

Is Salesforce right for my organization?

Factors to consider before moving CRMs



Presenters



Kirsten Anderson
Vice President of Digital Services and Innovation
Catholic Social Services – Edmonton, Alberta, Canada

Kirsten is a people centric technology leader that loves leading holistic technology transformation in organizations. She is an experienced systems thinker that understands technology, process, governance and the people side of change. Her sweet spot is acting as a translator between IT and the operational areas of the organization, and she loves storytelling with data. She is passionate about how digital enablement can drive employee and client experience in addition to transforming organizational operations. Kirsten has worked for over 20 years in the public and non-profit sectors and holds a Master's Degree in Public Administration from the University of Victoria.



Lou Bialon-Crane
Supervisor, Nonprofit Relationship Management
RSM US

Lou is a 7x certified Salesforce Solution Architect with nearly ten years experience delivering solutions to nonprofit, higher education, and healthcare and life science organizations. He has a background in nonprofit operations and fundraising, with a deep understanding of nonprofit processes and intricacies. Lou has worked in and served organizations across various industries and focus areas – from complex multi-national medical organizations to small arts organizations with limited resources. Lou delivers sophisticated solutions built with a focus on simplicity and longevity.

Emcee



Jamie Van Nostrand
Manager, Nonprofit Relationship Management
RSM US

Jamie has worked in nonprofits as a fundraiser and development operations director for nearly 20 years and has been in the Salesforce ecosystem for 10 years. She brings extensive knowledge of nonprofit operations, data strategy, CRM implementations, and project management.

Introduction to the case

The Client



CATHOLIC
SOCIAL
SERVICES

Sign of
Hope!

WHERE WE ARE

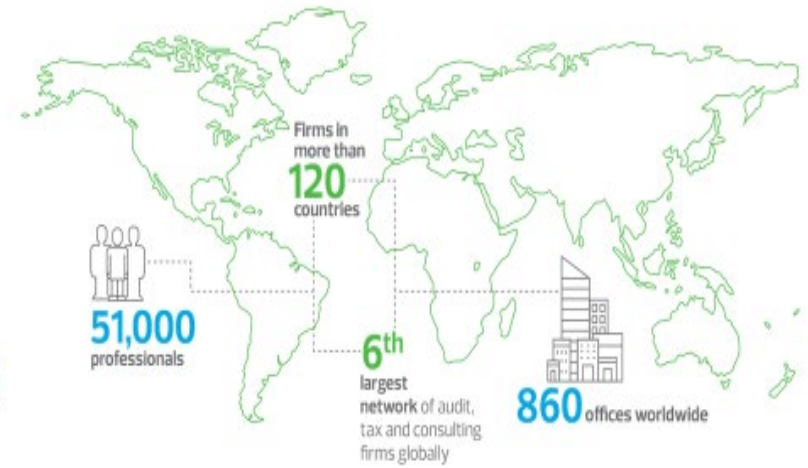


The Firm - RSM

Global reach, national strength, local touch

Business advisors who take time to understand your industry, your goals, your opportunities

RSM International is a **global network** of independent audit, tax and consulting firms.



The Firm

RSM Salesforce Team

TEAM

10+ YEARS
 SALESFORCE consulting partner
 EMERGING GLOBAL SI

200+
 SALESFORCE CERTIFICATIONS

SALESFORCE MVP hall of fame
PLEDGE 1%
 ECOSYSTEM LEADERSHIP

CLIENTS

700+
 CLIENTS

Industries - Nonprofit Solutions - 501(c)(3)
 Charities, Foundations, Community Funds,
 Social Services, Alumni, Political, Cultural &
 Arts, etc.
 We also do Association Solutions - 501(c)(6)

2000+
 PROJECTS

REVIEWS

4.83/5
 CSAT RATING
 SALESFORCE PARTNER PROGRAM

★★★★★
 AVERAGE RATING
 SALESFORCE appexchange

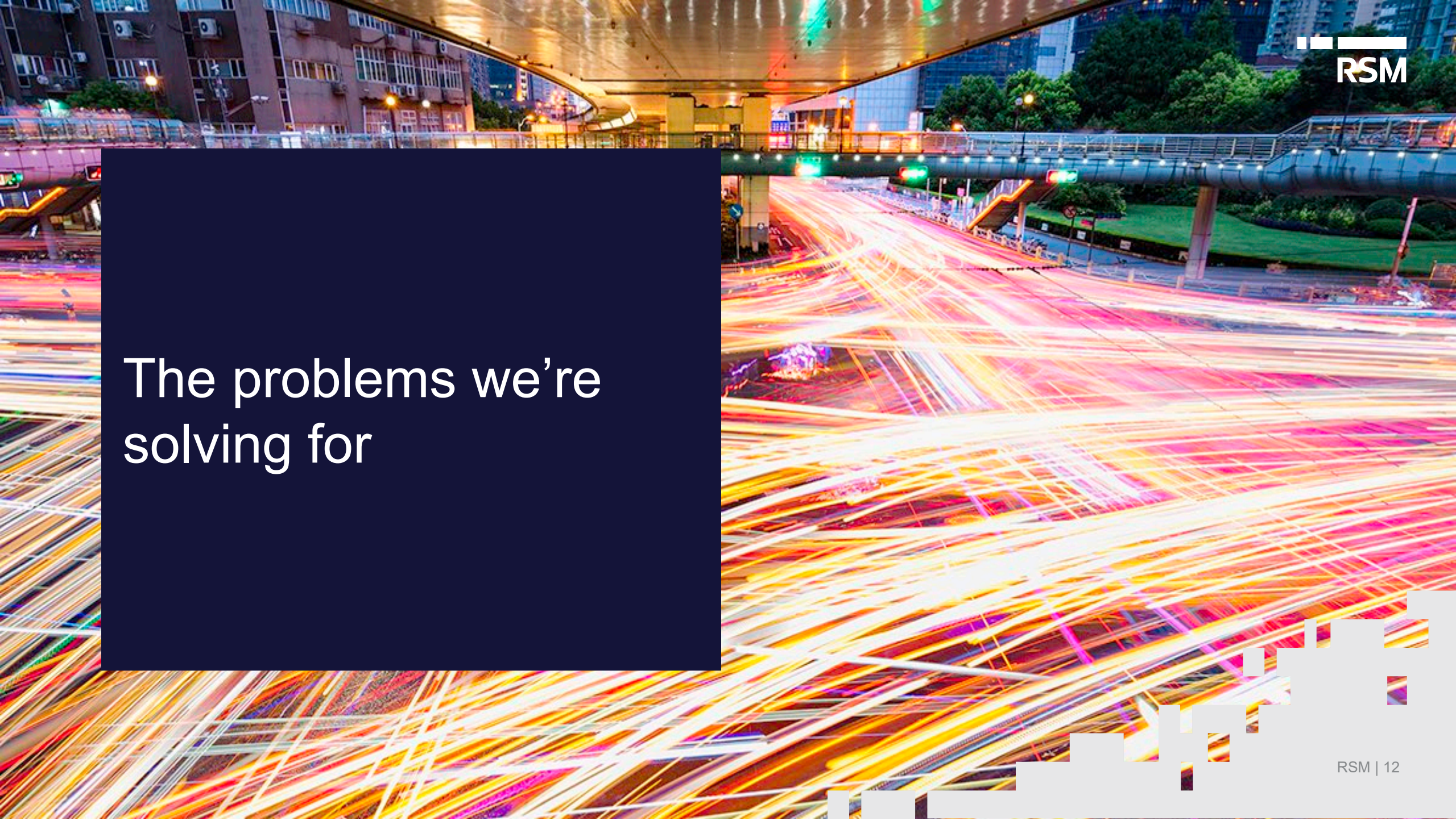
★★★★★ (10) Read RSM reviews on appexchange
 ★★★★★ (8) Read RSM reviews on Clutch
 ★★★★★ (4) Read RSM reviews on UpCity
 ★★★★★ (9) Read RSM reviews on G2

Charting the course


Choosing the tools

Setting up the team

Salesforce's Nonprofit Cloud



The problems we're solving for

The background of the slide is a vibrant blue sky filled with numerous black graduation caps with gold tassels, captured in mid-air as if they have just been tossed. The caps are scattered across the frame, creating a sense of movement and celebration.

Go live and
future phases

Questions?



THE POWER OF BEING UNDERSTOOD

ASSURANCE | TAX | CONSULTING

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