

THE COMPUTERWORLD HONORS PROGRAM

CASE STUDY

LOCATION:
*San Francisco, California,
United States*

YEAR:
2006

STATUS:
Laureate

CATEGORY:
Business and Related Services

NOMINATING COMPANY:
Morgan Stanley

ORGANIZATION:

Salesforce.com

PROJECT NAME:

Salesforce Automation

Summary

From its inception, salesforce.com is committed to community involvement. One year after the company's founding, Salesforce Foundation was launched, in order to ensure philanthropy became an integral part of the company from the very beginning. It is the Foundation's goal to set an example for other young and growing companies – encouraging the belief that companies should start making a difference at their inception, rather than waiting until they are a multi-billion dollar organization before giving back.

Salesforce.com, now a recognized global company, has stood behind this commitment and continues to work to prove that companies of all sizes can and should be active community participants. The company offers a planned contribution to the community through what we have dubbed the 1/1/1 model:

- 1% of Time - 6 paid days per year, per employee, dedicated to volunteerism and community action – Over 10,000 hours were provided by approximately 1,000 employees last year demonstrating a phenomenal commitment to this.
- 1% of Product, the donation of salesforce.com licenses to qualified nonprofits. Over 800 non-profits currently use the system today with a value of over \$3 million donated through this program
- 1% of Equity – 1% of Founding equity was donated to the Foundation targeted at operations and global technology and youth development programs

Salesforce.com has pioneered a holistic and integrated approach to community involvement through what we call “compassionate capitalism.” The company strives to create value for the traditional shareholder as well as the national and international communities in which it operates.

All three of the components of the 1/1/1 model come together to create the Salesforce Foundation Nonprofit Capacity Building Initiative (NCBI). NCBI officially launched in 2002, by committing to give 10 donated licenses to all qualified 501c3 charitable organizations, or their international equivalent. The program has grown dramatically since its inception with now over 800 nonprofits using the software daily.



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Introductory Overview

The NCBI began by working with a few nonprofit customers and doing some very small targeted outreach to grantees to experiment with how the Salesforce.com CRM solution would fit their business. We found that salesforce.com's award-winning CRM solution can be easily customized by nonprofit organizations to support their data management needs particularly in the areas of donor, volunteer, program and contact management. Soon, we realized that the customizable solution could support virtually any data aggregating need that a nonprofit had.

As Salesforce.com CRM began to evolve and Salesforce Foundation developed deeper relationships in the nonprofit sector, we decided to formalize our philanthropic commitment by announcing a grants program to support non-profits technology needs. The Nonprofit Capacity Building Initiative reaches out to nonprofit organizations of all sizes and geographies around the globe from New York to Argentina to Tokyo. Furthermore, Salesforce Foundation developed new custom applications to specifically help the nonprofits run their organizations more effectively. We currently have the following modules in development:

-NonprofitForce (set up primarily as a donor and member management tool)

-Volunteerforce (to manage volunteer projects and track volunteer hours)

-FoundationForce (to help foundations manage grant requests)

-And many smaller pieces of critical functionality that can be applied to above templates via the AppExchange. Some of these are being built by the foundation and some by our partners. This includes batch entry of donations, integrated e-commerce functionality for donation, membership and event registration processing, a survey tool, mass email tools, and many more

By end of 2006, Salesforce Foundation will build out 7 more applications to be posted on the AppExchange, specifically suited for nonprofit organizations.

Salesforce Foundation NCBI also includes an extensive grant program aimed to empower nonprofit organizations with the resources to obtain tools that will help them achieve their social missions. The NCBI Grant Program, totaling \$500,000, consists of:

·Development Grant – A Development Grant, in the amount of \$25,000 USD, will be awarded each year to one nonprofit organization. Development Grants provide nonprofits with the financial resources to hire staff or consultants to help them expand their technology adoption and technology infrastructure to improve their productivity. Specifically the grant will enable them to provide tools specifically relevant to the nonprofit sector over all, such as event and case management systems.

·Regional Mission Support Grants - Three Regional Mission Support Grants, in the amount of \$5,000 to \$25,000 USD each, will be awarded each year to youth-development organizations in each of Salesforce Foundation's active regions; the Americas, EMEA and APAC/Japan. These regional grants will support organizations in their purchase and implementation of sustainable and effective technologies that will help them achieve their missions.

·Turn-It-Up Grants - Turn-It-Up Grants will be awarded to four to six global nonprofit organizations annually in the amount of \$10,000 USD each. These grants will provide nonprofits with financial resources to help expedite their implementation and adoption of new technologies.



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·Volunteer Support Grants – These grants are to support volunteers who work with non-profits to help with technology assistance projects as well as other areas they are passionate about. These range from \$100 - \$7,500 depending on the size of the group involved and the number of hours given.

Benefits

The first and foremost goal of the Nonprofit Capacity Building Initiative is to provide nonprofit organizations with the technology tools required to effectively execute their vision at a radically reduced cost. There are many advantages the initiative brings to nonprofits. The best way to demonstrate these advantages and opportunities is to share with you some examples.

Easter Seals, one of the very first nonprofit community members in the program - whose mission is to assist more than one million children and adults with disabilities and their families annually through a nationwide network of 90 affiliates and 13,000 staff members and thousands of volunteers - uses salesforce.com CRM to spearhead an effort to ensure all of its affiliates are online, maintaining their own web sites and website content to promote and manage local services. The national office uses salesforce.com's various applications to manage hundreds of contacts at these affiliates and report on their website development progress. By centrally housing this disseminated information, it enables the national office to help launch ten new affiliate websites every couple of months, with consistent identity and presentation as an umbrella to each affiliate's unique local style and brand. Headquarters is able to ensure that no call or inquiry from any of the 90 affiliates is lost or ignored, and stay on top of critical issues through standard and custom reports. With this centralized area of correspondence, reporting and case management functionality they can spend more time addressing the needs of their clients and less time managing internal communications and planning.

Habitat for Humanity (SF) organizational forums use Salesforce to concentrate on strategic planning, with a particular focus on public and private partners and contacts such as developers, city departments, and real estate agents to secure land that is below market. Salesforce.com's smooth and customizable development management system is key to finding available public or private land in a scarce housing market like the Bay Area. Volunteers can access information from anywhere and at anytime to more easily balance their commitment to HHSF with their professional and personal lives. "Salesforce.com has really gotten our site selection committee out of the circular, inefficient habits that we were in previously," said Bre Martinez, HHSF's Director of Finance and Project Development. "Now instead of always going back to the beginning of the process, we can move forward in a definitive straight line."

CIVICUS, with over 600 members in 107 countries and offices in Washington, D.C., London, and Johannesburg, is a membership-based organization relying on the salesforce.com application to track and profile various prospects, partners and other groups in order to target its programs more effectively. With over 3500 accounts and 1350 leads managed in the salesforce.com application, CIVICUS staff is now able to view account information and up-to-date reports on the fly, after a simple implementation that required little training. In addition, the staff can now quickly and intuitively generate reports by region, interest and other necessary criteria that enable them to build stronger relationships with current members. "We can access information from anywhere in the world," said Membership Coordinator Patricia Sipher, of CIVICUS, a world alliance for citizen participation. "For example, we could be at a conference with a laptop,



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run into a member and instantly access their information to find out when they joined, their membership type, and their interests.”

The Importance of Technology

Putting corporate tools in the hands of qualified nonprofits enhances their ability to focus less time on paper work and administration and more time on their social mission. The salesforce.com CRM application is the information technology we are contributing to the nonprofit community. This award-winning CRM application is beneficial to nonprofit organizations worldwide. It is currently being used by approximately 800 qualified nonprofit organizations to manage membership, contact and affiliate data, track and forecast fundraising campaigns, and report on volunteer opportunities.

Salesforce.com CRM enhances the ability of non-profit organizations to achieve their social mission through improved efficiencies.

Originality

Salesforce.com's 1/1/1 model is a unique and breakthrough idea. Marc Benioff, chairman and CEO of salesforce.com is internationally recognized as one of the preeminent thinkers in information technology and social responsibility. Based on the belief that on-demand applications can democratize customer relationship management (CRM) by delivering immediate benefits to companies at reduced risks and costs, Benioff founded salesforce.com in 1999 and led the company through milestones of continued success, from its public offering in 2004, to becoming the leader in the on-demand CRM space.

Since July 2000, the Foundation has opened more than 60 Community Technology Centers across the globe serving nearly 100,000 youth and other community members; has provided nearly 20,000 hours of service to the community through salesforce.com's employee volunteers; and supports salesforce.com in its efforts to offer its award-winning on-demand customer relationship management application to more than 800 qualified nonprofits globally, saving the sector millions of dollars every year. It is the recipient of the national 2003 Points of Awards award for Excellence in Corporate Community Service and the national 2003 U.S. Chamber of Commerce first annual Corporate Stewardship Award. More information is available at www.salesforcefoundation.org.

Success

Through NCBI, we have given more than \$7 million in products and services to date. In 2005 alone, we have given over 1,000 hours of volunteerism specifically dedicated to working one on one with nonprofits to immediately deploy and customize the donated salesforce.com CRM solution. By using our donated CRM solution, the projected savings to the nonprofit sector is more than \$8 million dollars, including those incurred by our partners who have stepped up to help make nonprofits successful. We are excited about continuing to expand and grow this program to further help impact the sector in an ongoing way.

To date, Salesforce Foundation has served more than 100,000 community members; has provided more than 25,000 hours of community service through salesforce.com's employee



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volunteers; has opened more than 60 Community Technology Centers across 12 countries; and supports salesforce.com in its efforts to donate its on-demand CRM application to more than 800 qualified nonprofits globally.

Here are 4 quotes from nonprofit organizations expressing the value of NCBI and salesforce.com CRM:

“Every single member of Cross Cultural Solutions depends on the Salesforce application. All inquiries, whether from clients, volunteers, or donors, come into Salesforce, and each country officer depends on the real-time, centralized information to make important decisions about programs and resources. The advanced reporting functions allow our executives to closely track enrollment, volunteer deployment, and program capacity. The information enables us to determine when we need to establish a new homebase or where our asset distribution priorities should be. With over 200,000 volunteers now and 1,000 new volunteer leads per week, there is no doubt that Salesforce is a critical part of our organization’s growth and success. Cross Cultural Solutions initially implemented salesforce.com in 2003 to maintain contacts and track potential donors and volunteers. Recognizing Salesforce’s ability to allow the organization to work more effectively, Cross Cultural Solutions now uses Salesforce to help plan and execute all alumni communications and recruitment campaigns. Salesforce.com has empowered us to achieve the mission of Cross Cultural Solutions to encourage and facilitate the sharing and understanding of different cultures and through that, to achieve meaningful global change. The value of Salesforce to our organization is incalculable.”

Steve Rosenthal, Founder and Executive Director, Cross Cultural Solutions

“The custom portal has helped me stay connected to Little Kids Rock. I now feel like I’m part of a bigger family. It is incredible to be able to get the latest resources from Little Kids Rock in real-time, assess my students’ progress and order instruments. And best of all, I now get my instruments delivered more quickly and can get my classes started sooner than ever before! The impact of the implementation was felt immediately by teachers and students alike.”

Jon Cohen, a teacher at an Oakland, California elementary school

“Armed with Salesforce, Little Kids Rock is poised for rapid growth with plans to serve new geographies and students. The custom portal offered an ideal solution that provided an easy way to integrate with Salesforce.com and a flexible platform to support future growth. Using Salesforce as a management tool has changed us in a way we couldn’t have imagined at the start. The power of it keeps unfolding.”

Laura Subotky, Chief Operations Officer, Little Kids Rock

“Salesforce.com’s ease of use and tight integration with Microsoft Outlook has made it easy to adopt and integrate on-demand CRM into the daily operations at our national office. With salesforce.com, we have improved the quality of support to our national corporate leadership companies, local United Way of America members, and other United Way of America constituents and customers, while increasing the productivity of our fundraising and development teams.”

Michael Schreiber, executive vice president, enterprise services, United Way of America.



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Difficulty

Often the most innovative projects encounter the greatest resistance when they are originally proposed. If the organization had to fight for approval or funding, please provide a summary of the objects faced and how they were overcome.

Trust. Our product donation program is part of our foundation, part of our philanthropy, part of our Corporate Social Responsibility. Our goal is for visionary nonprofit organizations to experience greater success through the use of salesforce.com. By donating licenses to these organizations we can contribute in a very relevant way to a greater social good. We can enhance the social good mission of the organizations that we donate to and help them to greater success achieve success. The obstacle is convincing the nonprofit community that our goals are aligned with theirs. We are most interested in creating a product donation program that makes the world a better place. The bottom line of our product donation program is to do good while the company does well. So, we are not a “vendor” in the traditional sense as it relates to the non-profit sector. We are a funder. We are philanthropists. What is in it for us is a better world. Really. Trust.