

WHITE PAPER

Direct Mail for Nonprofits

How to manage and measure direct mail communications with Salesforce

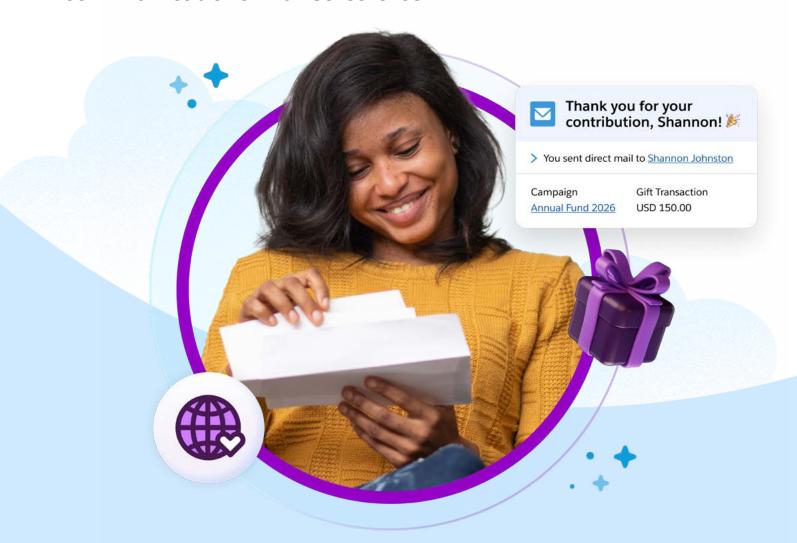


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Introduction

Direct mail has long served as a cornerstone of nonprofit fundraising. Yet, for many organizations, it has often felt like a standalone tactic–lacking the seamless integration with digital outreach that today's supporters expect.

Enter Salesforce Data Cloud-nonprofits can now unify direct mail response data with digital engagement, creating a more connected and holistic view of their constituents.

For the first time, nonprofits can seamlessly integrate direct mail data with email, social, and other engagement channels into a single, unified platform using Salesforce Data Cloud. This breakthrough provides a comprehensive, real-time view of every donor, enabling organizations to create actionable donor profiles that drive smarter, more effective campaigns and deliver deeper insights into donor behavior and preferences. By harmonizing direct mail with digital and offline data, nonprofits can personalize outreach, automate key processes, and optimize fundraising strategies with unprecedented accuracy and efficiency—transforming how they understand and engage their supporters.

With Data Cloud, Direct mail is no longer a standalone tactic; it becomes an integrated part of a connected donor journey, driving engagement and maximizing fundraising results. This means fundraising teams can instantly segment donors based on interests and behaviors, personalize every piece of mail, and track responses across all touchpoints. The result: smarter campaigns, stronger donor connections, and a 360-degree view of fundraising performance.

Nonprofits have long recognized the power of multi-channel marketing to reach and engage supporters, yet many organizations have struggled to fully understand how their traditional direct mail audiences intersect with digital channels. Historically, data silos and fragmented systems made it difficult to connect the dots between a donor's response to a mailed appeal and their engagement online or through social media. This lack of visibility limited nonprofits' ability to craft cohesive, personalized journeys, often resulting in missed opportunities for deeper relationship-building and donor retention.

By eliminating manual processes and enabling data-driven insights, Salesforce-powered direct marketing strategies help organizations deliver timely, relevant messages that resonate with each donor. Explore how this new approach can help your organization modernize direct mail marketing, unlock deeper donor understanding, and achieve greater impact in today's evolving philanthropic landscape.

How Can Salesforce Help You Modernize Your Direct Mail Marketing? What Has Changed?

Salesforce is offering nonprofits an easier, smarter way to run direct mail marketing by bringing all donor information together in one place and using new tools to personalize and track every campaign.

Ongoing innovation has delivered functionality that better equips nonprofits to execute direct mail campaigns. In June of 2025, Waterfall segmentation was made available in Salesforce Data Cloud. This new way to organize and target your customers applies a series of filters or rules in a specific order, so that each person ends up in only one group (segment), based on priority. Read more about Waterfall segmentation.

With Salesforce Data Cloud, for the first time, Nonprofits can bring together all your donor data from different sources–CRM, marketing, web, social, and more–into one up-to-date profile for each supporter.

How Does Data Cloud Improve Direct Mail Marketing?

With Data Cloud, nonprofits can instantly segment donors based on their interests, history, and behaviors, so direct mail is always targeted and timely.

Personalize every piece of mail using the latest data, making communications more meaningful and increasing engagement.

Track and analyze every donor interaction across all channels (mail, email, events, etc.) for a complete, 360-degree view of each donor.

Use AI-powered insights to predict trends, improve targeting, and make better decisions for future campaign

This means direct mail is no longer just a one-time letter—it becomes part of a bigger, connected journey with each donor, leading to stronger relationships and better fundraising results.

What Value Does This Innovation Provide?

By connecting direct mail with real-time data and unified profiles, this innovation enables smarter targeting, deeper personalization, and measurable impact.

- Real-Time Enrichment: As data is ingested, Salesforce Data Cloud immediately enriches donor profiles with direct mail interactions and related activity.
- Calculated Insights: Use Calculated Insights in Data Cloud to define donor behavior patterns (e.g., high-value givers, recent lapses, multi-channel responders), triggering intelligent segmentation and proactive engagement strategies.
- Personalized Engagement: Activate unified profiles in Marketing Cloud and Nonprofit Cloud, enabling hyper-personalized journeys across email, mobile, social, and direct mail.
- Smarter Segmentation: Leverage Waterfall Segmentation to ensure every constituent is placed in the most relevant and highest-priority group, improving message relevance and campaign ROI.
- Full Visibility & Attribution: Track direct mail responses alongside digital activity, giving your team full insight into donor journeys and campaign impact.



The Direct Mail Landscape in 2025

The Opportunity: Direct Mail Outperforms Email and Social in Attention, Trust, and ROI among marketing channels.

Nonprofits today are navigating a rapidly shifting landscape, marked by economic uncertainty, rising costs, and evolving donor expectations. Yet, amidst these changes, organizations are finding new ways to drive impact by embracing proven, high-performing channels—direct mail among them.

Direct mail stands out as a trusted, high-ROI channel in an environment where digital fatigue is real and inboxes are overflowing. While the average consumer receives over 100 emails per day–most of which go unread–physical mail breaks through the noise. According to recent USPS research, direct mail achieves a remarkable 91% open rate, compared to just 20–30% for email. This level of attention translates directly into action, with direct mail delivering an average response rate of 4.4%, far surpassing the 0.12% seen with email. These results position direct mail as one of the most reliable drivers of engagement and conversions across all advertising channels, consistently outperforming digital alternatives.

This data-driven approach is resonating with nonprofit leaders and marketers alike, who are under increasing pressure to demonstrate the value of every dollar spent. The Association of National Advertisers reports that 82% of marketers have maintained or increased their direct mail budgets this year, reflecting a strategic shift toward channels that deliver measurable results. The direct mail advertising market is projected to reach \$69.37 billion in 2025, underscoring its growing relevance and resilience in a digital-first world.

As highlighted in the most recent Salesforce Nonprofit Trends Report, organizations are charting their course with optimism–embracing change, overcoming challenges, and harnessing opportunities to deepen relationships with supporters. Direct mail, with its tangible presence and proven performance, is a key part of this strategy. Nonprofits are leveraging integrated technology solutions to personalize outreach, automate campaign management, and track real-time impact, ensuring that every touchpoint is meaningful and mission-aligned

In a climate where trust, attention, and ROI matter more than ever, direct mail remains a vital tool for nonprofits seeking to engage their communities and drive sustainable growth–backed by data, and powered by innovation.

Sources:

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Demographic Overview

Gen Z (born ~1997-2012):

- Direct mail resonates strongly with Gen Z, who see it as unique compared to their digital-heavy environment.
 85% of Gen Z respond to direct mail, and 67% take action (such as making a purchase or signing up for a service.)
- Response rate among ages 18–21 is 12.4% for direct mail, compared to just 0.12% for digital ads. Nearly 40% have made a purchase after receiving direct mail from a brand.

Millennials (born ~1981-1996):

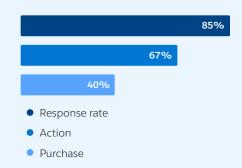
- 54% of millennials and 61% of millennial parents find mail ads more personal than digital ads.
- 87% of 25–39-year-olds feel positively about marketing mail, the highest among all age groups.
- Millennials are most likely to visit a brand's website after receiving direct mail (47%).
- 85% of Gen Z and Millennials combined respond to direct mail, and 67% take action

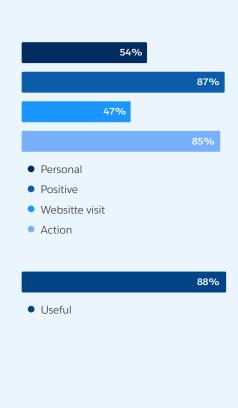
Generation X (born ~1965–1980):

- 88% of 35–49-year-olds find direct mail extremely/ very/somewhat useful.
- Direct mail is still useful for Gen X, but their engagement is not as high as with younger generations.

Boomers (born ~1946-1964):

- Most consistent and responsive to direct mail; they trust it, read it thoroughly, and often keep valuable pieces for later use (coupons, catalogs)
- Mail is a retention and loyalty driver: 81% say they're more likely to re-engage with a brand after receiving direct mail.





Sources:

Re-engage

- 1. RocketPrint: Direct Mail Statistics 2025
- 2. PostcardMania: Gen Z Loves Direct Mail Marketing
- 3. LettrLabs: Direct Mail Stats 2025
- 4. PRNewswire/Lob: State of Direct Mail Report 2025
- 5. DMA UK: Correlation Between Age and Direct Mail Interaction

81%

What Does a Standard Direct Mail Workflow Look Like?

House Mailing

This is mailing to constituents you already know. These could be past donors, event participants, members, or even volunteers, not any purchased lists.

Standard Workflow for House Mailing

1. Plan Marketing Effort Dates

This process is usually done at the beginning of the year. It is when you plan out the actual dates, counts, and budget for each of your marketing efforts.

3. Build Segments

Pull the data for the segments you've identified. This could mean querying a database, running a report or using a more sophisticated segmentation tool. (like Data Cloud)

5. Flag Records as Sent

Flag constituent records in your CRM to mark that they received a mailing. In Salesforce, this equates to having a campaign related list on the contact or Person Account record where that constituent is in one of the segments.

7. Send Mail

Send it out! It is common that the mail is presorted by destination to ensure postal discounts (and for the sanity of the postal workers).

8. Cage Gifts*

The mail you receive in return is opened and the gifts are entered into your database. This could be done by in-house staff or by a third-party caging vendor. Vendors will often provide a CSV import file so that the gifts can be imported into your database.

2. Determine Segments

Which groups of individuals will receive your mail? For example, everyone in South Carolina, Georgia, and Florida who has donated more than \$25 in the past 6 months. Total segments per mailing can range from one to hundreds.

4. Export Names and Addresses

Who will receive your mailing? Exports are usually in a CSV or text format. This file often includes separate columns for constituent ID, finder number, and source code.

6. Dedupe and NCOA

Deduplication can be done outside of your database by a mail shop (the person who sends the mail) or another third-party vendor. This process ensures that you do not accidentally mail someone twice. You can also do this in-house by leveraging Salesforce Data Cloud unification to provide a single, comprehensive view of your constituents. NCOA stands for 'National Change of Address.' NCOA validates the addresses you mailed to make sure the constituent has not moved. This is handled by a third-party and must be run on a regular basis to ensure you get nonprofit mailing rates.

*In the final step, Cage Gifts, it is very important that you flag incoming donations to identify which marketing effort those gifts resulted from. This will allow you to report on the performance of your marketing tactics. In Salesforce, this can be done by flagging the Gift Transaction to the correct Outreach Source Code and Campaign when it is caged.

Acquisition Mailing

Not all nonprofits use direct mail for acquisition. Consider your organization's needs first. Acquisition differs from house mailing in that it includes rented or purchased names. These are lists of names that your organization has bought from a list vendor or from another nonprofit. Acquisition mailings can also include deep lapsed names.

Standard Workflow for Acquisition Mailing

1. Determine Mailing Counts

Define the number of names you are going to purchase and where you're purchasing them from.

3. Run Dedupe

Don't buy names that you already own. This can be done by the list vendor, a third party dedupe vendor, or your staff. You can also do this in-house by leveraging Salesforce Data Cloud unification to provide a single, comprehensive view of your constituents.

5. Vendor Provides Finder File

A "finder file" is a list of names, addresses, source codes, and IDs of the individuals you have purchased or rented. This file is created by the acquisition vendor, who then provides it to the caging vendor or directly to the nonprofit as a CSV file. This helps in gift processing.

2. Purchase List

Once you know how many names you need, you actually go out and get those names. These names can be rented or purchased.

4. Insert Deep Lapsed

After deduping purchased lists, you may want to add in deep lapsed past donors to your acquisition mailing. Remember to flag these constituent records in your CRM as part of the mailing to save yourself from a reporting headache.

6. Send Out Mailing

7. Cage Gifts

The caging process for acquisition should in theory be the same as the house process. The beauty of having the finder file is that when you're caging, you simply key in the finder number and use it to populate the name, address, and marketing info in your database.

Source Codes

Key Points

- 1. A source code is a collection of numbers and letters that represent a mailing. In Salesforce, these are called Outreach Source Codes and they are related to the Campaign.
- 2. Always record the source code on the record of the outgoing mailing (Campaign) and incoming donation (Gift Transaction).
- 3. Use Outreach Source Codes to report on performance at the source code level as well as the Campaign level.

Source Code Parts

Each of the characters represents something very specific to a marketer. These characters make up what we call source code parts, such as each of the colors in the example below:

A source code is usually a combination of numbers of letters, like this:

Source	Code:	A0126	A01A00	1C
--------	-------	-------	--------	----

Source Code Part	Code	Description
Program	R	Renewal
	Α	Acquisition
Month	01	January
	02	February
	03	March
Year	26	2026
Segment	A01	1 Gift, 0-6 Months, \$10-\$14.99
	A02	1 Gift, 0-6 Months, \$35-\$24.99
	A03	1 Gift, 0-6 Months, \$25-\$49.99
Package	A001	16-10-Fall Package Red
	A002	16-10-Fall Blue Package
Test	Т	Test
	С	Control

In the first part, denoting "Program," the letter R means "Renewals" and A means "Acquisition." In the "Month" part, 01 stands for "January" and 02 stands for "February."

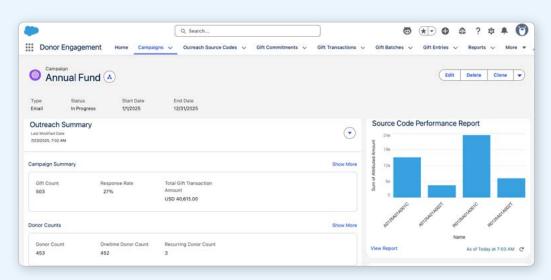
Best Practice

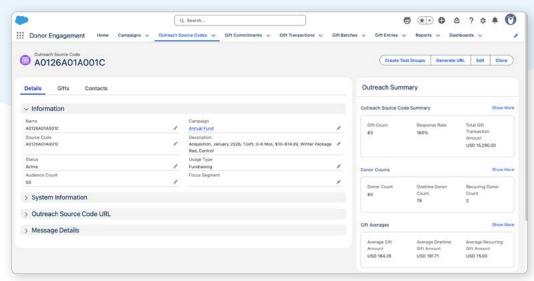
Source code structures can vary. There is not a standard set of source code parts that every nonprofit uses. Generally, it helps to identify the date of the mailing, the segment, test/control flags, package treatment, and often program/department fields. Use a number if you'll want to query that part based on ranges ("Month is greater than 06"); use letters if you have more than nine items you want to represent. A letter will allow you to use up to 26 variables in a field, where a number only allows nine. However, there can be hundreds of different items tracked through the source code–it all depends on your business and reporting needs. As a best practice, keep your source code length between 8-15 digits.

Source Codes and Campaigns

Make sure your source codes are associated with the record of your outgoing mailing, as well as the records of your incoming donation. In Salesforce, you can create any number of Outreach Source Codes attached to a Campaign. When the gifts come in response to the campaign, ensure you are also tracking the source code on the Gift Transaction record. (Entering the Outreach Source Code on a Gift Transaction will automatically associate the gift to the correct Campaign in Nonprofit Cloud. You may consider adding fields to break out each of the source code parts into separate individual fields. This allows for more flexible donor management and reporting. These different fields can then be combined into one master "source code" formula field that is automatically generated. The Gift Transaction object usually only has one field for the combined source code.

In the following screenshots, you can see an example of a Campaign in Salesforce with an aggregated Outreach Summary for all Outreach Source Codes on the campaign. The second shows an individual Outreach Source code that represents an individual segment. There is also a summary of results on the Outreach Source Code.

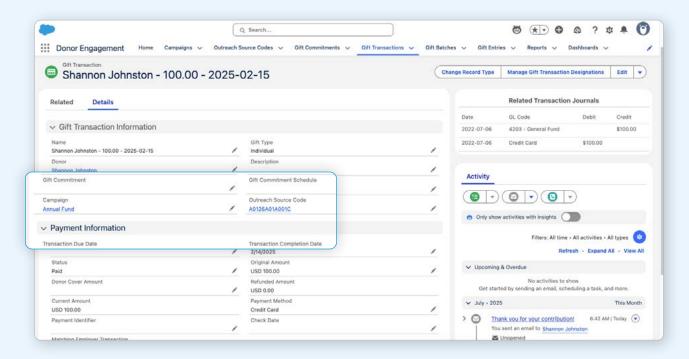




Source Codes on Donations/Opportunities

You track the Outreach Source Code on the Gift Transaction object for incoming gifts. The data in this field will come in from your gift caging process, which helps with reporting.

Here's an example:



Best Practice

The Outreach Source Code should contain those parts that are unique to that specific segment (e.g. segment code, package, test). Use the same alphanumeric codes for your source codes across all mailings, so you can use specific segments again for multiple mailings. So for our example the segment of A01 will always equal 1 Gift, 0-6 Months, \$10-\$14.99 regardless of mailing.

Reporting

Do this work so you can get meaningful reports to know what works! You have all of the reportable fields that come out of the box on the Campaign and Outreach Source Code records as well as the Outreach Summary roll-up fields to show you things like total gifts, average gift, response rate, etc. If you wanted to know how your A01 prospects are performing (donating) for a specific mailing, you can look at the Outreach Summary for the corresponding Outreach Source Code. Or if you wanted to know ALL of the A01 donors across all acquisition marketing efforts in 2026, you can create a report where the Outreach Source Code is equal to "A**26"A01*'.

Advanced Reporting

Many nonprofits use advanced source code reporting to track a donor's movement through their fundraising pipeline. For example, you can report on average gift amount growth from when donors moved from an A01 segment grouping to a segment grouping further up the hierarchy. This is possible since you have the Outreach Source Codes recorded on their Gift Transaction Records and can compare their responses over time. Why do reporting? So you can create ask ladders and package treatment for specific segments. One segment could get a higher-end package with high-dollar asks, while another could just get a postcard with a call to donate online.

Packages And Creatives

Creative and package reporting is often done by advanced direct mail organizations and may not be necessary for every nonprofit. These can be managed by third-party agencies. But if you'd like to track the data on your packages and creatives in your own database, Salesforce can handle that.

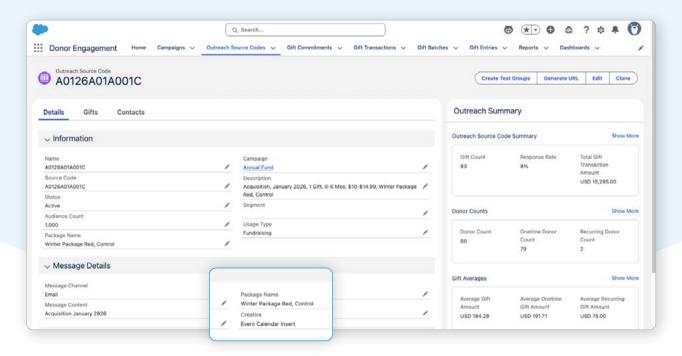
Things To Remember

- Packages and creatives are managed in Salesforce using both existing fields on the Outreach Source Code as well as any custom fields you'd like to add that are applicable to your business.
- 2. Package codes are often used in the source code.
- 3. Tracking individual creatives can give you useful data, but may not be necessary.
- 4. Mailing costs can be managed at the creative or the package level using simple custom fields and formulas.

Packages

The package is what drives the performance of your marketing efforts. If your marketing agency has developed an award-winning package that drives donations with a double-digit response rate (average industry response rates are in the single digits), you'll want to figure out how to repeat that success. But you can only do that if you're able to measure each package's individual performance.

Luckily, if you're using Salesforce records to track packages, you can run a report in just a few seconds and see all of the donations driven by each of your packages. The first step to being able to report in Salesforce is ensuring you have fields to track them on the Outreach Source Code. Having the package at the Outreach Source Code level allows you to have multiple packages within a specific mailing. It also allows you to have multiple test and control packages within that same mailing:



You can use the package fields on the Outreach Source Code to track a specific code for the package. This code could have a specific pattern or it could be randomly generated. As a best practice, make this code unique to that package. For example, A001 will always equal your 2026 Spring Mailing. You will also note that this package code is usually present in your source code.

Creatives

You can break out the different pieces of each package to see how they performed. Creatives represent the individual pieces within the envelope of the mailing (and often the envelope itself, too). You can manage creatives in Salesforce by using custom fields on the Outreach Source Code. This is the best approach for more simple use cases. You would then have one Outreach Source Code per segment/package/creative, tracking all of that within one source code.

For more sophisticated programs, you may consider creating a custom object for creatives and packages. Your creatives object is a child of your package object which is a child of your Outreach Source Code. This will be a many to many relationship that is created using two master detail relationships and a joining object. Do it this way because one package can have many creatives and one creative can belong to many packages.

Creatives can be related to more than one package. This is important to note for reporting. Having this structure allows you to report on a given creative's performance across all of the packages that it has been included in. For example, you can see how well people are responding to the Spring Welcome Letter regardless of which package it was in.

Since packages are related to source codes, you can see how a specific set of individuals respond to the address labels versus the calendar insert. Data can quickly become very powerful for reporting!

The chart below breaks down two different packages. You can see that the content of the packages are almost exactly the same. What makes the packages unique is the creative that represents either a calendar or address labels.

PACKAGE NAMES	CREATIVES
Package A001	Spring Welcome Letter Standard BRE Bookmark Address Labels Insert
Package A002	Spring Welcome Letter Standard BRE Bookmark Calendar Insert

Cost Management

Many organizations want to know how much their packages will cost. If you keep cost information on the creative record, you can calculate costs. For Package A001 above:

Spring welcome letter = \$0.05/piece Standard BRE = \$0.05/piece Bookmark = \$0.10/piece Address Label Insert = \$0.05/piece Package A001 Total Cost = \$0.25/piece

If you have a segment of 1,000 people who are receiving Package A001 in your mailing. The total cost for that segment would be $$250 ($0.25 \times 1,000 = $250)$. This amount could also be rolled up across all segments to get a grand total as well. You could also just put a simple cost field on the package record if you did not want to manage this at the creative level. It depends on your needs.



Campaigns

Key Points

- 1. Campaigns represent any outgoing communication to a constituent, including direct mail.
- 2. You assign source codes to campaigns to track channels, segments, packages, creatives
- 3. Roll-up fields on both the source code and campaign give you the ability to report on the performance of your efforts.

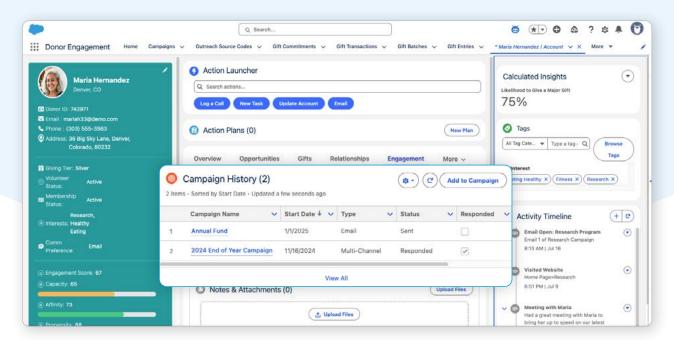
Campaigns 101

In Salesforce, a campaign is an object that represents any outgoing communication to a group of constituents. This could be anything from an event invite to a multi-channel marketing or direct response campaign. It does not include one-to-one communications such as major giving interactions—those are recorded as activities or tasks.

In order to track all of the people who received these communications, you have two primary options in Salesforce: Campaign Members or Data Cloud Segments.

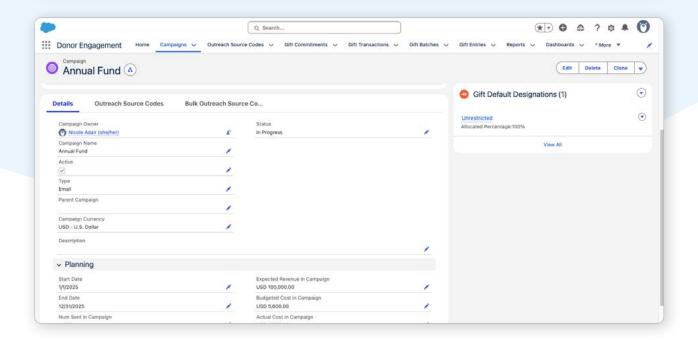
Campaign Members

Campaign members are all of the people who received communications from a given campaign. So for a direct mail campaign, you'll find a list of all the recipients of that mailing under "campaign members." Likewise, if you're looking at a constituent record, you'll see all of the campaigns that they've received messages from in their "campaign history" list.



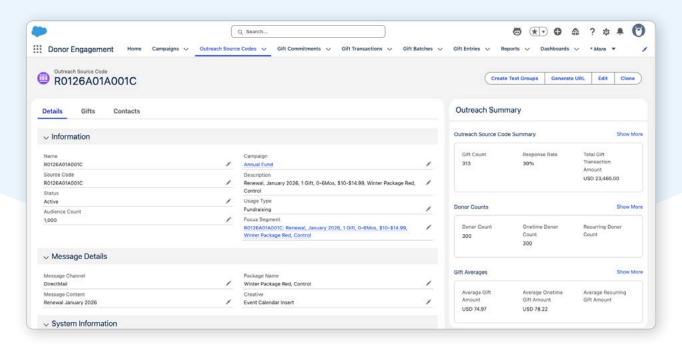
Important

The columns in this screenshot represent just three of the fields on the campaign record. This related list can be configured to have more, fewer, or even different fields exposed. Salesforce administrators have the ability to configure campaigns with custom fields just as you would with any other object in Salesforce. Below is a sample of a campaign that represents an Annual Campaign.. The administrator has configured the fields to identify the campaign type, status, and start and end dates. You can run reports on all of these fields.



Data Cloud Segments

For those of you using Salesforce's Data Cloud, you can bypass the Campaign Member object and simply include the link to the Data Cloud segment on the Outreach Source Code record. One advantage of this approach is that it limits your storage needs because you are not storing Campaign Member records in the CRM. The other advantages come in the power of segmentation in Data Cloud (see more that in the Segmentation section). One additional consideration here is how you are surfacing the campaign information in Nonprofit Cloud on the constituent record. Work with your partner or administrator to determine the information you want to pull from Data Cloud to expose on the constituent record based on your business needs.



Campaigns Hierarchy

Salesforce allows you to build a hierarchy relating your campaigns to one another for better reporting. All data from the campaign hierarchy automatically rolls up to the top tier of the hierarchy, also known as the "parent campaign." This includes things like total number sent, total number of responses, and even total gift amount. The Outreach Source Code object may limit the need for hierarchies within a campaign, but you may choose to have a campaign hierarchy to summarize information at the highest levels within your business.

Campaign Designation

The "default designation" on the Campaign object in Salesforce primarily refers to how Gift Designations are handled within Salesforce Nonprofit Cloud. It's a key concept for organizations that manage donations and want to track how funds are allocated.

What are Gift Designations?

- Gift Designations allow you to specify how a donation (or a portion of it) is intended to be used. For example, "Annual Fund," "Scholarship Program," "Building Renovation," "Emergency Relief," etc.
- They provide granular tracking of restricted and unrestricted funds.

The Role of Campaigns in Designations:

- You can and should associate Gift Default Designations directly with a Campaign. This means
 that any gifts or opportunities linked to that campaign will automatically inherit those default
 designations. You can define one or more Gift Designations to be associated with the gift by
 default.
- When a new Gift Commitment or Gift Transaction is linked to that specific Campaign, the system will automatically pre-populate the gift's designation fields with the default designations defined on the Campaign.
- Percentage Allocation: You can also specify a percentage for each default designation, allowing you to automatically split a gift amount across multiple designations. For example, 70% to "General Operating Fund" and 30% to "New Program Initiative."

In essence, the "default designation" on a Salesforce Campaign serves as a pre-defined instruction for how donations related to that campaign should be allocated, streamlining the gift processing and financial tracking process.

Segmentation

Many nonprofits get confused by how to best segment their direct mail lists to drive donations. There's really no right way to do it. It depends on your needs and how hands-on your team wants to be.

The 4 Approaches For Segmentation In Salesforce Are:

- Use native Salesforce reports to populate campaign members into segments
- 2. Use Salesforce Data Cloud for more sophisticated segmentation
- 3. Use a third-party segmentation tool to create segments and then import the data back into Salesforce
- 4. Use a third-party vendor to define and create your segments and then import the data back into Salesforce

You create segments in order to do performance reporting. Reports will tell you how specific groups of people perform over a period of time. A sample segment could be 2 gifts, 0-6 Months, \$100-\$149.99. This represents two gifts in the last 0-6 months that sum up to an amount between \$100 and \$149.99.

Reports

The Salesforce platform offers reporting tools that allow you to build reports to filter for a specific group of donors or prospects (a segment). If you have relatively few segments (20 or fewer) you may find it easiest to use this method.

A sample workflow for this process is:

- 1. Create campaign to represent the mailing
- 2. Create all the outreach source codes for that campaign
- 3. Create report to identify who belongs to each segment (1 report/segment/outreach source code)
- 4. Use the reports to add campaigns members to their corresponding outreach source codes

This process works well for organizations that do not have a lot of segments in their mailing. It takes advantage of standard Salesforce functionality and does not require any integrations to third party vendors or tools. This is a great workflow if your nonprofit is just getting started in direct mail or those with very standard RFM (recency, frequency and monetary) segmentation. RFM segmentation looks at when the last gift was made, total number of donations, and gift amounts. Nonprofit Cloud comes with RFM fields on the constituent record. Where you may encounter issues is when you start to have a lot of complex or varying segments per campaign. The burden of creating multiple reports to populate 50 or even 100 unique segments per mailing simply isn't sustainable for enterprise-level nonprofits. That is why you'd turn to the other options.

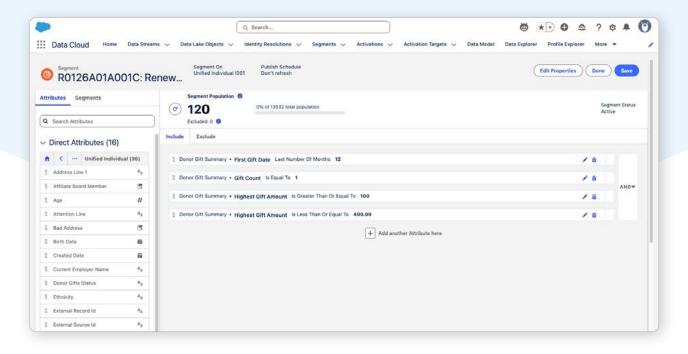


Data Cloud Segmentation

Data Cloud segmentation is a good option for those who have many segments and for those who want to do their own segmentation in-house rather than relying on a third party. Please visit our site to learn more about Data Cloud if you are not familiar with it.

Data Cloud allows you to bring in data from multiple sources. Of course, you will probably want donor and prospect data from your CRM, but maybe would like to pull constituent data from other systems like an event or volunteer management system. You can even ingest acquisition lists in Data Cloud. (See the Acquisition section for considerations around these lists.) Once you have all of the data, you can then harmonize it and create a unified profile for each person you want to include in your campaign.

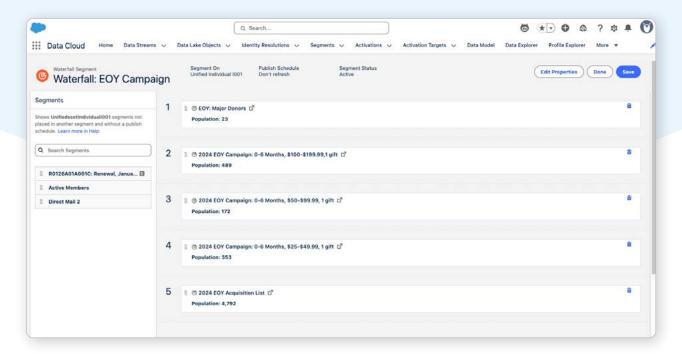
Then, using the segmentation tool in Data Cloud, you can use a drag and drop interface to create complex segments using logic across multiple objects. You can also add exclusions to your segments. Say you want to ensure your board members never receive a direct mail solicitation, you can add a "board member" exclusion to your direct mail segment, assuming you are tracking board members in a way that makes this possible. You can then output a .csv file for mailing, push to a marketing or advertising tool and more.



Additionally, Data Cloud's segmentation tool can perform Waterfall Segmentation. Waterfall segmentation involves creating and prioritizing segments in a sequential, cascading manner. Think of it like a funnel or a literal waterfall; you start with a broad audience and then apply increasingly specific filters or criteria to narrow down the groups.

Often, you may have donors that fall into different segments, but want to prioritize the segment they fall in. For example, you want to mail mid-level donors and volunteers, but you want the fact that someone is a mid-level donor to take priority over the fact that they are a volunteer. Those who qualify for a higher-priority segment are placed in that segment and excluded from any lower-priority segments they might also qualify for. This ensures mutual exclusivity among your final segments. And, if you place your acquisition list at the bottom of the waterfall, you can ensure all of your current donors on file are not included in your acquisition list/mailing. No more bouncing acquisition lists against your house file! Creating a waterfall segment also gives you the ability to group segments and export them into one file you can send to your mailhouse or other vendor.

See the example in the figure below:



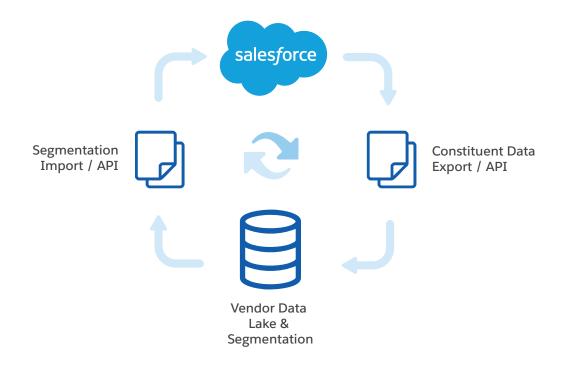
Third Party Segmentation Partners

Some nonprofits use a direct mail model where most of their mass segmentation is done by third party marketing partners. These partners traditionally specialize in high volume direct mail for the nonprofit space. Merkle, RKD and Moore are just a few of the dozens of partners you could work with. They offer many services often including marketing strategy, segmentation build, letter printing, and caging. Each one varies, so do your homework.

How do these partners know whom to place in each segment and which segments to use in a mailing? It depends on the data. These partners all use some variation of statistical modeling of your database to predict giving likelihood for each mailing. From those models they are able to tell which constituents you should be mailing (past donors, deep lapsed donors, event participants, etc). They take into account every piece of data you can provide. They also often append data such as census and credit information. Here's how data transfer usually works:

Note

Partners will need a copy of your data in order to create models. This could be as simple as a CSV file transfer of biographical info. It could be as complex as an API architecture encompassing multiple data sources. During your initial meetings with these partners they will consult with your organization to identify what data sources they need. From this consultation they will design their data lake which will be used on their end for modeling.



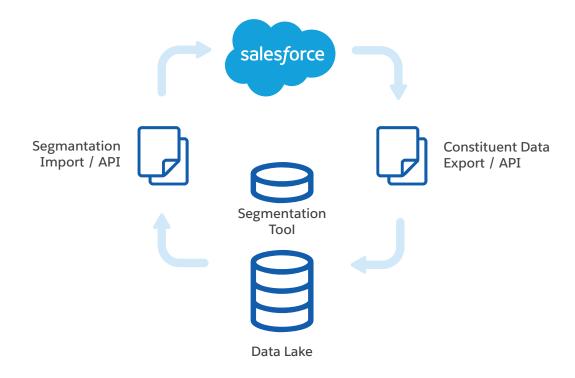
Once they complete the modeling, these vendors will usually provide a report showing the predicted counts for your mailings. This report is broken down by segment and often includes projected cost information. Then your marketing team can fine-tune the final segments that will receive the mailing. After segments are finalized, the mailings are physically sent. You are also provided an import file from the partner. That import file will be used to flag all constituents who received the mail.

Third Party Segmentation Tools

These are software solutions that allow for complex modeling and direct marketing campaign builds, such as RedPoint and SAS. These provide advanced statistical modeling capabilities as well as traditional marketing functions such as exclude and include processing. Use this option if:

- 1. You have a sizable marketing team
- 2. Your team has advanced technical skills, and/or
- 3. If you want to create and manage your own complex segments

The workflow is very similar to the one you might use with a third party. The main difference is that data processing would be in-house, rather than at a partner. Here, you also need to build your own data lake to house this data. Note that these data lakes can often be provided by the third party tool. A simplified architecture is:



Marketing Planning

Direct mail planning is the process of creating a blueprint for your upcoming marketing efforts through direct mail. For example, you could plan to have twelve acquisition mailings per year, sent the first day of each month. This process is often done by an organization's marketing team months before the mailing is sent. Typically, when you prepare for the next year's mailings, you complete this at the end of the fiscal year.

Nonprofit Marketing Planning Should Track 3 Main Things:

- 1. Dates, which can be tracked on the campaign object
- 2. Projected costs, which can be stored on the campaign object or a custom package object. This data will roll up into parent campaigns for reporting.
- 3. Projected income, which can be recorded on the campaign object.

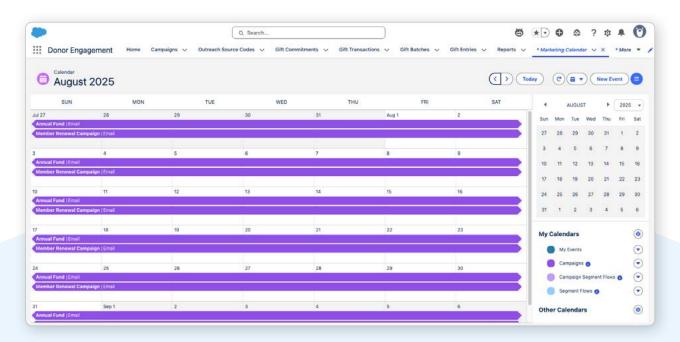
 When combined with projected costs and actual income, this gives you a complete view of marketing performance.

This may seem straightforward, but there are actually a lot of complexities buried in each. Here's how it works.

Dates

Traditionally, organizations track dates using manually created mail plans. An example is below. In the screenshots below, you can see the start and end date fields on a campaign.

While this type of reporting works, it is a bit dated and isn't connected to your live data. This is where you can use Salesforce to provide some quick wins for the marketing team. Where are dates recorded in Salesforce? Usually on the Campaign object where you can store the start date and end date of a campaign. This can be used to represent the drop date of the mailing (when it was "dropped" at the post office). That alone would provide you with enough information to build a standard calendar in Salesforce. You can also build a calendar in Salesforce based off of these dates, like this:



If you want to go further, you can also track due dates for creative, copy, segmentation, etc. You can record these additional dates as individual fields on the campaign object or as tasks related to the campaign.

Note

This type of calendar reporting is not required. Some nonprofits choose to manage all of their calendar dates outside of Salesforce or through a partner. But if you want all of your data to be in one place and easily reportable, keep it in Salesforce.

Projected Costs

Projected costs are the estimated expenses for sending out a mailing, like postage, printing, and marketing services. During the planning phase, it is common for marketing managers to set a budget for each mailing they will have, such as \$15,000 to spend on the Annual Holiday Appeal. This projected cost allows marketers to estimate how many pieces of mail they will be able to send out. Based on past marketing performance, you can then predict the amount of revenue the organization will receive. Using our holiday example above, let's say it costs \$0.50 total to send each piece of mail. This tells you that you will be sending out 30,000 pieces of mail (\$15,000/\$0.50=30,000) If you have a database of 100,000 potential prospects you will need to narrow that down to the folks who are most likely to donate. Looking at past segment performance, you can focus on the most valuable groups of people in your database (segments) and send mail to only those individuals. This ensures the highest rate of return possible for your marketing spend. Having projected costs really helps with that narrowing down process.

In Salesforce, you can track this in a few ways. The simplest way would be to populate the field called "Budgeted Cost in Campaign" directly on the parent campaign. This represents the overall cost for that entire mailing. That works well for simple projects or those where a third party vendor is managing all of the details. The more complex way of tracking this would be at the package level, using cost fields. The cost fields all roll up to the outreach source code and ultimately the campaign. The benefit of this approach is that it allows for real-time rollup calculations at a granular level. The downside is that you have to manually enter the costs for each package, or do a data import. Salesforce gives you the flexibility to track the costs in a way that works best for your organization. Like tracking dates, tracking costs isn't required-but it can be very helpful.

Projected Income

Similar to projected costs, this represents the expected amount of revenue that will come in from each marketing effort. Just like projected costs, there is a field on the campaign object called "Expected Revenue in Campaign." This field can be used for tracking the amount of revenue you are predicting for each campaign. This also rolls up to the parent campaigns for overall reporting. You can easily create a reporting matrix on these numbers to tell the marketing team what the projected costs will be in comparison to the projected income. Along with actual income, this gives your marketing team a great base for year-over-year reporting.

Acquisition

A Few Things to Consider As You Implement Your Acquisition Process:

- Carefully consider all costs before implementing an acquisition program. Include both list rental costs and staff time and technology configurations.
- Contracts vary by vendor. Be very clear on what you can do with the names you get from a vendor before entering any agreements.
- 3. Salesforce provides the flexibility to configure the system for acquisition processes both large and small.

What Is Acquisition and How Does It Work?

"Acquisition" is when you purchase or rent lists from a third-party list broker. These lists contain the names and addresses of individuals who could be potential donors, who are new to your organization. In other words, they do not exist in your database already. Nonprofits run acquisition programs in order to build and grow their database of donors.

So where do these lists come from? There are many places where nonprofits can purchase or rent lists. Traditionally, lists are purchased from third party vendors, of which there are dozens. These lists can also be purchased from other nonprofits with similar missions (although this is less common). The investment required to rent lists can range from a few thousand dollars a year to a few hundred thousand dollars a year.

Where do list vendors get all of those names and addresses from? Usually, they come from other nonprofits who share their donor information with list vendors. However, these lists can also come from for-profit organizations such as magazines or retail companies (for example: Outside Magazine, REI, Bass Pro Shops, etc). It is important to note that both nonprofit and for-profit organizations providing names to these list vendors are often compensated for their efforts. Compensation could be in the form of cash or simply access to names from other organizations.

How to Start With Acquisition for Nonprofit Fundraising

Example

Consider a medium-sized regional nonprofit whose mission focuses on southeastern wildlife conservation. This organization wants to expand their membership program by 2,500 individuals. How would they go about renting a list to start this process?

We first need to figure out how many names we need to rent. From our scenario we know that we want to add 2,500 names to our membership pool. Using an industry average response rate and doing some simple math, we can figure out how many names to purchase. To keep it simple, let's say that we predict that 5% of everyone we mail from the acquisition program will become a member. This tells us that we need to purchase 50,000 names to get our desired number (2,500/0.05=50,000). Note that a 5% return on acquisition would be a very good return rate, so this number is used for example purposes only. If you are just starting out, I would suggest using a small projection number.

Now that we have our estimates, we need to decide the people to mail to. This is where working with your acquisition vendor comes in. In our scenario, our nonprofit is based in the southeastern United States, so they probably only want to purchase names in their region (states like: Georgia, South Carolina, Alabama). We also probably want to only look at names from other organizations

with similar missions (for example: wildlife conservation, animal welfare). The idea is that if you donate to other wildlife conservation organizations then you are likely to donate to this one too. Third, you may want to look at lists from for-profits with similar brand identities—such as Bass Pro Shops and REI.

Now that our organization has identified how their names should be constructed, the list broker will provide the names. This is provided in what the industry calls a finder file. A finder file is simply a CSV or text file of names and addresses. This finder file will contain a unique ID representing the record. That number is called a finder number. This is the unique ID which tells us who the constituent is and what mailing they are associated with. The list vendor may de-duplicate lists to ensure that you are not purchasing names that you already own. Or you can ingest the lists into Data Cloud and prioritize the acquisition segments last in your waterfall segment to accomplish the same thing.

Using Salesforce as a Donor CRM: Some Considerations

Note

You have the option to rent or buy names. It is a common industry standard that you do not actually "own" the name until that constituent converts and becomes a donor. You "rent" them for a period of time until this conversion happens. This is an important distinction because it means that you cannot actually import the rented names into your database as contacts.

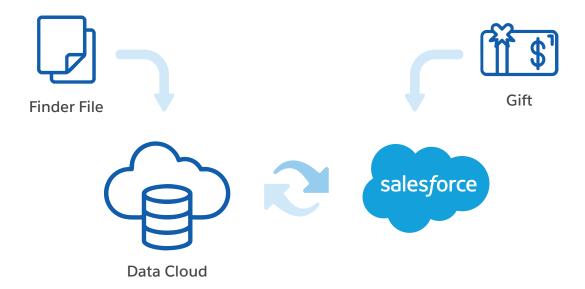
The limitations outlining exactly what you can and cannot do with your names will be clearly stated in your vendor contract. Some contracts allow you to store names in your CRM tool. For those types of contracts, you can use the lead object in Salesforce to store the names. Other contracts allow you to store the names in your CRM as long as you purge them at an agreed-upon time. For those you can use the lead object, but delete the names on a regular basis. Other contracts are more strict and do not allow you to store the names anywhere in your database. For those, you may consider Salesforce's Data Cloud or a data warehouse outside of Salesforce. Many contracts allow you to "store" the records as long as they are not part of your fundraising database. Be sure to work with your legal team and an implementation partner to determine the best approach for your organization.

If your contract allows you to use the lead object, then the process is straightforward in Salesforce. You import the names as leads. When a donation comes in, those leads would be converted to a contact. Include custom fields to identify things like the name of the list, segment codes, and/or source codes. You may also consider configuring your batch tools to convert the lead to a contact automatically based off of finder number.

If you choose not to import the list as leads for data storage reasons or you are not allowed to import the names into your database, you may consider Data Cloud. The workflow for this scenario looks like this:

Acquisition Process

In this architecture, the finder file is ingested into Data Cloud. Salesforce will be configured to reach out to that Data Cloud any time a gift comes in with an acquisition finder number. When it finds the correct constituent, then Salesforce will create a contact record based off of that finder number and apply the donation to that new contact. This process currently requires customizing the gift entry flow in Nonprofit Cloud.



9

Multi-Channel Marketing

Key Points

- Direct mail is important, but you need to have an integrated marketing strategy that incorporates multiple channels for the best donor experience
- Consolidate your organizational silos by collaborating across departments to plan your marketing. Avoid problems like duplicate mailings to people who have already donated at an event or online.
- 3. Create a great donor experience.

What Is Multi-Channel Marketing?

"Multi-Channel Marketing" is the practice of distributing your nonprofit's marketing message through a variety of media–direct mail, email, SMS, billboards, or even signs at your local bus stop. Your nonprofit's brand is made up of all of the ways people interact with your message. So you need to make sure people hear your message more than once, and in different places! Why? An integrated multi-channel marketing strategy is becoming more and more critical. Consider direct mail as an important piece of your larger marketing plan.

Why Should My Direct Marketing Team Care About Multi-Channel?

How many times have you received a print direct mail piece from a nonprofit asking you for a donation when you just made one online? Does that make you feel like a valued donor? No. Does it make you feel like the organization knows and cares about you? No. Does it make you feel like they are a good steward of your donation since they are wasting money on unnecessary direct mail? Nope. It is up to you as part of the marketing or fundraising team to ensure that your constituents do not feel this way. And you do that by breaking down the silos and implementing a true multichannel strategy that puts your constituent (not your internal processes and tools) at the center.

If your organization is like many nonprofits, you probably have lots of internal silos. These silos could be organizational or technical. By organizational I mean the actual org chart–think digital marketing team vs. offline marketing team. A technical silo, on the other hand, would be having one database for email marketing, a separate one for fundraising, and a third for your program management. Take down these silos wherever possible. This will result in a positive experience and in turn provide a higher return on your marketing spend.

Let's use Amazon.com as an example. When you make a purchase from Amazon, you expect them to know exactly who you are, to suggest what you may want to buy, and also to make the fulfillment process seamless by constantly updating you on delivery status. That is what your donors now expect. The most innovative companies focus on the customer experience across channels. You can, too.

So How Do I Start Building a Multi-Channel Strategy?

A multi-channel strategy helps create a consistent experience across all departments. This means no silos. This experience takes place with every interaction to your organization print, social, email, telemarketing, etc. After all, your donors see you as one organization, not separate departments.

Start with the org chart. Are there places where you can begin to work across departments to ensure a cohesive marketing strategy? It could be as simple as planning emails and social posts to be sent out at the same time as print mailings to reinforce messaging. Or it could be as bold as

changing the org chart to create a culture which places your constituent at the center of all of your marketing efforts-regardless of channel. Oftentimes this change needs to come from the top of an organization. For example, your Chief Marketing Officer may decide to consolidate the direct mail and digital marketing teams under one common umbrella to ensure a consistent message. The main takeaway here is to create a marketing culture that puts your constituent first-not one that is beholden to channel-based internal departments.

Consider technology: have one place to go for your marketing data. This could be structured data within a constituent relationship management system, or CRM (such as the Nonprofit Cloud, Salesforce's Data Cloud, a data warehouse, or unstructured data. Within one of these data repositories, collect as much data as possible. Gone are the days where you are just looking at last year's fundraising data for direct mail segmentation. Leading organizations are now using statistical models combined with artificial intelligence to layer in program participation, events, volunteering statistics, and other third-party data to their fundraising activity to generate segments. These segments are then used to put their constituents on multichannel marketing journeys. You will need all of your data available somewhere to do this type of work. Think through this very carefully when selecting software vendors. Your main goal here should be to eliminate data silos in any way possible. Select software vendors who can help break down silos and also provide access to industry-leading tools.

Once you have all of your data in one place, you can take advantage of tools to facilitate your marketing journeys. For example, Marketing Cloud will allow you to trigger emails, SMS messages and digital ads. That journey could be kicked off by responses to a print mailing. You could also use segmentation tools to create direct mail segments off of email responses, clicks, opens, etc. None of this would be possible if you have data silos.

Donor Experience-Not Just Attribution of Revenue

Revenue attribution means who gets credit for the donation. In the nonprofit world this is usually divided between online and offline, but it could also include other media like telemarketing. Attribution often drives budgets and headcounts, so it can be a point of contention. Sadly, nonprofit departments sometimes argue over who "owns" a donor and their donations. This can result in selfish business decisions and silos as departments work on their own priorities. Each of these groups are well-intended, but this often does not result in a truly seamless experience for the donor. It also does not offer the nuanced, detailed data that a consolidated impact platform would offer.

Consider the donor experience as the number-one priority at your organization. This may require examining your organizational structure, but it will pay off. Attribution can be done in many ways:

- Source codes—the current standard in the industry for heavy direct mail organizations.
- Gift codes to attribute a gift to a department.
- · Reporting on things like gift date and channel after the donation has been processed.

The type of attribution you do depends on your business needs. Be on the lookout for new way.

10

Merge/Purge, Validation and Postal Discounts

Key Points

- Run a merge/purge on your data when you acquire new lists of prospective donors. You can outsource this to a third-party vendor.
- 2. You can bypass the merge/purge process by using Salesforce's Data Cloud.
- 3. Address validation helps you qualify for postal discounts.

Merge and Purge

Merge/purge is the process of bringing two data sets together and purging out the duplicates. When you purchase an acquisition list, you want to make sure that you are not purchasing names that you already own (i.e.: existing donors, volunteers, etc). The merge/purge process ensures that this does not happen.

The process is usually done for nonprofits by a vendor such as Infogroup, Merkle, MMI, or Donorbase. As the nonprofit, you would provide your vendor two files. The first would be an export from your Salesforce database ("house file" in direct mail speak). It usually has IDs, names, addresses, and maybe an email address. Next, you will provide this vendor with the acquisition list you purchased. That acquisition file will also have names and addresses. The vendor will take both files and standardize the addresses. From there, they will then remove any names in the acquisition file that are also in your house file. This results in a final acquisition file that has your current constituents removed. This final file is then what you send to the mail shop for printing.

Alternatively, you can use Data Cloud to harmonize your data from many sources, including acquisition lists. After mapping your data and defining matching and duplicate rules, Data Cloud will perform Identity Resolution resulting in a unified profile of your constituents. In this case, no records are deleted or "purged" they are consolidated into a unified profile consisting of prioritized sources of contact information such as most used, last updated, or from a particular source.

Learn more about Data Cloud if you are not familiar with it.

Postal Discounts for Nonprofits

In order to qualify for a nonprofit bulk mail rate, the USPS will require you to:

1. Validate or standardize your addresses.

This makes your data look nice and ensures that USPS automated systems can read and route your mailings easily. This is the process of ensuring that all of the addresses in your database meet a standard format. For example, you would have "Street" abbreviated as "St." Most nonprofits in the United States will base this off of the United States Postal Service (USPS) format. There are multiple tools provided by the USPS which define these address formats, but many nonprofits use third-party vendors to aggregate this data from the USPS and make it easier to use. The Salesforce AppExchange also has multiple vendors who offer this service. If you search for "Data Validation" in the AppExchange, you'll find several who work well with nonprofit data.

2. Run a National Change of Address (NCOA) service on your database.

The NCOA database, managed by the USPS, tracks all address changes or moves in the US. For example, if your constituent moves from Chicago to Miami, you'd get their new Miami address from the NCOA database. Most nonprofits use a third-party service to run a NCOA process on their database. This third-party service will run your entire database of constituents against the NCOA database. If this service spots someone in your database who has moved, it will provide an updated address for that constituent.

You can search the <u>Salesforce AppExchange</u> for "Address Standardization" and "National Change of Address" or "NCOA." The cost of running these services is usually lower than the amount of money saved in postal discounts, so it is a very good investment.

11

Reporting and Dashboards

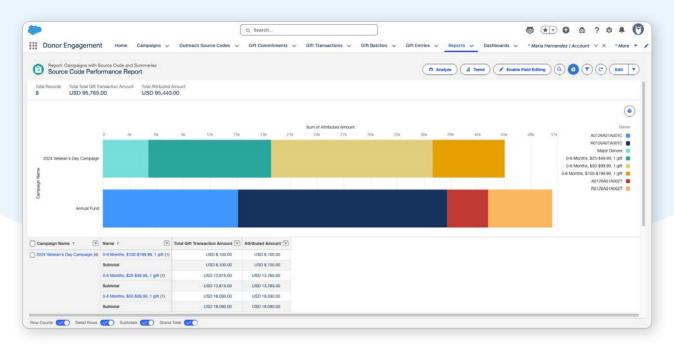
Key Points

- 1. Focus your reports on the campaign/outreach source and gift transaction objects.
- 2. Keep dashboards high-level for executive and overview reporting.
- 3. Tableau is a great option for very complex nonprofit direct mail analysis.

You can do robust reporting with Nonprofit Cloud. Not only can you take advantage of all of the robust reports and dashboards capabilities of the Salesforce platform, but you can also expose report charts on records in Salesforce. For example, you could have a source code performance report and display it on a campaign. If you are not familiar with Reports and Dashboards on the platform, start with the Reports and Dashboard Trailhead Module.

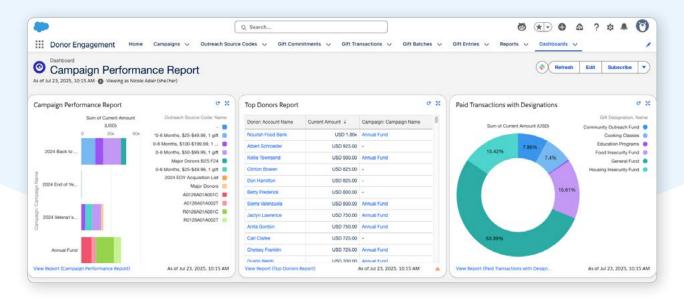
When you're doing reporting for direct mail, the primary objects you will be looking at in Salesforce are Gift Transaction and Outreach Source Code or Campaign. If you chose to build out separate objects for packages or creatives, then you may want to consider that as well. Executive level reporting may focus at the Campaign level while those running the direct response program may want to build reports and dashboards that reflect performance at the Outreach Source Code level.

The most important thing to remember in this case is that every donation (Gift Transaction) will have an Outreach Source Code and Campaign associated with it. In order to analyze the performance of your marketing, you can report on donations and break those donations down by outreach source code and campaign/parent campaign. Here is one report example showing gifts by source code and campaign:



Dashboards

Use dashboards to get a glance at how your fundraising is doing at a high level. Along with reports, you can also create dashboards focusing on your direct mail efforts. As a best practice, keep these a bit more generic than your reports. Because dashboards are really designed to be a snapshot of the state of your business, you want them to reflect that. Dashboards should focus on overall source code performance or campaign performance, direct mail categories (e.g. acquisition vs renewals), and year-over-year growth. This will give you and your leadership the quick snapshot needed to analyze your current business trends. If you want to then drill down deeper, you can click any dashboard component to see the full report. The screenshots below give you an example of how some organizations design their Dashboards.



Tableau

Salesforce Nonprofit Cloud's standard reports are excellent for operational monitoring and quick, in-CRM data checks. They are your daily pulse.

Tableau, on the other hand, is your strategic analytical engine. For nonprofits serious about optimizing their direct mail investment, understanding donor behavior at a granular level, and demonstrating clear ROI, Tableau moves beyond basic reporting to become an indispensable tool for strategic decision-making.

Tableau excels at transforming complex data into intuitive, interactive dashboards. Users can dynamically filter, drill down, and explore data from multiple angles. This enables direct mail managers to quickly identify trends, pinpoint high-performing segments, and understand the "why" behind campaign successes or failures without needing to request new reports.

In essence, while Salesforce tells you what happened, Tableau helps you understand why it happened and what to do next to maximize your direct mail fundraising impact.



The Nonprofit Team At Salesforce



Everyone who wants to change the world should have the tools and technology to do so. Technology is the most powerful equalizer of our time, providing access to data, knowledge, and above all–connections. Salesforce gets our technology in the hands of nonprofits and education institutions so they can connect with others and do more good. As a social enterprise, the more missions our technology supports, the more we invest back into technology and communities, creating an endless circle of good.

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