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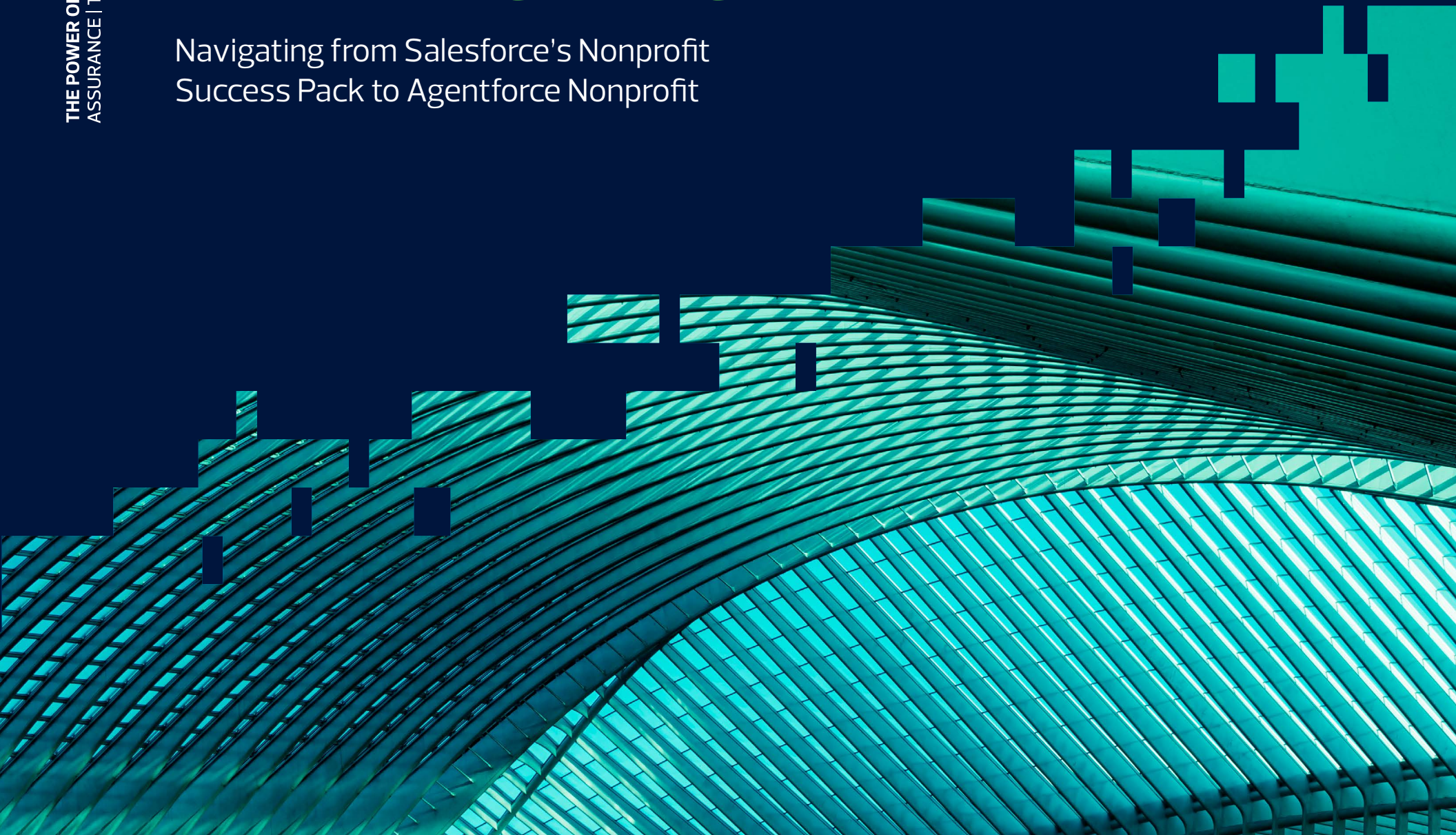
Salesforce Agentforce Nonprofit migration guide

Navigating from Salesforce's Nonprofit Success Pack to Agentforce Nonprofit



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Introduction

This guide is designed to assist nonprofits in their transition from Salesforce's Nonprofit Success Pack (NPSP) to Agentforce Nonprofit, formerly known as Nonprofit Cloud. It provides a comprehensive overview of the benefits, planning and preparation necessary for a successful implementation. As Salesforce continues to innovate, Agentforce Nonprofit will be the primary focus for future developments, offering advanced functionalities and industry-specific features that were not available in legacy products.

This guide will help you decide on the best path forward, plan your migration and prepare your organization for an Agentforce Nonprofit implementation.

Deciding

Over the years, Salesforce has offered several nonprofit products including NPSP, Outbound Funds Module (OFM), Grants Management (GM) and more.

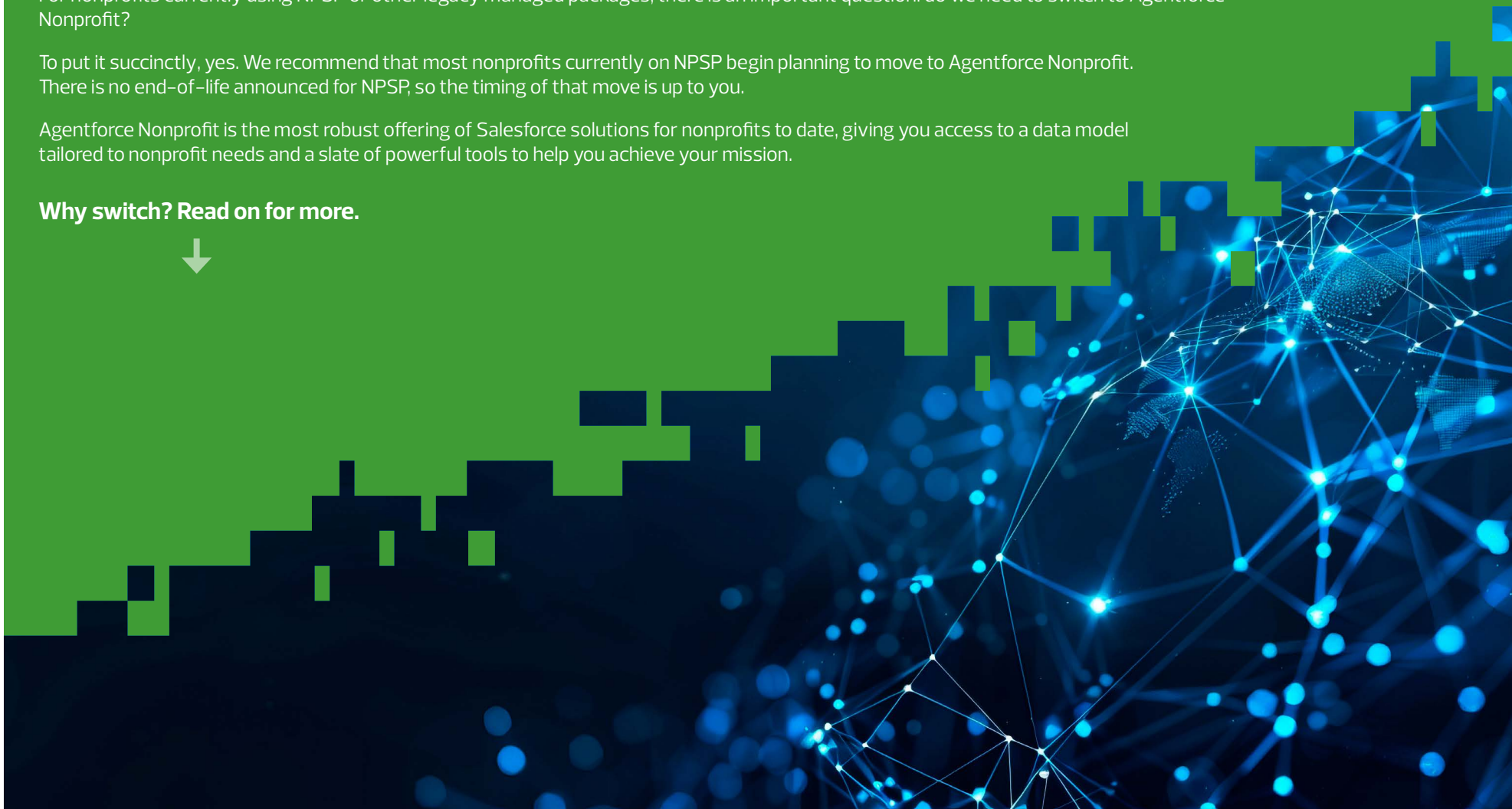
In 2023, Salesforce released Agentforce Nonprofit, previously known as Nonprofit Cloud, a suite of powerful solutions for nonprofits to fund, deliver and measure their impact on a unified platform.

For nonprofits currently using NPSP or other legacy managed packages, there is an important question: do we need to switch to Agentforce Nonprofit?

To put it succinctly, yes. We recommend that most nonprofits currently on NPSP begin planning to move to Agentforce Nonprofit. There is no end-of-life announced for NPSP, so the timing of that move is up to you.

Agentforce Nonprofit is the most robust offering of Salesforce solutions for nonprofits to date, giving you access to a data model tailored to nonprofit needs and a slate of powerful tools to help you achieve your mission.

Why switch? Read on for more.



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Supercharged solutions for nonprofits

Agentforce Nonprofit supercharges the functionality we know and love from legacy products and offers new functionality and innovation. All future innovations for the nonprofit sector on Salesforce will be on Agentforce Nonprofit. This includes huge advances in volunteer management, artificial intelligence, marketing and Data Cloud.

For a full feature comparison between Agentforce Nonprofit and Salesforce's managed packages for nonprofits such as NPSP, Program Management Module OFM, GM and more, **click here.**

Access to best-of-class industry features, only in Agentforce Nonprofit

For the first time, with Agentforce Nonprofit, nonprofits have access to the wealth of features available through Salesforce Industries called industry common components. These components deliver powerful functionality perfected across various industries including the public sector, health care and more.

Refer to the chart to discover more.

Industry common component	Description
Action Launcher	Add repeatable actions to a launcher so that your users can easily launch actions
Action Plans	Define templated and ad hoc tasks, assessments or documents needed to complete a process
Actionable Segmentation	Segment similar constituent profiles, curate them, and design timely and personalized outreach programs
Actionable Relationship Center	Visualize relationships between people and businesses through interactive components
Batch Management	Automate the processing of a high volume of records
Business Rules Engine	Determine eligibility and automate complex decisions through a powerful processing engine
Compliant Data Sharing	Configure advanced data sharing rules to improve compliance with regulations and company policies
Data Processing Engine	Transform data from across Salesforce and write back to Salesforce records with a powerful processor
Document Checklist Items	Manage file uploads and approvals for when constituents need to provide required documents
Dynamic Assessments	Build guided questionnaires to assess participants using dynamic questions and conditional functionality
Events and Milestones	Easily view your constituents' life events and milestones from their profile
Identity Verification	Standardize identity verification with a process that is flexible, provides an audit trail and helps combat identity fraud
Interaction Summaries	Capture constituent notes and view notes in chronological order
Interest Tags	Capture constituent needs and interests with customizable interest tags to design personalized outreach at scale
OmniStudio Document Generation	Generate documents individually or in a batch by pulling data from across Salesforce into Microsoft Word (.docx) and Microsoft PowerPoint (.pptx) templates
OmniStudio FlexCards	Create flexible components that can be deployed to various channels
OmniStudio OmniScripts	Craft styled process wizards without code and deploy to multiple channels and devices
Party Relationship Groups	Relate individuals to each other in groups such as households or trusts
Record Alerts	Help users decide what needs attention, including the ability to create custom severity values for alerts
Timeline	Display key events related to programs, participants, benefits, and other standard and custom objects

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Salesforce Foundations and artificial intelligence

Salesforce Foundations is a new offering of key features in Agentforce, Sales Cloud, Service Cloud, Marketing Cloud Growth, Commerce Cloud and Data Cloud. It is available for free to customers on the enterprise edition and above.

No matter if you are on NPSP or Agentforce Nonprofit, your organization can leverage Salesforce Foundations. However, certain Agentforce features, such as purpose-built agents for nonprofits, will only be available in Agentforce Nonprofit.

Planning

Begin planning early for your organization's path toward Agentforce Nonprofit. Agentforce Nonprofit cannot be implemented in an existing NPSP environment; a new implementation is required. Depending on the complexity of your needs, an implementation can take anywhere from a few months to a year or more.

Determining a timeline

Consider the following to determine when it makes sense to switch:

Upcoming initiatives

Are you undertaking large initiatives or planning substantial investments into your current environment? If so, it may make sense to implement Agentforce Nonprofit first to prevent rework or duplicative costs down the road.

Buy-in and appetite for change

Do you have an appetite for a new solution across your organization? If a strong buy-in across your organization is missing, it should be fostered prior to embarking on a migration. Find change agents to grow openness to new opportunities on Agentforce Nonprofit.

Internal capacity

What does your internal capacity look like? Are other priorities taking up bandwidth from key teams? A migration is a significant undertaking and requires input from teams across your organization to be successful.

Upcoming calendars

Do you have upcoming busy periods or blackout dates? Do you have hard deadlines such as contract renewals or major events? These should be factored into an implementation plan.

Release schedule

Check the release roadmap if you need specific functionality that is new or only partially available, such as volunteer management.

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Picking an advisor

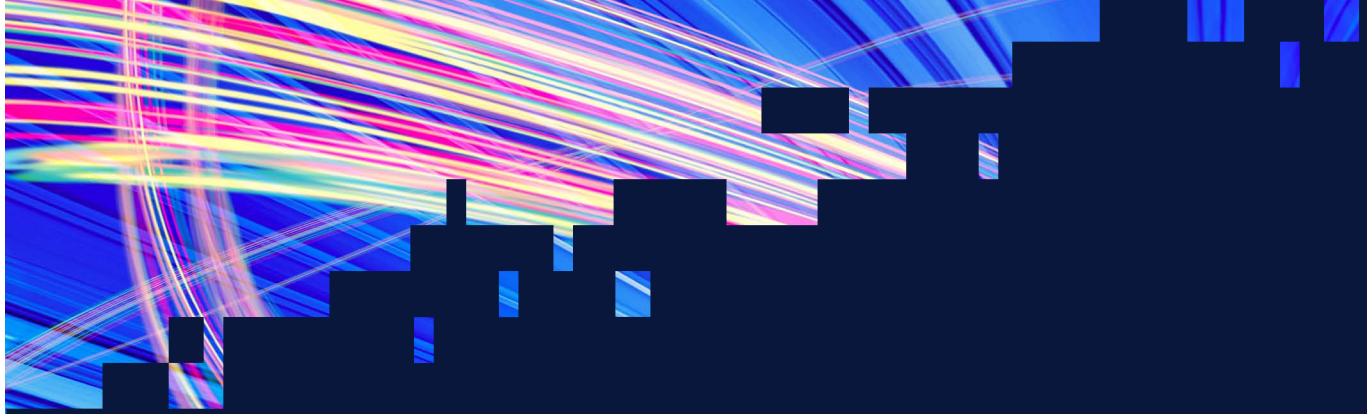
Do not attempt a migration to Agentforce Nonprofit without a Salesforce implementation advisor. Not only does RSM have robust experience in Agentforce Nonprofit implementations, but we also understands the unique needs of nonprofit organizations. Our team works with nonprofits, with deep and practical experience in the nuances and complexities of the industry. We are leaders in the Salesforce ecosystem with extensive experience implementing Agentforce Nonprofit, NPSP, Marketing Cloud and related products across case management, fundraising, grantmaking and more.

RSM helped Catholic Social Services in Edmonton, Alberta, Canada, make the switch to Agentforce Nonprofit.

Engage your implementation advisor early. RSM will be there with you every step of the way, from change management to implementation and ongoing support.

"RSM's team brought real nonprofit experience and deep industry insight—it made an immediate impact."

– Christian Vezina, Vice President of Technology and Quality Improvement, Catholic Social Services



Preparing

Whether you plan to migrate to Agentforce Nonprofit this year or in five years, you can take steps now to prepare for a successful transition.

Data hygiene

Before migrating from NPSP to Agentforce Nonprofit, it's crucial to undertake a comprehensive data hygiene process to ensure a smooth and effective transition. Over time, data in your system can become inconsistent, outdated or duplicated, which may slow a successful system migration. Begin by conducting a thorough audit of your existing data to identify inconsistencies, inaccuracies, redundancies and incomplete records. This process includes verifying contact information, donation histories and engagement records to make sure they are current and accurate. Addressing these issues proactively will prevent the transfer of flawed data into the new system, thereby maintaining data integrity and reliability.

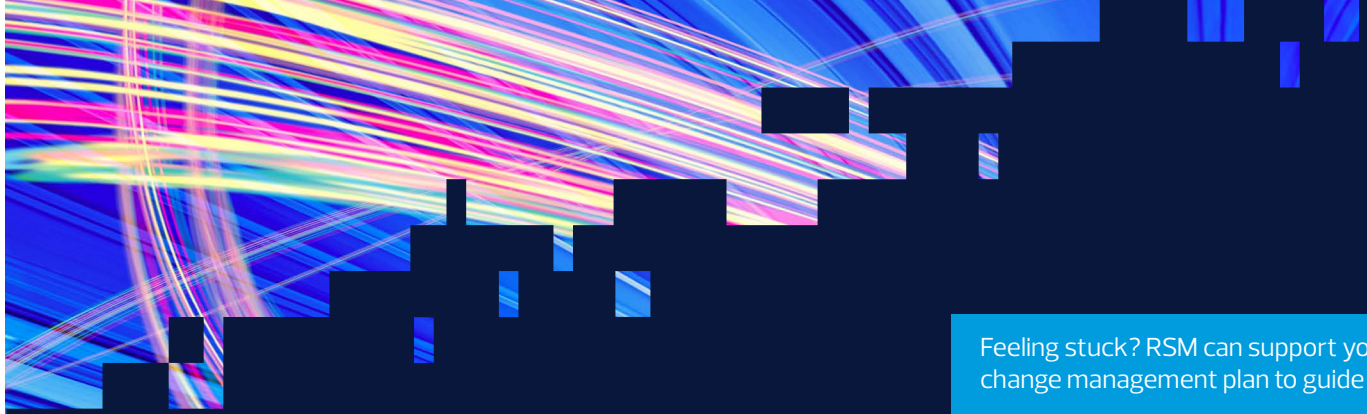
Additionally, it's important to assess and map your current data structures to align with Agentforce Nonprofit's data model, which may differ from NPSP's configurations. This step involves understanding how existing fields and objects may translate into the new system, ensuring that critical information is preserved and correctly categorized. RSM can provide valuable guidance during this process by conducting a comprehensive data audit, standardizing data formats and assisting in clearing duplicate records. When it is time to migrate, RSM has a quick start process to migrate standard NPSP data objects and fields into Agentforce Nonprofit data objects.

Data governance

To ensure proper data governance in preparation for migration, your organization should:

- **Define clear data ownership and stewardship:** Assign specific roles and responsibilities for data management to ensure accountability and clarity in data handling processes. Data classification can also be defined for fields within Salesforce.
- **Establish data standards and policies:** Develop and enforce policies for data entry, formatting and maintenance to promote consistency and quality across the organization.
- **Implement access controls and security measures:** Ensure appropriate access levels and security protocols to protect sensitive information and comply with privacy regulations.
- **Leverage data quality tools:** Employ tools and processes to regularly assess and improve data quality, identifying and rectifying errors or inconsistencies before migration.
- **Engage stakeholders in governance processes:** Involve key stakeholders in developing and overseeing data governance practices in order to align with organizational goals and user needs.

Robust data governance is vital when implementing new systems. A well-defined data governance framework goes a long way to make sure data remains accurate, consistent and secure throughout the migration process. This not only facilitates a smoother transition but also lays the groundwork for leveraging Agentforce Nonprofit's advanced features to enhance program delivery and stakeholder engagement.



Feeling stuck? RSM can support your organization in the development of a change management plan to guide a Agentforce Nonprofit implementation.

Process documentation

Process documentation is crucial to make certain all necessary automations and business workflows remain accounted for. To this end, organizations should:

- **Identify and map "as-is" processes:** Work with each department (fundraising, programs, finance, etc.) to outline current workflows step by step. Define where each process starts and ends, the inputs/outputs and who (role or team) is responsible for each task. Create visual process maps (flowcharts, swim lanes or business process model and notation [BPMN] diagrams) that clearly show every step, decision point and handoff. Documenting processes this way provides a single source of truth. It aligns team understanding of how work is done and highlights inefficiencies or redundant tasks ripe for automation.
- **Use collaborative mapping tools:** Capture processes in user-friendly diagramming tools so the team can co-edit and review. Tools like Lucidchart can be used for real-time collaborative flowchart and process-mapping features, and tools like Miro can be used for online whiteboarding and workshop-style process mapping. Many nonprofits already have access to Google Workspace or Microsoft Office; even Google Drawings or Excel/Visio templates could be used to sketch process steps. Use standard notations or templates (e.g. BPMN shapes, swim lanes, or Salesforce process libraries) to keep diagrams consistent and easy to understand.
- **Engage stakeholders and validate maps:** Involve a cross-functional team in every stage of process documentation. Conduct interviews and workshops with frontline staff, managers and volunteers to gather accurate process details. After creating a draft process map, walk through it with stakeholders to confirm each step, role and data use. Incorporate their feedback and obtain sign-off on the "as-is" map before considering any future-state processes.

When beginning to document your processes, start simple and prioritize high-impact processes (like gift processing, volunteer onboarding or membership renewal). Keep diagrams easy to follow and avoid overly complex charts. Finally, treat this documentation as a living asset; review it periodically with stakeholders to ensure processes remain efficient and aligned with your mission.

Funding

You'll likely need to secure additional funding for an Agentforce Nonprofit implementation. Get the support of your board early and secure necessary funding prior to beginning your migration project.

Need help creating a budget? RSM can support you in determining an appropriate budget for your implementation project.

Change management

A migration to Agentforce Nonprofit is a large undertaking that will change the way your teams operate. Prepare for this in advance to successfully manage that change.

An effective way to support reluctant teams through large operational changes is to designate change agents across your organization. These cross-functional change agents can align teams, build trust and champion change.

However you decide to manage change, be sure there are there is strong support for your teams throughout this process.

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Conclusion

No matter where you are on your journey toward Agentforce Nonprofit, RSM is here to help. Our team understands the unique needs of nonprofit organizations and is committed to supporting you every step of the way. From change management to implementation and ongoing support, we help establish a smooth transition to Agentforce Nonprofit. Set up a free consultation with us today to discuss how we can assist you in achieving your mission with the advanced capabilities of Agentforce Nonprofit.

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