrator and Contractor to track action items and complete tasks by business operations and functions.

Programs Managers in this program are also affected operationally as they interact with incoming and alumni students. Program managers must interview prospective students and execute marketing communication plans with Alumni students. There are currently over 200 alumni students and over 100 applicants per semester. The CRM in place, its email marketing solution is not working to fit the needs of the Program Managers as the emails being generated by the CRM are going to spam, so the Program Managers must manually create emails, make calls/text, and manually keep track of who wasn't contacted and who was. The proposed solution should remedy this issue as it will integrate with their emails and be able to collect groups to manage email marketing campaigns. This group is currently in low power and high interest in the power interest matrix as they will be the main users for generating data for students. Program Managers will be updated through emails, and Slack and have access to Jira. Training will also be provided.

With stakeholders all being High interests with different levels of power. Co-Founders will be sent weekly progress emails of statuses of what action items have been accomplished and what were not. In addition, these action items will be generated by the Director of Operations through Jira, and tickets will be created through her to manage the scope of work and requirements. As for the program managers, they will be provided biweekly meetings to showcase what was done and what training material they 1 to study as they prepare to migrate their work to Sales Force NPSP.

### **Solution Alignment**

Due to the nature of the Nonprofit managing personal information and taking donations through credit card payments. We are required to use software that follows data security standards such as PCI (Payment Card Industry Standards) and CCPA (California Consumer Privacy Act). The goal of PCI standards is to ensure that software is:

- Protect Cardholder data
- Maintain a Secure Network

- Implement Strong Access Control Measures
- Regularly Monitor and Test Networks

Maintain an Information Security Policy and CCPA requires:

- That any residents from the state of California can request any business to remove their personal information
- Businesses need to "inform a consumer as to the categories of personal information to be collected and the purposes for which the categories of personal information shall be used."

Alternative solutions that were considered for the identified information system problem were expanding their current CRM system Hubspot, Zoho, and Kindful. All these alternatives provide great donor management, and pricing is within PCI standards, CCPA compliant, and was able to provide a centralized collaborative database. However, these did not provide a solution for student or cohort management.

The proposed solution – The sales Force Non-Profit Success pack, is designed to manage donors, manage programs/cohorts and drive opportunity pipelines. It also integrates and collaborates with other information systems that Tech-Moms uses, such as Slack and G-Suite. What's great about Sales Force is that it could integrate with other emerging technology through its internal app store and Sales Force enables Admins to create relatable objects so that it can grow with the organization's business processes.

### **Cost Analysis**

The cost for the following alternative solutions is as follows:

- HubSpot CMS platform \$300/Month Unlimited Users
  - Nonprofit Discount is 40% - end price is \$120
- Kindly Donor Management and CRM
  - 1000 Contacts \$100/Monthly
  - 5000 Contacts \$200/Monthly
- Zoho CRM Professional



- \$23/month per user
  - Seven users /per year \$161

With Sales Force's "Power of Us Program," Nonprofit Organizations are eligible for ten free licenses to Sales Force Non-Profit Success Pack. This effectively makes Salesforce solution free. If our Tech-Moms need additional licenses, here is the discounted pricing:

- Enterprise Edition \$36/monthly
- Unlimited Edition: \$72/monthly

No hardware will be needed for the implementation of the Sales Force Non-Profit Success Pack.

Materials needed will just be identified for users who will need access to the internet and a chrome browser.

However, due to the complexities of the Sales Force and the high demand for a CRM, Stake Holders are aware that implementation might not go smoothly. So, hiring a contractor to drive the implementation and adoption of Sales Force is being accounted for the costs as a one-time fee. A sales Force rep had quoted me the following for one of their Premier Success partners:

- **First-year adoption and implementation cost: \$2,800**
  - **Accelerator Workshops:** 1:1 coaching sessions with Salesforce experts help you take advantage of the newest features, drive adoption, and increase your team's productivity. Full list of Accelerators [here](#).
  - Faster Response Times for Case Resolution
  - 24/7 Phone Support

### Itemized Costs

Table 1

#### One-Time Expense

Item	Quantity	Price	Total
Licenses	10	Free	0
Additional Licenses	0	\$36	0
Contractor	1	\$2800	\$2800

*Total cost: \$2800*

The items in the table are ten licenses that are free from Sales Force. Additional licenses have been noted on there for pricing if we go over 10. The quantity for that has been set at 0. A contractor has been

added on there for the first-year cost for the purpose of driving implementation and adoption. In lieu of that, it is estimated that the total man hours to plan, implement and execute between System Administrator, Stakeholders and Contractor a total of 500 hours between all 3 to manage implementation and adoption of Sales Force Non-Profit.

Table 2

## Yearly Expense

Item	Quantity	Price	Total
Licenses	10	Free	0
Additional Licenses	0	\$36	0

*Total cost: \$0*

In table 2 shows the expected yearly cost of the Sales Force Non-Profit Success Pack. First ten licenses are free. Any additional licenses have been noted on there for pricing if we go over 10. It is estimated that quantity of licenses will remain under ten and has been set at 0. It is expected that a contractor will not be needed. Overall, expected yearly cost to use Sales Force Non-Profit Success Pack is \$0 as long the need for licenses remains under 10.

### **Justification for Costs**

The cost of project does not have a big price tag. As for the first-year cost is about \$2800 and the yearly cost thereafter is \$0 as long Tech-Moms remains as a 501c Non-profit Organization. Other costs that have not been given monetary value are the man hours that will need to be dedicated to this project as it can last up to 3 – 6 months. This is typical for CRM SaaS implementations and is to be expected.

Other justifications for this project are the high need for a software that can integrate with all Tech-Mom's information systems. Tech-Moms uses G-Suite, Hub Spot, Airtable, Slack and Sales Force can easily integrate with G-Mail and Slack. This enables Program Managers and Co-Founders to easily track who has been reached out to donor-wise and which students have been interacted with on an individual or cohort level.

The SaaS application itself also meets PCI (Payment Card Industry Standards) and CCPA (California Consumer Privacy Act) standards. In addition, Sales Force enables its users to create objects in its virtual environment so that the application can grow with the Organization. This feature is not available in Hubspot, Kindly and in Zoho.

Out of the CRMs reviewed, Sales Force Non-Profit has shown to be the best option. Not only is it the most affordable out of all the CRM's. It also could grow with the Organization long-term with its object creation. In addition, Sales Force has a great training program that can be added onto as an educational piece in the Tech-Moms education and training program for women breaking into technology.

### Risk Assessment

Table 3

#### Risk Register

Sales Force Non-Profit Risk Register						
Asset	Threat/Vulnerability	Existing Controls	Likelihood	Consequence	Level of Risk	Risk of Priority
Current Information Systems	Sales Force NPSP not migrating or collaborating with other systems	Access to the knowledge base of Software and document controls of implementation	Plausible	Moderate	High	High
IT Infrastructure	Sales Force not able to work with current IT environment	Current Infrastructure meets SaaS requirements	Plausible	Severe	Low	High
System Admin & Contractor	Ability to leave	Provide training, Mentorship, and flexible work schedule and pay incentive	Plausible	Severe	Low	Medium
Training	Not enough resources or	Sales Force Trail Head Training course available	Plausible	Severe	Medium	High

	time to complete					
Security of Software	Customer data leaks or user credentials being fished	Trust agreements with SF, CCPA & PCI compliant, and safety features such as MFA are put in place	Rare	Severe	Low	Low

The risk register has currently identified 6 assets that contains risks. The following identified risks are, current information systems, IT infrastructure, system admin, contractor, training, and security of software. These risks have been given the following categories of likelihood, consequences, level of risk and risk of priority to determine which assets are low/high risk.

Highest risk identified with the implementation of Sales Force Non-Profit Success Pack, is the CRM not fully migrating with Tech-Moms current systems and replacing HubSpot (current CRM system). Even though the current CRM is flawed and known by employees as a cloud storage for contacts and opportunity pipeline. The intended purpose for a new CRM is creating a central storage that collaborates with Tech-Moms other information systems. Thus, removing the need for other information systems like Air Table and HubSpot. If the introduction of the new CRM does not function appropriately, then the company was not able to optimize its processes and resources. The consequence of this risk is moderate due to having the current system available until the implementation and adoption has been executed. Level and priority for this identified risk is high due to the need of replacing HubSpot.

The next two identified risks are Tech-Moms System Administrator and outsourced contractor who could possibly leave the project at any given time. It is imperative that these IT staff stay throughout the project. Consequences of any of these members can cause loss of time, resources and increase workload to other team members. The risk of either of these members is low since the workload has been dispersed between the two, enabled flexible schedules, contractor is paid to mentor the System Administrator, and both have been promised incentives of bonuses after completion of project. The priority is medium as the staff has been given provided contracts of incentives by milestones and project completion.

Current IT infrastructure is a risk as the implementation may not be successful if the environment is not suited or fails to meet minimum hardware requirements for the SaaS CRM. The incompatibility could cause great harm to the Nonprofit as it will increase unintended workload of data entry and business processes. This is a high priority to ensure that IT infrastructure meets compatibility of the SaaS CRM and adjust accordingly.

The training of staff is a risk when implementing Sales Force Non-Profit Success Pack. With current staff being overloaded with redundant processes. There is a chance that staff may not have time to make it to schedule training. With Sales Force Training Trail Head platform, employees can train at any time. The Trail Head platform keeps track of their progress, ensures consistency of quality of training and tracks modules completed. Level and priority of this identified risk is high since staff need to be knowledgeable in knowing how to use the system to function in their current roles.

Last risk identified with the implementation of Sales Force Non-Profit Success Pack is customer information being leaked. With the asset of customer information placed with Sales Force security infrastructure and Sales Force being known as large corporation – trust and expertise is expected as contracts have been put in place. Other things to note, is that users of our system can also leak information if their credentials have been phished. To prevent phishing, multifactor authentication has been applied to the Tech-Moms Sales Force instance. With Sales Force being one of the largest corporations in SaaS, level of the identified risk is low and rare.

### **Quantitative and Qualitative Risks**

Current system not migrating and integrating is a qualitative risk. As it will affect employee performance, therefore lowering the quality of work. Another qualitative risk incompatibility of current IT infrastructure. It disables the functionality of collaboration and integration of systems, which also affects the usability of the SaaS CRM. Last qualitative risk is the security of the SaaS CRM. This risk hinders trust of the

data and of the customer. If data loses integrity, then essentially the data becomes untrustworthy and loses credibility which creates more work for the Organization.

The quantitative risk identified is the loss of staff during the implementation, which is either the System Administrator or the Contractor. With contracts and work incentives put in place, it is assumed that the probability of either staff is low. If one leaves, a new hire or contractor can be trained/acclimated to where the project was left off leaving more work for the understaffed Organization. Other quantitative risk identified is staff training not having enough time or resources to do so. As the staff is already understaff and overworked with redundant data entry processes.

### **Cost Benefit Analysis**

The cost of Tech-Moms current information system not working with the Sales Force Non-Profit will be loss of working personnel hours in planning, designing, and developing the implementation of the SaaS CRM. It is estimated that it will be over couple hundreds of hours between Stakeholders, IT staff admin and Program Managers. In addition, due to the pricing of Sales Force NPSP platform being free – Stakeholders will be motivated to rework the loss hours therefore working hours of implementation could be doubled. Ways to mitigate this risk is to ensure that all information systems are inventoried and there is documentation to ensure that Sales Non-Profit Success Pack is compatible with list of inventoried systems.

The risk of incompatibility of infrastructure to meet the Sales Force Non-Profit Success Pack SaaS CRM minimum requirement could be severe if the environment is not setup appropriately. If the environment is not setup appropriately to run the SaaS CRM, then hardware will need to be purchased to meet requirements. This can cause unexpected expenses for purchasing of more assets within the Tech-Mom organization, some loss time on implementation and training. To mitigate, documentation from Sales Force help desk has been acquired to list the following browser requirements:

- Google Chrome
- Mozilla Firefox
- Apple Safari

- Edge Chromium
- Not compatible with Internet Explorer

Currently, all issued laptops are either PC or Mac and everyone has been trained to use web application on Google Chrome.

A loss of either the System Administrator or Contractor during the project will cost Tech-Mom's loss of working hours, money, training and increase workload on staff until a replacement is found. Ways to lessen the risk of losing either one of the IT staff is to detail out a work break down structure by desired outcomes, create flexible work hours, performance incentives based on milestones have been created with bonuses when a project is completed. It is hope that these incentives create motivation to accomplish tasks on time and inspire loyalty to the project.

Absence of training of the Sales Force Non-Profit CRM can render the system useless to the Organization. As employees won't be able to fully utilize the SaaS CRM to its fullest capabilities, thus causing inefficiencies in business processes and cause the data to be untrustworthy. This will also affect upper management on not being able create meaningful information to their sponsors, grant donors and partners. If Program Managers are trained properly, then they will be able to reduce the usage of using several systems, create a single source of truth for the organization data and be able to efficiently reach out to potential students and communicate effectively with Tech-Mom Alumni.

As Tech-Moms gathers personal information on their students and donors, it is imperative that the vendors product has security measurements in place to protect the data. If not, the Nonprofit Organization can lose donors, sponsors, and students. If a breach of data occurs donors, sponsors and students might desire reparations of their data being mismanaged. Selection of a vendor with track record of security, security features (MFA), experience and trust help our Nonprofits resolve in legal issues with data.

### **Mitigation of Risks**

To mitigate the risk of the Sales Force NPSP not fully meeting the criteria of the Organization - the Project manager will create detailed documentation of requirements. The Project Manager will meet with the Co-Founders to record what information is being documented and what systems is being used for what purpose. Also, interviews with program managers will be conducted to gather feedback. The Project manager will then map out the workflow processes along with the data that is being recorded and show findings with Stakeholders and Program managers of the identified workflow processes. Once the workflow processes are verified then the Project Managers can articulate the needs of the Organization to potential SaaS CRM vendors. This will enable accurate matching with vendor solutions.

Once the SaaS CRM vendors are identified, a collection of pricing and system requirements will be detailed to out. The data will empower Stakeholders to decide whether current infrastructure needs to be upgraded or not. Overall, the findings will build confidence in ensuring what IT infrastructure will be needed to support the new SaaS CRM, determine budget and which solution will be overall cost effective. Currently, Sales Force Non-Profit Solution can be supported by current infrastructure and is the best cost overall.

With employees at risk of not being trained properly on the new solution. This can be mitigated with appropriate training materials and scheduling. With Sales Force Non-Profit Solution, comes with Sales Force Trail Head - an interactive training platform. Modules by functions of how to use certain tools in sales force is available for training purposes on Sales Force Trail Head. A list of modules has been collected to provide clarity of what training modules is expected to be completed by Employees. Employees will be asked to create logins and to share profiles with project managers to track progress of their training with Sales Force. This enables flexibility of training and consistency of training.

Mitigation of security risk can be done through choosing a vendor that is compliant with CCPA, PCS and has a data breach protocol in place. In addition, with their product having safety precaution features such as multifactor authentication. With Sales Force being the chosen vendor, it has strong reputation and track record for protecting consumer data.



## **Justification of Approach**

Agile processes will be used to approach the planning of the Sales Force Non-Profit Implementation. With stakeholders who are also the main users, they desire to focus on "interactions over processes/tools, the working software, collaboration and responding to change" (Agile Manifesto). Other methodology considered for this was Waterfall, but due to its predictive and strict nature, Stakeholder preference was to stick to Agile for its iterative and incremental approach. With the nature of Sales Force Non-Profit Success pack, processes can be added after implementation by creating objects in Tech-Moms Sales Force instance. In addition, Tech-Mom founders are wanting their personnel to be using industry standard project management methodologies and to be using tools like Jira to visualize the product road map and see a backlog of tasks, issues, and user stories.

With all those things being stated, a Scrum framework will be applied while Jira will be used extensively to schedule the work which will create a product road map with defined Epics. Once the identified Epics have been created then a backlog of work will be issued as a task, user story or issue. These Epics will contain work orders and will be used as KPIs to complete a Sprint. The Epics identified for this project will contain the project management phases for the implementation of the Sales Force instance. Then Epics of Donor/Grant Management, Student Management, Marketing Campaigns and Program Management will be created. As the stake holders, would like the program managers and themselves to simultaneously use the application as we are implementing the application. Weekly standups will be occurring to keep track of work orders/backlog of work and to ensure that it supports strategic goals of using a centralized database to optimize overhead cost and have a reliable source of truth that can generate information to drive data driven decisions.

## **Project Resource Management Plan**

The resources needed to design, develop, and implement Sales Force Non-Profit for Tech-Moms.org are financial resources, human resources, communication resource and scheduling resources. Financial

resources needed for the project is funding for the System Administrator, Project Manager, and a Sales Force Consultant for the implementation of the new SaaS CRM. No funding is needed for the monthly cost of Sales Force Non-Profit at this current time since only less than 10 licenses will be used. Human resources needed for the project is a Project manager, Sales Force Consultant and System Administrator for the duration of the implementation and training of the new SaaS CRM application. Communication resources will be tools like Slack. Scheduling resource needed will be personnel time for implementation and training.

### **Resources**

The needed human resources to drive implementation and adoption for this project are Project Manager, System Administrator and Contractor (Sales Force Consultant). Project managers will be responsible for organizing, collecting requirements, driving Agile methodology, manage stake holders, IT staff and Program Managers. The System Administrator and Contractor will be executing SaaS CRM Implementation, ensure the current information system and environment collaborates with the new solution, create objects as needed in the Sales Force Application to meet business requirements/functions and provide insight to Project Manager and Stakeholders on the capabilities of the SaaS Application.

The financial resources needed for this project is funding for a Project Manager, System Administrator and Contractor (Sales Force Consultant) for the duration of the implementation and adoption of this project. It is estimated that a contractor from Sales Force costs \$2800 for the year and only part time work will be needed from the Project Manager and Sales Force Administrator during the implementation and training of Sales Force Non-Profit Success Pack. No funding is needed for the monthly subscription of Sales Force Non-Profit Success Pack, as it is free for Nonprofit organizations.

The communication resources needed for this project are Slack and Jira. Slack will be used for daily and weekly communication of the project. And any formal documentation will be sent through emails. Jira

will be used to create scope of work, user stories and drive work order request which will be used as KPI's to track progress of the overall project and see how users are responding to the new SaaS CRM.

Scheduling resources needed for this project is time allotted from Stakeholders, Program managers with Project Manager, System Administrator and Contractor. For planning the project, scheduling the project, implementing the project, testing the application on staff for usability and training everyone in the Organization on how to use Sales Force. In addition, to integrating the SaaS CRM with G-Suite, Slack and Wix and making sure it is compatible with current infrastructure and that staff are using it appropriately.

### **Justification of Resources**

The following justification for the human resources is for the purpose of making sure that the project will be successful. Project manager will drive requirements, keep track of project progress and within budget. System Administrator and Consultant will ensure that Sales Force Non-Profit Success pack will collaborate with Tech-Moms current information system and thrive on the infrastructure without any need of purchasing any more hardware assets. In addition, the System Administrator and Consultant can create objects in the platform to meet business requirements/functions and training of Tech-Mom staff. It is imperative that these resources are provided, and if not, then the project will fail.

Financial resources requested will ensure that human resources will be funded for. Without the human resources, the project will fail. As funding for the SaaS CRM is free for Tech-Moms. And it enables Tech-Moms to reduce the need for other information systems like HubSpot and Air table.

The requested communication resource like Slack and Jira will provide traceability, high level to low level overview of work and accountability of the project. The resource will drive teamwork, collaboration, and transparency of who is doing what. If this resource is not provided, project will not be efficient and cause miscommunication.

The scheduling resource needed is for the purpose of working around business operations. Project Managers and the two IT staff (System Administrator and Consultant) will first work on planning, defining requirements with Stake Holders and Program managers. Then once the Sales Force Non-Profit Success pack is deployed onto production. Then Project Manager and Consultant can provide training through the Sales Force Trail Head by defining what modules to take for the Program Managers and Stakeholders. From there, as the application is being used feedback will be collected to see if any new requirements are generated for the purpose of driving user adoption, consolidation of systems and optimization of resources.

### **Resource Allocation Plan**

Human resources allocated on this project are the Project Manager, System Administrator and Contractor (Sales Force Consultant). The Project Manager will be allocated for the sole purpose of that project will be completed on time and within budget. System administrator will be allocated for the purpose of ensuring that Sales Force is production ready, licenses are issued to the appropriate staff, safety features like MFA are applied on the application, Objects are created as necessary to meet business functions, meet Stakeholder report requirements and the occasional training of employees. Sales Force Consultant will be allocated as a backup administrator, but core focus will be ensuring insight is provided on capability of Sales Force and training of Tech-Mom Organization by job function to ensure that adoption happens efficiently.

### **Gaps and Impact on Other Projects**

This project will fill the gap of replacing the inefficiency of HubSpot CRM and enable consolidation of systems and enable one single source of truth. With, this helps Stake Holders create meaningful information to their Donors and sponsors. Enable Program managers in managing the student life cycle and communicate effectively with Tech-Mom Alumni. As the current CRM cannot send marketing email campaigns efficiently, unable to collaborate with other information systems like Air Table or Wix. Which is causing redundant work in data entry with every information system and the lack of the systems collaborating is deprecating the trustworthiness of the data.

This project will be prioritized overall projects, especially during the adoption phase. As this will determine the usability and successfulness of the project. As it will alleviate many redundant data entry processes, create a single source of truth, optimize resources, consolidate systems, and improve operational efficiency.

### **Project Plan**

The project plan will be going through a Flow-Base Agile methodology while applying Scrum like framework(Manifesto for Agile Software Development). A Jira Road map of the implementation of Sales Force Nonprofit Success Pack will contain the project management phases which are initiation, planning, execution, Monitoring & Control and Maintenance of the actual software implementation onto Tech-Mom's information system infrastructure. This is to ensure that the SaaS CRM is working appropriately in Tech-Moms IT infrastructure and can collaborate and integrate with the other information systems. Then after maintenance phase, Epics have been added by product features which are Donor/Grant Management, Student Management, Program Management and Campaign Management. Each of these Epics will contain tasks, issues, and user stories to make sure that product features are working for the staff. Start of the project will be in June 1, 2022 to December 2022.

Table 4

Jira Road Map of Sales Force NPSP Implementation

## Roadmap



## Scope

Scope of boundaries have been decided that the scope of work will be limited to the capabilities of Sales Force with managing donors, grants, students, programs, and marketing outreach initiatives. The sole purpose of implementing Sales Force NPSP is to create a centralized dynamic database as a single source of truth. In hopes that it can integrate, consolidate, and collaborate with its current information infrastructure and empower Stakeholders with information to make data driven decisions. In addition, training will be provided per product feature and ensure that Stakeholders and Program Managers are satisfied with each product features. Things that will be considered out of scope for this project will be automating workflow, generating reports and nothing relative to improve the workflow of Program Manager or Stakeholders

## Assumptions

It is assumed that the System Administrator or Sales Force Contractor will continue to provide support for Sales Force once the implementation project closes. Furthermore, it is assumed that once Sales Force is

implemented that issues won't arise, but Sales Force provider and System Administrator will be able handle any issues that arise through its virtual help desk. Another assumption is that training won't be able to happen during the implementation, which is not the case as Sales Force Trail Head offers learning modules with available sand box Sales Force instances to train on.

## **Project Phases**

The Sales Force Nonprofit Success Pack implementation will be broken down into 9 epic phases on the Jira Road map. Things to keep in mind that we will be following a flow-base Agile were sprints won't have the same timeline of 2 weeks, it is assumed that it will take no less than 2 weeks but maybe more than 2. The first 5 epic on the road map will be following the 5 project management phases and then the next 4 phases will be focused on product features to ensure that Stakeholders and Program Managers are able to utilize and optimize their processes. First epic will be the Project initiation which will contain the gathering and identifying of stakeholders, developing the project charter, and getting agreement upon identified problem. This will be Sprint 1 starting on July 11, 2022 and concluding on July 24, 2022.

Sprint 2 will be Epic Project planning phase. In this phase, the scope of work will be defined between the Project Manager and Stakeholders. Then once the project scope has been created, various solutions will be looked at and evaluated, then risk assessment will be created and a solution will be chosen. From there a work break down will be produce for the Stakeholders to approve. Along with a proposal of resources to be secured. This phase will start July 25, 2022 and end August 05, 2022.

Sprint 3 will be Epic Project Execution – Deploy NPSP. In this phase, Sales Force Nonprofit Solution Success Pack will issued to Tech-Moms and will get access to its online instance. Once the instance is made available, then the System Administrator and Contractor will install Nonprofit Success Pack packages in the deployed instance. Then System Administrator and Contractor can move forward with integrating Sales Force NPSP with G-Suite, Slack and Wix. Once integration and connectivity has been completed with Tech-Moms information system then System Administrator and Contractor can move forward with migrating data from HubSpot to Sales Force. Once migration of data from HubSpot to Sales force is complete, then sprint 3 will be

completed. This is expected to start August 05, 2022, and complete on August 26, 2022. This sprint is expected to be about 3 weeks long.

Sprint 4 will be Epic Project Monitor and Control. In this sprint, Multifactor authentication will be initiated, and logins will be created for the Tech-mom Co-founders and Program Managers. Once logins have been issued then each person can test the MFA that had been installed to ensure that it is working appropriately. In addition, training videos will be sent out on how to get acclimated to their current Sales Force instance and how to add the Sales Force app with their G-Suite so they can easily send emails and keep track of tasks on either their G-Suite or Sales Force instance. And other things that will contain in this sprint, is giving users access to the Jira board so they can issue work requests. This sprint is expected to start August 26, 2022 and end September 9, 2022.

Sprint 5 will be Epic Maintenance and Closure of the deployment of Sales Force NPSF. In this sprint, all Tech-Mom employees will receive their logins for Sales Force Trail Head and will be taught how to use the Sales Force Trail Head. Once they have been trained on how to use the training platform. Training of the Donor & Grant Management feature, Program Management feature, Student Management feature and Marketing campaigns will be sent for staff to complete on their time. In addition, System Administrator and Contractor will be installing the product features on to live production so that once the staff completes training, they can start using the platform that already contains the migrated data of their donors, sponsors, and students. This sprint will occur from September 9, 2022 to October 01, 2022.

Sprint 6 will contain 4 Epics which is Donor & Grant Management, Student Management, Program management and Marketing Campaigns. The purpose of have these Epics all happening simultaneously is for the purpose of having the Tech-Mom staff to fully use Sales Force. In this sprint, Stakeholders and Program managers will be using the system, give feedback and issue work orders for system improvement. This sprint is expected to happen from October 01, 2022, to January 27, 2023.

Sprint 7 will be the closure of the Sales Force implementation project will start on February 06, 2023, and end February 28, 2022. In this spring, feedback will be gathered from all personnel on their experience

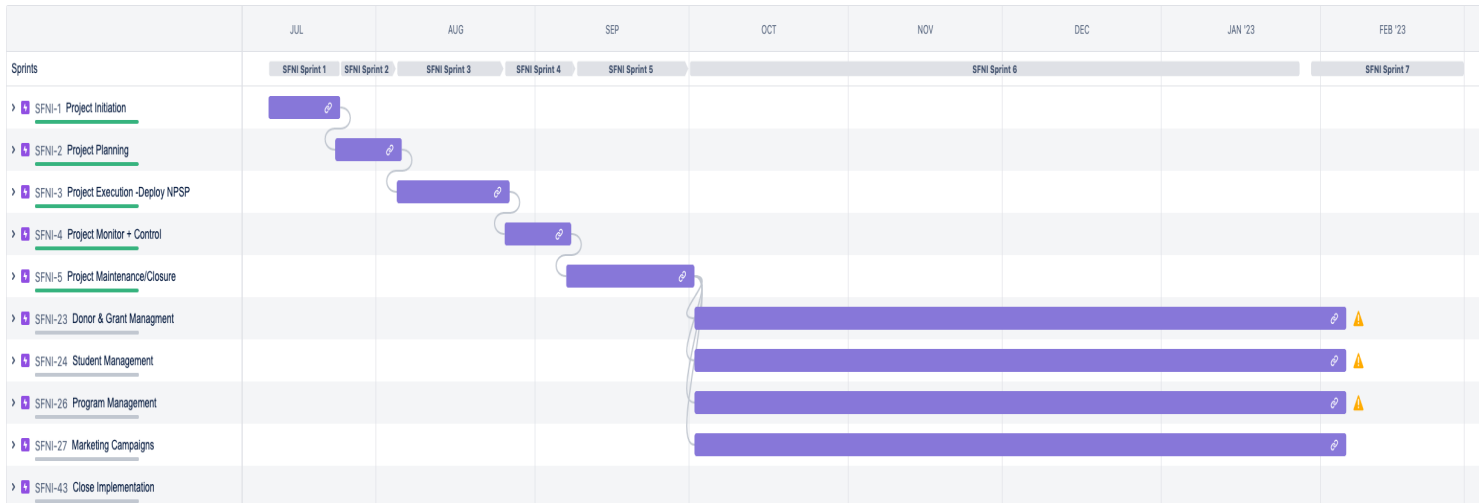


with Sales Forces. Then personnel will be sent invites to the Sales Force Work Request Jira Board where they will be able to issue user stories and Sales Force user issues.

## Timelines

Table 5

Jira Road Map of Sales Force NPSP Implementation with Sprint Timeline



Proposed timeline will be outlined with dates and expectations of days to complete. Things to note that flow-base Agile sprints will be implemented. So, each Epic will either be about 2 weeks more. First epic will be the Project initiation which will contain tasks that consist of gathering /identifying of stakeholders, developing project charter, and getting agreement upon identified problem. Purpose of this is to create the foundation and support of the project. Sprint 1 is expected to be completed in 13 days.

Sprint 2 will be Epic Project planning phase. In this sprint, Project Manager will work with Stakeholders to define and finalize scope of work. Once the project scope has been created, various solutions will be evaluated, and a solution will be chosen between the Stakeholders. Once the solution is chosen, a risk assessment will occur and then a work break down will be produce for the Stakeholders to approve. After the approval, a proposal of resources will be secured. This sprint will take about 12 days and will ensure what the identified solution is, understand the risks and what resources will be needed for the project.

Sprint 3 will be Epic Project Execution – Deploy NPSP. In this phase, Sales Force Nonprofit Solution Success Pack will be deployed, and Tech-Moms will be issued an instance. From there the System

Administrator and Contractor will install Nonprofit Success Pack packages in the deployed instance and logins will be issued for the System Administrator, Contractor and Program Manager. Then System Administrator and Contractor can move forward with integrating Sales Force NPSP with G-Suite, Slack and Wix. This will make sure that the deployed instance work with Tech-Mom's information systems. Once integration has verified to work with Tech-Mom's environment, then System Administrator and Contractor can move forward with migrating data from HubSpot to Sales Force. After migration from HubSpot to Sales force, then sprint 3 will be completed. This sprint is to ensure that Sales NPSP environment works well with Tech-Mom's environment and works well with other information systems. This is expected to last 21 days.

Sprint 4 contain Epic Project Monitor and Control. In this sprint, Multifactor authentication will be initiated, and logins will be created for the Tech-mom Co-founders and Program Managers. Once logins have been issued then each person can test the MFA that had been installed to ensure that it is working appropriately. In addition, training videos will be sent out on how to get acclimated to their current Sales Force instance. Other things that will contain in this sprint, is giving users access to the Jira board so they can issue work requests. The purpose of this sprint is to ensure that user's have access, security of user's have been implemented for control measures and that user's become familiarized with their Sales Force instance. This sprint is expected to last 14 days.

Sprint 5 will be Epic Maintenance and Closure of the deployment of Sales Force NPSP. All Tech-Mom employees will receive their logins for Sales Force Trail Head and will be trained on how to use the training platform. Then training will occur for the following features of Donor & Grant Management, Program Management, Student Management and Marketing campaigns. In addition, System Administrator and Contractor will be installing the listed features on to live production. The purpose of this sprint is to prepare the Tech-Mom organization on how to use Sales Force into their everyday function. This sprint will take about 21 days to complete.

Sprint 6 will contain 4 Epics which is Donor & Grant Management, Student Management, Program management and Marketing Campaigns. These Epics will all be happening simultaneously and is for the

purpose of having the Tech-Mom staff to fully use Sales Force and get feedback. The purpose of this sprint is to make sure Stakeholders and Program managers are adopting Sales Force into their Organization's operations. Sprint is expected to last 88 days.

Sprint 7 will be the closure of the Sales Force implementation project. In this sprint, feedback will be collected on the experience of Sales Force and prepare the Organization for ongoing maintenance of Sales Force. Purpose of this sprint is to prepare Tech-Mom organization on how to maintain Sales Force and give personnel access to Tech-Moms Sales Force Jira Work Board request where they will be able to issue user stories and issue tickets. This sprint is expected to last 22 days.

### **Dependencies**

This implementation project hinges upon the approval of the Stakeholders, who are the Founders of the Tech-Mom organizations. As the Co-founder have the final say on budget and resources. If the Co-Founders deny the project, then they themselves pay the price of not having a centralized database as a single source of truth that can exponentially drive their decision making with valid information. And the Organization will be stuck with redundant data entry processes with every system they have.

### **Risk Factors**

It is essential that risks are made aware of so that Tech-Moms is risk aware rather than risk averse. The risks that Tech-Moms should be aware of with this project are:

- Current Information System
- System Administrator and Contractor
- Training
- Security of Software
- IT Infrastructure

Not being aware of these risks can hinder projects from being completed or increase the risk of extending dates and increase costs. Proposed ways to mitigate risks is to create a mitigation plan. For example, if the

proposed solution does not currently work with information systems, then we will need to be prepared to either find a different solution or upgrade environment for the solution to work – this can be considered as financial risk factor. Human risk factors that have been considered is the System Administrator and Contractor leaving, it is expected that Tech-Mom's stakeholders and program managers will have to wait and expend costs on finding another IT staff that can support their Implementation project. Training can also be factored in as human risk if training does not work. As this can render the implementation useless and Tech-Moms will be stuck with their old redundant data entry practices. This can have severe and long-term operational issues. As for environmental risk factors, Security of Software and IT infrastructure would fall into that category. Implications for these can cause the system to be useless for use due to incompatibility or create havoc if data is leaked.

### **Important Milestones**

Make sure to include clear start and end dates in the future for each of these milestones, and then discuss in detail. Yes, you are repeating yourself, and that is absolutely expected.

The Sales Force Nonprofit Success Pack implementation will be broken down into 7 Sprints with 9 epic phases on the Jira Road map. Not all sprints will have timeline of 2 weeks, it is assumed that it will take no less than 2 weeks but maybe more than 2. The first 5 epics on the road map will be the 5 project management phases and then 4 phases will be focused on product features to ensure that Stakeholders and Program Managers are able to utilize and optimize their processes. Here are the milestones by sprints:

- Sprint 1 Epic Initiation – start July 11, 2022, and end on July 24, 2022.
  - In this sprint gathering /identifying of stakeholders, developing project charter, and getting agreement upon identified problem.
- Sprint 2 Epic Planning – start July 25, 2022, and end August 05, 2022

- Project Manager and Stakeholders will define and finalize scope of work. Various solutions will be evaluated, and a solution will be chosen. Then risk assessment will occur, and a work break down will be produce. After the approval, a proposal of resources will be secured.
- Sprint 3 Epic Execution Deploy NPSP – start August 05, 2022, and end August 26, 2022
  - Solution will be deployed, and System Administrator and Contractor will install Nonprofit Success Pack packages in the deployed instance. Then System Administrator and Contractor can move forward with integration of Sales Force NPSP with G-Suite, Slack and Wix. Once integration in Tech-Mom's environment is complete, System Administrator and Contractor will migrate data from HubSpot to Sales Force.
- Sprint 4 Epic Monitor and Control - start August 26, 2022 and end September 9, 2022
  - Multifactor authentication will be installed, and logins will be created for the Tech-mom staff. Once logins have been issued, training videos will be sent out on how to get acclimated to their current Sales Force instance.
- Sprint 5 Epic Maintenance - start September 9, 2022and end October 01, 2022
  - All Tech-Mom employees will receive their logins the training platform. Then training will occur for the following features of Donor & Grant Management, Program Management, Student Management and Marketing campaigns. Then System Administrator and Contractor will be installing the listed features on to live production.
- Sprint 6 Training - start October 01, 2022, and end January 27, 2023
  - Continuous feedback of user usaged will be gathered on a biweekly basis for Donor & Grant Management, Student Management, Program management and Marketing Campaigns as Tech-Mom organizations works with Sales Force.
- Sprint 7 Implementation Closure - January 27, 2023 and end February 28, 2022

- In this sprint, Tech-moms staff will prepare for closure of Implementation project and transition to ongoing maintenance of Sales Force. Tech-Mom organization will be given personnel access to Tech-Moms Sales Force Jira Work Board request where they will be able to issue user stories and issue tickets.

### **Details of Project Launch**

The Salesforce NPSP implementation will launch on July 11, 2022 and will follow the outline schedule in the project plan. Stakeholders are aware that due to the nature of our project following flow-based Agile principles, projects have been given some buffer days and therefore are expected to have a minimum of 12-14 days of execution or more. On the other hand, it is important to start the schedule as soon as possible so that Tech-Moms operations can have centralized single source of truth in their information systems.

### **Strategy for Implementation**

Strategy to implement Tech-Moms Sales Force NPSP will be a combination of Phased rollout and Big Bang strategy. Due to the nature of transitioning from one SaaS applications to another. A Phased Roll out enables employees to do a data migration, train on sandbox instances and fully transition away from the previous system. Once migration and training are completed then the previous system will no longer be available for use. The lack of availability of the previous system, enforces all employees to fully utilize and learn Sales Force which is how the next method will be the Big Bang method (e2b\_Marketing).

For this implementation project, System Administrator, Contactor, and a Project manager will handle the SaaS CRM implementation. Since the systems being dealt with is a CRM with enterprise capabilities, the enterprise architecture meets criteria. As for disaster recovery, with both applications being a SaaS platform, a backup plan data storage plan will be required just in case the providers fail. In addition, since the SaaS applications are guaranteed security practices are in place, then the vendor can handle legal issues.

### **Documentation Deliverables**

The documentation needed for delivery of the project will be a Service Agreement with Sales Force, knowledge base of the software from the user and trouble shooting perspective. Service agreement will list out pricing by users on a monthly basis along with the legal responsibilities of Sales Force and it's customer. Training guide or access to a knowledge base will also be needed. This will enable users some kind of access to training and provide consistent information on how to use the platform. In addition, access to kind of digital trouble shooting guide enable IT staff to troubleshoot minor errors in the system.

### **Hardware and Software Deliverables**

Software deliverables for this project will be installations of the NPSP features. Those are donor management, grant management, program management, student management and marketing campaigns. This version of Sales Force was designed for a Nonprofit organization. No hardware deliverables will be needed for this project as it is a SaaS application.

### **Evaluation Framework**

Project will be evaluated as soon as the solution is chosen, and application has been installed and deployed throughout the project. The Project Manager, System Administrator and Contractor from Sales Force will act as quality assurance personnel throughout the entire project. They will ensure that Sales Force NPSP system has meet the requirements at the beginning of the project. Once the solution has been deployed and appropriate package modules have been installed, Project Manager and System Administrator will gather continuous feedback from the team and users on whether the Sales Force is meeting their needs or not. If there is evidence found that solution is not meeting the needs of the team, then the IT staff should implement mitigation strategies from risk assessment or find alternative solutions to solve user needs. Tech-mom staff will have access to Tech-Mom Sales Force Jira board where they will be able to provide feedback, send issue tickets and user stories. Key performance indicators on this project will be based on project completion, cost and employee satisfaction.

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## Tables

Table 1

## One-Time Expense

Item	Quantity	Price	Total
Licenses	10	Free	0
Additional Licenses	0	\$36	0
Contractor	1	\$2800	\$2800

*Total cost: \$2800*

Table 2

## Yearly Expense

Item	Quantity	Price	Total
Licenses	10	Free	0
Additional Licenses	0	\$36	0

*Total cost: \$0*

Table 3

## Risk Register

Sales Force Non-Profit Risk Register						
Asset	Threat/Vulnerability	Existing Controls	Likelihood	Consequence	Level of Risk	Risk of Priority
Current Information Systems	Sales Force NPSP not migrating or collaborating with other systems	Access to the knowledge base of Software and document controls of implementation	Plausible	Moderate	High	High
IT Infrastructure	Sales Force not able to work with current IT environment	Current Infrastructure meets SaaS requirements	Plausible	Severe	Low	High
System Admin & Contractor	Ability to leave	Provide training, Mentorship, and flexible work schedule and pay incentive	Plausible	Severe	Low	Medium

Training	Not enough resources or time to complete	Sales Force Trail Head Training course available	Plausible	Severe	Medium	High
Security of Software	Customer data leaks or user credentials being fished	Trust agreements with SF, CCPA & PCI compliant, and safety features such as MFA are put in place	Rare	Severe	Low	Low

Table 4

Jira Road Map of Sales Force NPSP Implementation

Projects / Sales Force NPSP Implementation

Roadmap

LY
+
Status category
Type

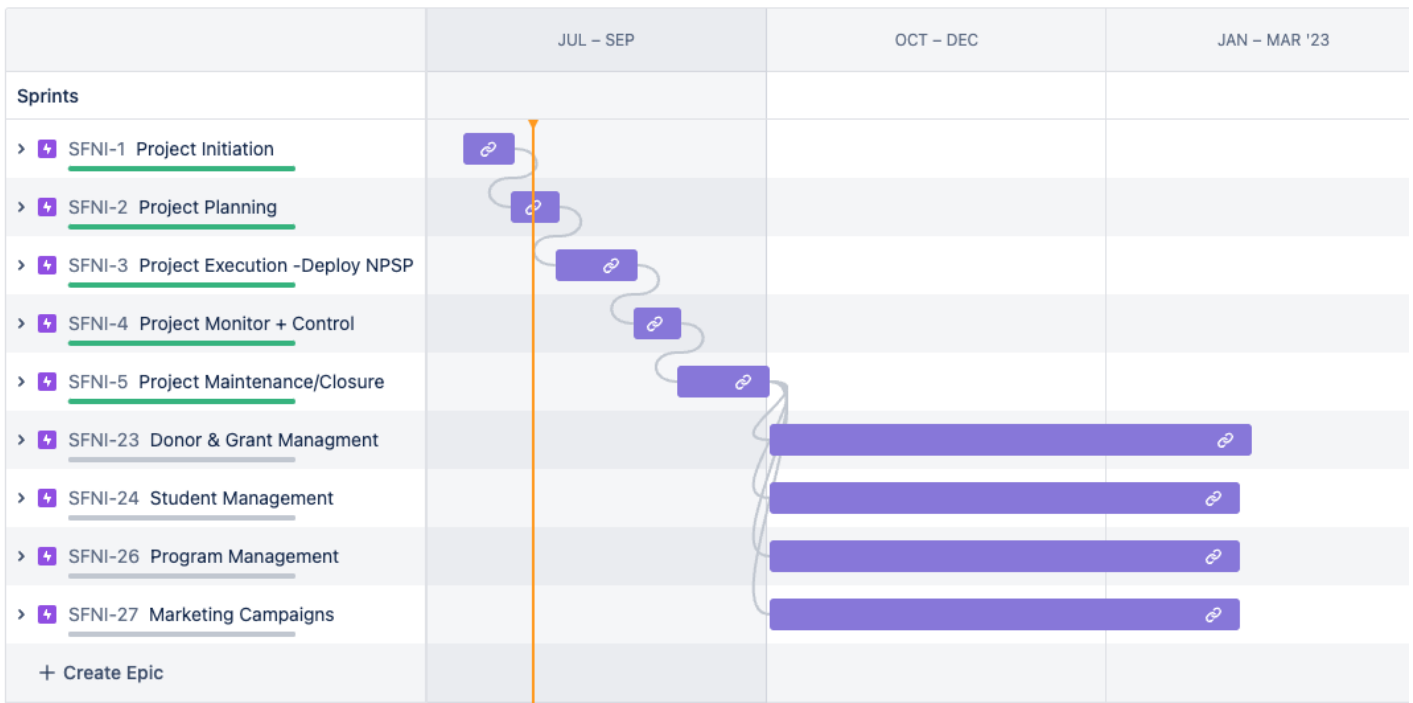


Table 5

Jira Road Map of Sales Force NPSP Implementation with Sprint Timeline

