

# Life after Salesforce

User adoption and implementation strategy  
from social impact organizations

“There was life before Salesforce, and  
there was life after Salesforce!”<sup>1</sup>

---

<sup>1</sup> Quote from interview with Anand Sharma, Head of IT, Teach for India, August 12, 2015.

## **Purpose of this document**

The purpose of this document is to provide the most extensive survey of and primary research on the use of Salesforce as a cloud-computing solution for social impact organizations working internationally to date. This document contains survey and interview data intended to provide best practices for social impact organizations who are using or will use Salesforce.

## **Intended audience of this document**

This document is intended for program staff, IT managers, and development practitioners who are curious about Salesforce and interested in learning more before potentially using it. We assume a basic level of IT knowledge, as it is beyond the scope of this report to provide an introduction to ICT4D or an overview of the various tools being used in the ICT4D space.

## **Principal Investigators**

Gaspar Rodriguez, gaspar.rodriguez@tufts.edu

M.A.L.D. 2016, Tufts University, The Fletcher School of Law and Diplomacy

Aditi Patel, aditi.patel@tufts.edu

M.A.L.D. 2016, Tufts University, The Fletcher School of Law and Diplomacy

## **Faculty Advisor**

Jenny Aker

Associate Professor of Development Economics, Tufts University, The Fletcher School of Law and Diplomacy

## **Keywords**

Salesforce, Force.com, Social impact organizations, User Adoption, Cloud-computing

# Acknowledgements



# Table of contents

Terms and definitions	5
Executive summary	6
Introduction	7
Why Salesforce	8
Why social impact organizations choose Salesforce	10
Aims of the study	13
Study methodology	14
State of the field	15
Utility and behavior	16
Aggregate global survey results and selected tables	23
Perspectives from implementers	36
From theory to practice	39
Case studies	
Sanergy, Kenya	42
Dasra, India	46
Population Council, Kenya/Zambia	51
JSI R&T, USA	54
Limitations and further research	58
<i>Annex 1: User adoption models for technology</i>	59
<i>Annex 2: Survey instrument</i>	61
<i>Annex 3: Interview instrument (SIOs)</i>	73
<i>Annex 4: Interview instrument (implementers)</i>	77

## Terms and definitions

**CCS** Cloud Computing Solution: computing infrastructure (processing, memory, and storage of data), platform applications, and software services for firms with access to the Internet. Firms pay a subscription or a license fee, without investing in the underlying infrastructure.<sup>2</sup> Cloud computing refers to both the applications delivered as services over the Internet and the hardware and systems software in the datacenters that provide those services.<sup>3</sup> CCS consists of three major categories.

**SaaS** Software-as-a-Service: a category of CCS that provides software licensing and a delivery model, in which a company licenses software on a subscription basis

**PaaS** Platform-as-a-Service: a category of CCS that provides a platform for customers to develop, run, and manage custom applications

**IaaS** Infrastructure-as-a-Service: a category of CCS that provides virtualized computing resources such as servers and storage

**SF** Salesforce.com: a leading US cloud-computing company that offers business enterprise products as the Sales Cloud, Marketing Cloud, and Analytics Cloud

**NPSP** Nonprofit Starter Pack: a Salesforce application that is preconfigured to help nonprofits manage donors, households, relationships, donations, and gifts

**CRM** Constituent Relationship Management: an approach to managing a company's interaction with current and future customers

**SIO** Social Impact Organization: an organization explicitly working towards social impact, typically a Non-profit, B-corporation, Non-governmental organization, or social enterprise

**ICT4D** Information and Communication Technologies for Development: the use of information and communication technologies in the fields of socio-economic development, international development, and human rights

---

<sup>2</sup> World Bank, *Digital Dividends Report*, 2016

<sup>3</sup> Michael Ambrust et al, "Above the Clouds: A Berkeley View of Cloud Computing". February 10, 2009.

## Executive summary

Cloud computing solutions are quickly replacing traditional IT systems for core business functions for companies all over the world. The international development sector is increasingly capitalizing on this trend, as cloud computing offers social impact organizations flexibility and the ability to save on costs (such as hosting IT infrastructure in-house) like never before.

One of the most popular cloud computing solutions being adapted for the international development sector is Salesforce.com. Salesforce.com is a leading US cloud-computing company that offers business enterprise products, such as the Sales Cloud, Marketing Cloud, and Analytics Cloud. With its discounted licenses program for nonprofits and flexible customization, it offers a robust platform for core nonprofit functions such as grant and event management; monitoring and evaluation; data collection; and program management.

While extensive research has been conducted on how private sector businesses are using cloud computing and Salesforce.com, little research exists on how social impact organizations are using Salesforce.com to meet their needs and driving successful implementations. This research gap is especially present for organizations outside the US and Europe. Given the unique challenges these organizations face, we believe that sharing lessons about their successes and failures of their implementations is critical in order to help the international development community ensure that technology in social change can be done more efficiently.

This research asks how social impact organizations that work internationally are using Salesforce.com and Force.com and how they drive user adoption to lead to a successful implementation. We present the findings from our global survey, as well as four case studies of select organizations that had complex implementations typical of the international development sector. The survey data consists of 60 social impact organizations working across 12 countries; US, UK, The Netherlands, Kenya, India, Rwanda, Uganda, South Africa, Nigeria, Ghana, Indonesia, Australia. By using existing models of user adoption to analyze these findings, our goal is to provide social impact organizations looking to use Salesforce.com or Force.com with resources and strategies to help drive successful implementations.

## Introduction

Cloud computing solutions (CCS) are increasingly replacing traditional IT infrastructure for businesses around the world. Offering a range of applications and integrations with other software, CCS can provide robust solutions for business functions such as sales, marketing, and mobile services. As Salesforce.com founder and CEO Mark Benioff states:

“Cloud computing has changed the way enterprise business applications are developed and deployed. Organizations no longer need to buy and maintain their own infrastructure of servers, storage and development tools in order to create and run business apps. Instead, companies can gain access to a variety of business apps via an Internet browser or mobile device on an as-needed basis, without the cost and complexity of managing the hardware or software in-house.”<sup>4</sup>

Globally, developed countries have been the dominant drivers and adopters of CCS to power their business needs. Given the widespread applications of CCS<sup>5</sup>, the nonprofit and international development sectors have started to adapt existing CCS tools and develop sector-specific applications. The cloud ecosystem and prevalence of platforms has allowed social impact organizations (SIOs) to take advantage of drastically reduced barriers to entry into world-class products, services, and computational capacity. However, the Information and Communication Technologies for Development (ICT4D) sector remains underrepresented in primary research that details the implementation processes and best practices for utilizing and managing CCS solutions in the developing country context. Though there is much sharing of best practices and success stories within the nonprofit community, the current body of research is limited to usage and products of nonprofits in major global “hubs” in the U.S. and Europe, where large international nonprofits and multilaterals have the resources to implement CCS and the voices to share their experiences doing so.

Moreover, the ICT4D sector requires contextual considerations and targeted products given the environments in which it operates—constrained by budgets and infrastructure availability, linguistically and culturally diverse environments, with differing levels of education and technological capability. This results in SIOs requiring high levels of CCS customization, one-off solutions for select projects, and additional applications or integrations to fully meet their requirements.

---

<sup>4</sup> Salesforce Annual Report, 2015

<sup>5</sup> Cisco, Cisco Global Cloud Index: Forecast and Methodology, 2014–2019 White Paper, accessed at: [http://www.cisco.com/c/en/us/solutions/collateral/service-provider/global-cloud-index-gci/Cloud\\_Index\\_White\\_Paper.html](http://www.cisco.com/c/en/us/solutions/collateral/service-provider/global-cloud-index-gci/Cloud_Index_White_Paper.html)

## Why Salesforce

One of the most comprehensive and fastest growing CCS platforms is Salesforce.com (SF). Since its founding in 1999, SF has grown from a customer relationship management (CRM) solution to a suite of cloud-based enterprise applications, analytics and mobile products with over 150,000 business customers, \$5 billion in revenue, and nearly 4 million individual users.

“We believe that the convergence of cloud, social, mobile and data science technologies is fundamentally transforming how companies sell, service, market, engage and innovate. We believe Salesforce is at the forefront of delivering more than a system of record and a system of engagement, but also a system of intelligence for companies of every size and industry to connect with their customers in entirely new ways.”<sup>6</sup>—Marc Benioff, CEO

SF’s Software-as-a-Service (SaaS) offering provides off-the-shelf products that businesses use to meet their CRM needs. These core products are the Sales Cloud, Marketing Cloud, and Service Cloud. They are being used to manage the marketing (campaigns, leads), sales (accounts, contacts, opportunities, orders), and service (cases/tickets, knowledge) aspects of customer business management.<sup>7</sup>

SF’s Platform-as-a-Service (PaaS) offering, Force.com, allows users to build custom applications and data models within the existing SF infrastructure. For most SIOs included in this report using SF in developing countries, the distinction between SaaS and PaaS is extremely relevant because most use custom-built systems on Force.com. This is in stark contrast to SIOs in developed countries who primarily use the SaaS and Non-Profit Starter Pack (NPSP) offerings.

**Salesforce** - (SaaS) all SF cloud solutions fit into this category, including Sales Cloud, Service Cloud, Analytics Cloud, Marketing Cloud, and the Nonprofit Starter Pack

**Force.com** - (PaaS) includes application development tools and development platform that organizations use to build custom applications within the SF infrastructure.

SF is on track to reach \$10 billion in revenue and expand into new markets by 2020. In 2015, the International Data Corporation (IDC) released a study of the SF Economy that included 1,142 organizations in eight countries. The study found that, over the next four years, SF will:

---

<sup>6</sup> Salesforce Annual Report, 2015

<sup>7</sup> David Berman, Quora.com



## Why social impact organizations choose Salesforce

The Salesforce Foundation (now Salesforce.org) is a separate 501(c)(3) organization started the year after Salesforce.com (the company) was founded. Salesforce.org administers the Power-of-Us Program and manages nonprofit and higher education clients. To date, 28,000 nonprofits and higher education institutions are using SF globally. Additionally, Salesforce.org has donated more than \$80 million in grants and SF employees have volunteered more than 840,000 hours in the last 16 years as part of their innovative 1/1/1 model. This model donates 1% of product (licenses), 1% of employee time (volunteering), and 1% of revenue (grants) to eligible nonprofits around the world.

The Power-of-Us Program effectively eliminates the cost barrier for most social impact organizations (SIOs) wanting to use what would otherwise be a prohibitively expensive platform. For qualifying SIOs, the program includes:

- 10 free enterprise edition licenses for life
  - Organizations can choose to the Nonprofit Starter Pack (NPSP) or Clean Slate
- Deep discount on additional licenses
- Discounts on SF training and events
- Access to nonprofit and higher education specific user groups, events and webinars
- Discounts on participating apps and consulting partners from the AppExchange<sup>10</sup>

In an effort to help nonprofits quickly adopt SF, Salesforce.org offers the QuickStart Program. For a flat rate of \$5,000, new users are linked with experienced consulting partners who are familiar with the specific needs of nonprofit organizations. Under a predefined scope of work, QuickStart implementations helps organizations maximize their Salesforce potential in a quick, 40 hour consulting engagement that can be done remotely. Salesforce.org currently recommends four partners, three of which were interviewed for this study, as QuickStart implementers: Cloud for Good, Exponent Partners, Idealist Consulting, and KELL Partners.<sup>11</sup>

SF has a specific suite of applications marketed to its non-profit users known as the Nonprofit Starter Pack (NPSP) and NGO Connect. The majority of SIOs use the NPSP for essential functions, such as donor management, volunteer events, marketing campaigns, and CRM, at the headquarter level. For example, United Way adopted the Sales Cloud to manage all of their constituent data in one place, including employment history, past giving, issues they care about, volunteer activity, and events they've attended.<sup>12</sup> The Polaris Project powers its toll-free

<sup>10</sup> Salesforce.org, Power of Us Program Eligibility Guidelines, <http://www.salesforce.org/nonprofit/power-of-us/eligibility-guidelines/>, accessed April 14, 2016

<sup>11</sup> Salesforce.org, QuickStart Program, <http://www.salesforce.org/help/quickstart/>, accessed April 14, 2016

<sup>12</sup> Salesforce.org, *Mile High United Way Takes Donor Engagement to New Heights with Salesforce*, <http://www.salesforce.org/stories/mile-high-united-way-takes-donor-engagement-to-new-heights-with-salesforce/>

hotline with the NPSP and the Marketing Cloud, fielding more than 100,000 calls, texts, emails, and website submissions a year in its fight against human trafficking and modern-day slavery in the US.<sup>13</sup>

While 360-degree views of constituents and interconnected data sources work well from Washington, DC to San Francisco, SIOs in developing countries are limited by current off-the-shelf SF products given that they need to track very specific and customized types of data in the field, without secondary or tertiary data sources to rely on. Often, these data sources have to be built from direct interaction. For example, Sanergy collects incredibly detailed data about solid and liquid waste from toilets within informal urban settlements in Nairobi, and then calculates how much of each type of waste is converted into fertilizer. This primary data collection requires a level of customization with unique architecture, fields, and complex business processes that does not fit squarely into off-the-shelf SF products.

Another major incentive to move away from SF products is the way licenses are structured. The NPSP requires the use of core Accounts and Contacts data models that require a more expensive, Enterprise license (\$150 per user per month). Solutions built on Force.com only require a platform or app cloud license (\$25 per user per month).

For these two major reasons, SIOs have found a robust application development environment using Force.com. *Figure 1* below illustrates use cases and the increasing need for customized SF/Force.com systems as interventions and on the ground programming for SIOs become more rigorous and, frankly, much more interesting. This report and study set out to target SIOs using SF on the far right of the spectrum, as literature and success stories are well documented for traditional, NPSP use.

---

<sup>13</sup> Salesforce.org, *Polaris Project guides victims to freedom with Salesforce*, <http://www.salesforce.org/stories/polaris-project/>

**Figure 2** Illustrative use cases of Salesforce for social impact organizations



For organizations implementing SF, they can be categorized into three types of adopters:

- Type "A" businesses (early adopters) believe technology is strategic and are aggressive early adopters of technologies, seeking tactical gains and knowledge useful in making future moves.
- Type "B" businesses (mainstream) adopt technologies when those technologies have proved useful. Selections are based on strategic planning and other enterprises' experiences.
- Type "C" businesses (followers) are cautious and motivated by finances, adopting technologies only when necessary and only when those technologies are strongly (financially) justified. Many opportunities are forgone to avoid risk or expense.

Our study found that most respondents (those at the far right end of the spectrum above) can be categorized as Type "B" or Type "C" business users. SIOs in particular are motivated by finances, since grant funding limits the risks they can take and any investment in technology must be first financially justified. The resource and capacity constrained realities of SIOs preclude Type "A" adopters from being aggressive about implementing SF.

## Aims of the study

Given that existing research and case studies on CCS—and particularly SF and Force.com—is focused primarily on non-profits in Europe and the US, this study hopes to bridge the gap between technology that is being used by and built for the developed world, with the needs and specific constraints of organizations pursuing international development in developing countries. The focus of this study is to understand internal decision-making and knowledge management activities SIOs experience during SF and Force.com implementations, with the intention of presenting these cases as guides for similar SIOs looking to implement a SF system. The successes, challenges, and best practices presented in this report serve as useful insights into what an organization can expect from an implementation, and, hopefully, provide practical suggestions for how to approach it. The main research question asked in this study is:

**What Salesforce and Force.com solutions are being adapted and used to meet the needs of social impact organizations globally, and how are these organizations managing the implementation process to best utilize and sustain these solutions?**

In our careers prior to conducting this study, we implemented or used SF and Force.com solutions for SIOs around the world, primarily in India, Latin America, and East Africa. Based on these experiences, we were driven to ask this research question and curious to understand the challenges that other similar SIOs experienced. In our own organizations, we found that early decisions made around system design, training, and getting buy-in were critical to determining whether a system flourished or floundered, and we set out to understand these gaps in similar organizations around the world via this study.

**Implementation strategy** and **user adoption** are especially important in the ICT4D field where the majority of projects and systems fail or partially fail, which are the central themes we hope to shed light on. Some of our guiding questions include: *What are these organizations using Salesforce or Salesforce-powered applications for? What are their biggest challenges, and how do they define success? Are they calculating return on investment to ensure that the system has been worth their time and money?*

Our goal with this research is provide answers to these questions, and to understand how SIOs are managing the processes of internal culture change, knowledge transfer, and transparency and accountability that arise from implementing a technology solution like SF. We hope that the findings presented in this paper provide ways for SIOs to learn from each other's experiences and lead to successful Salesforce implementations.

## Study methodology

In order to answer the research question stated above, we combined a global survey along with in-depth interviews of select respondents to understand their implementation process in greater detail. Specifically, our methodology entailed:

- **Literature review:** the literature reviewed falls specifically into the fields of ICT4D, cloud-computing systems, and user adoption models for technology projects
- **Participant selection:** the universe of SIOs using SF in developing countries is both small and not well particularly well-networked. We relied on snowball sampling to select participants, using word-of-mouth recommendations from our personal and professional networks. Participants included practitioners using SF directly, staff or consultants who participated in the design or maintenance of a SF system, and decision makers familiar with their SF implementation. This approach yielded 100 individuals spanning 70 organizations in 12 countries that were solicited to participate in the survey.
- **Global survey:** a survey was sent out to all our participants (survey instrument attached in the annex) to profile the organization and understand their implementation and user adoption processes
- **Interviews:** of the survey results that we found most interesting in terms of implementation strategy and user adoption, we selected 7 organizations based in India, Kenya, and the US (the headquarter offices) to interview in-depth about their experience using the system. Our selection criteria included how complex the system was, who the users were, how the implementation had been carried out, and how successful or unsuccessful their system was. 4 of the 7 interviews were then developed into the case studies presented in this report.
- **Implementer perspectives:** we conducted additional interviews with seven SF implementation consultants in order to triangulate our findings and get a macro-level perspective about nonprofit SF implementations, particularly focused on the relationship between consulting partners and clients

## State of the field

In the realm of ICT4D, practitioners, enterprises, researchers, and governments face important questions on the intricate balance between innovation, diffusion, use, and knowledge in a rapidly changing technology environment. *Do we adopt the tools of today? Are we sacrificing technology transfer and becoming dependent on tools and services built by developed countries?* These questions have been especially true recently in the widely documented technology and innovation arena of mobile phones. *Do we still keep pushing down the personal-computer based route when less than 0.5% of African villages have access to PCs? Do we jump to a technology that has already reached many low-income communities, mobile telephony, which already reaches more than 70% of the African population?*<sup>14</sup> As we now know, mobile has become the premier technology platform throughout the ICT4D landscape. Today, there are over 3.6 billion unique mobile subscribers. Half of the world's population now has a mobile subscription—up from just one in five 10 years ago. An additional one billion subscribers are predicted by 2020, taking the global penetration rate to approximately 60%.<sup>15</sup>

The same conversations that were had during the mobile boom are now being had about the CCS boom. Adopting CCS over software and proprietary IT is squarely within the ICT4D agenda in developing countries and for organizations and business seeking to become more effective and efficient. Organizations, governments, and countries need to make a choice on whether to adopt CCS or continue maintaining their own infrastructure. This entails difficult conversations about regulation, connectivity, resources, and leadership.

Countries are struggling to understand the progress of new technologies that depend on unhindered cross-border data flows such as the Internet of Things, “big data,” and CCS due to security and privacy concerns. In countries like Algeria, Kenya, South Africa, Nigeria, and Morocco, concerns around security and data protection are listed as either the biggest or second biggest barrier to CCS adoption in all five countries, and are especially strong in Kenya, where 71% of respondents listed it as the most significant deterrent.<sup>16</sup> While countries may have legitimate reasons to raise concerns and impose barriers on these methods that require open data flows, these barriers should not be a disguised method to impede trade and economic activities.<sup>17</sup> As the World Bank discerns, by imposing barriers on data flows, countries may mistakenly believe that they can encourage domestic data-driven sectors, like cloud service providers. Such policies are akin to import substitution strategies, which have had a mixed record.<sup>18</sup>

<sup>14</sup> Richard Heeks, *The ICT4D 2.0 Manifesto: Where Next for ICTs and International Development?*, 2009

<sup>15</sup> GSMA, *The Mobile Economy Report*, 2015

<sup>16</sup> SAP, *Moving to the Cloud – Africa Survey, 2014/2015*

<sup>17</sup> World Bank, *Digital Dividends Report*, 2016

<sup>18</sup> Ibid

Much evidence exists on the fact that new digital technologies and software diffuse much more slowly within developing countries, especially as a legacy of being *adopters* and *users* of technologies created elsewhere. For example, smartphone penetration, mobile broadband, higher-productivity agricultural applications, and digital sensor technologies remain a daunting diffusion, distribution, and infrastructure challenge in many regions. Similarly to choosing between landline and mobile, CCS presents a decision point for enterprises and SIOs in whether they continue using on-site, proprietary IT infrastructure or shift to world-class, newly affordable CCS. SIOs, particularly social enterprises seeking to enter undeveloped markets with innovative services, have the opportunity to dispense with sub-optimal databases and infrastructure needs by going straight to CCS. Organizations can now make use of cloud computing to lower system costs and mobile technology to expand services to even the least developed and most remote locations. For an SIO, cloud computing can drastically reduce the costs of entry in developing countries, implying substantial opportunities for innovation and future growth. Cloud computing has significantly reduced the fixed costs of starting a business in the last decade. Social enterprises and start-ups can use the latest computing infrastructure, video conferencing services, or online payment systems at a much lower cost.<sup>19</sup>

## Utility and behavior

### Incorporating proven user adoption models and implementation strategies

Over the past few decades, various information technology models have been constructed in the IT field in order to promote and predict the adoption of new technologies. While perhaps burdensome or impractical for SIOs to replicate these models for CCS, understanding what users prioritize and how to create an enabling environment for introducing new technologies can be a powerful tool for SIOs seeking to adopt CCS. Few SIOs have the time and tools to evaluate the potential impact of a new system, whether prior to or post implementation. Particularly important for SIOs to consider is the vast cross-cultural differences in technology acceptance, adoption and uptake. SIOs would do well to build these learnings into their implementation strategy to evaluate the success or failure of a new tool. This section will focus on two of the most prominent and relevant user adoption models within the IT field to our study – **UTAUT** and **DRG**. UTAUT is intended for individuals and DRG for implementation teams. Both these models were used to analyze the findings of our research.

---

<sup>19</sup> World Bank, *Digital Dividends Report*, 2016

## Unified Theory of Acceptance and Use of Technology (UTAUT)<sup>20</sup>

Intended for individual behavior and user adoption

This evolutionary model integrates significant elements from eight prominent user acceptance models: Theory of Reasoned Action (TRA), Technology Acceptance Model (TAM), Motivational Model (MM), Theory of Planned Behavior (TPB), Model Combining the Technology Acceptance Model and Theory of Planned Behavior (C-TAM-TPB), Model of PC Utilization (MPCU), Innovation Diffusion Theory (IDT), and Social Cognitive Theory (SCT). It formulates a unique measure with core determinants of user behavioral intention and usage (*see Annex for full description and evolution of UTAUT*). The purpose of formulating UTAUT was to integrate the fragmented theory and research on individual acceptance of information technology into a unified model. UTAUT consists of seven constructs that seek to identify the intentions of users to adopt information technologies:

- I. **Performance expectancy (PE)**: the degree to which an individual believes that using a particular system would improve his or her job performance
- II. **Effort expectancy (EE)**: the degree of simplicity associated with the use of a particular system
- III. **Attitude toward using technology (AT)**: the degree to which an individual believes he or she should use a particular system
- IV. **Social influence (SI)**: the degree to which an individual perceives that others believe he or she should use a particular system
- V. **Facilitating conditions (FC)**: the degree to which an individual believes that an organizational and technical infrastructure exists to support the use of a particular system
- VI. **Self-efficacy (SE)**: the degree to which an individual judges his or her ability to use a particular system to accomplish a particular job or task
- VII. **Anxiety (AX)**: the degree of anxious or emotional reactions associated with the use of a particular system

These constructs are hypothesized to be fundamental determinants of the user behavioral intention of information technology.<sup>21</sup> Gender, age, experience, and voluntariness of use are posited to moderate the impact of the four key constructs on usage intention and behavior. The UTAUT model (*figure 4*) has been used extensively to measure the adoption of e-learning, e-payment, and e-government systems in various countries, such as Finland, Germany, Taiwan, Belgium, and the US, with at least 43 rigorous studies having used UTAUT from 2004 to

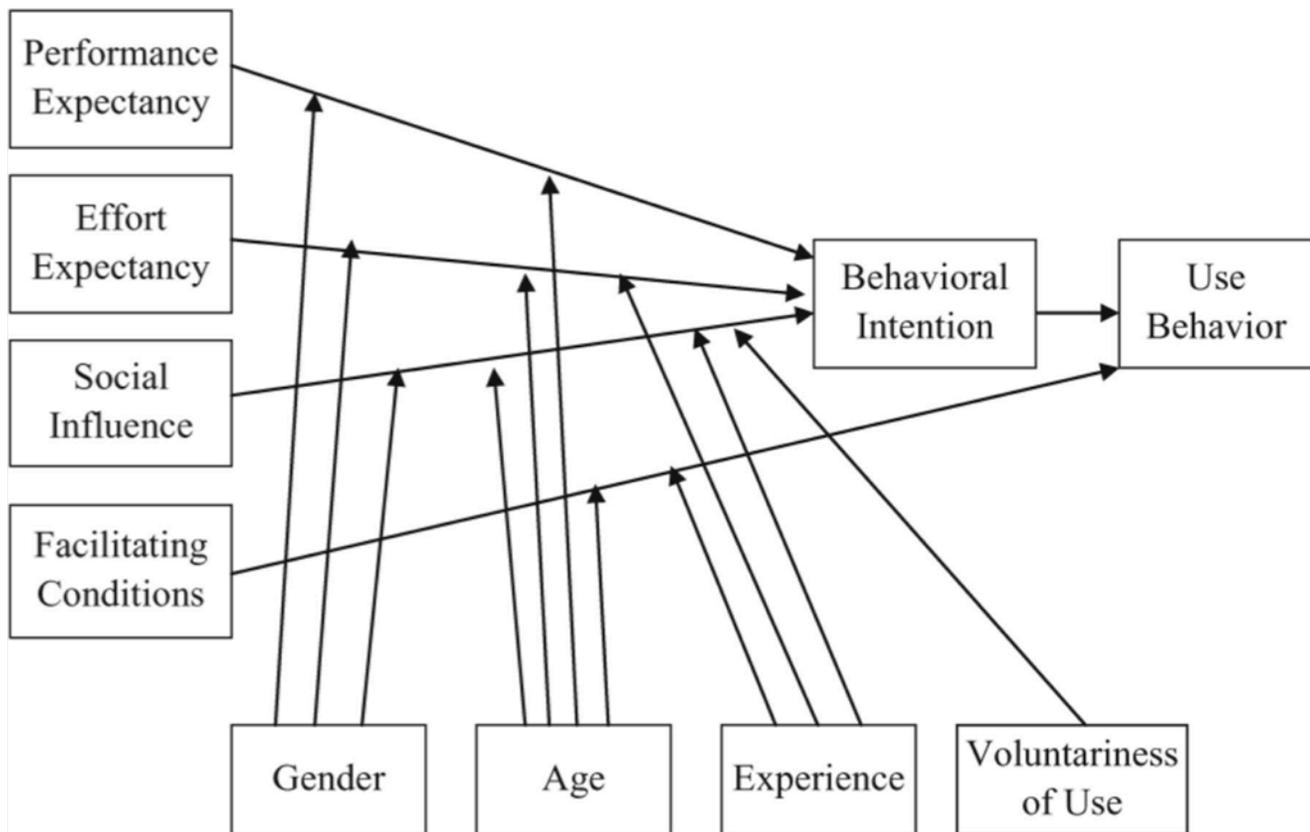
<sup>20</sup> Venkatesh et. al, *User Acceptance of Information Technology: Toward a Unified View*, 2003

<sup>21</sup> Thanaporn Sundaravej, *Empirical Validation of Unified Theory of Acceptance and Use of Technology Model*, 2005

2011.<sup>22</sup> The following section highlights the methods and finding used in some of those studies to provide a statistical and cross-cultural foundation for prevailing constructs of use.

Figure 3 UTAUT model

Source: Venkatesh et al. 2003



Oshlyansky, Cairns, and Thimbleby (2007) sought to apply the UTAUT constructs in nine countries and 1,080 participants across the Czech Republic, France, Greece, India, Malaysia, the Netherlands, New Zealand, Saudi Arabia, South Africa, the United Kingdom, and the United States. Their analysis suggests that the model is well validated to withstand translation and to be used cross-culturally.<sup>23</sup> Their country-by-country analysis of UTAUT provided further evidence that the questionnaire is working as intended in each of the sample countries and that translation did not hinder the performance of UTAUT.<sup>24</sup>

A 2013 UTAUT study of e-learning tools in Taiwan showed that **PE**, **EE**, **SI**, and **FC** proved to positively affect behavioral intention and use.<sup>25</sup> This means that when tools increase their

<sup>22</sup> Dwivedi et al., *A Meta-Analysis of the Unified Theory of Acceptance and Use of Technology (UTAUT)*, 2011

<sup>23</sup> Oshlyansky, Cairns and Thimbleby, *Validating the Unified Theory of Acceptance and Use of Technology (UTAUT) tool cross-culturally*, 2007

<sup>24</sup> Ibid

<sup>25</sup> Paul Juinn Bing Tan, *Applying the UTAUT to Understand Factors Affecting the Use of English E-Learning Websites in Taiwan*, 2013

performance, are easy to use, are suggested by peers or someone important to the user, or include facilitating conditions, users increase their behavioral intentions (BI) to use the tool.

A 2004 UTAUT study of a web-based tool reaffirms the positive effects of **PE** as having the greatest impact on behavioral intention (BI). The study also showed that **EE**, **AX**, and **SE** are important elements, while **AT** and **SI** were not significant.<sup>26</sup>

Although our study is exploratory and largely qualitative, the anecdotes related to us in the case studies presented here suggest that **PE** played a large role in successfully driving user adoption. Indeed, the aforementioned meta-analysis conducted in 2011 of rigorous UTAUT studies show that **PE** shows the highest number of significant relations with **BI**, followed by **SI**, **EE**, and **FC**.<sup>27</sup> The findings from these quantitative studies help us confirm qualitative evidence from the survey and interviews that comprise this study. The hope here is that SIOs will incorporate these learnings into their implementation strategy to create an enabling environment for the highest chance of success for use behavior.

## Design-Reality Gap Model (DRG)

Intended for organizational implementation strategy

Developed and refined by Professor Richard Heeks at the University of Manchester, the DRG model demonstrates that failures of ICT4D projects are associated with a large gap between design expectations and the actual realities of the project and its context. While DRG was originally applied to e-government projects, it is the most widely-used model and is oriented specifically towards ICT4D. The DRG framework can be used internally by organizations or project teams in preparing for a SF implementation. The model focuses on illuminating 'where we are now' (current realities) and 'where X project wants to get us' (assumptions and conceptions built into the project design).<sup>28</sup> Success and failure depends on the size of gap that exists between 'current realities' and 'design of the project'; the larger the gap, the greater the risk of failure - the smaller the gap, the greater the chance of success. DRG includes eight dimensions that are necessary and sufficient to provide an understanding of DRG:

<b>Information</b>	<b>Staffing and skills</b>
<b>Technology</b>	<b>Management systems and structures</b>
<b>Processes</b>	<b>Other resources: time and money</b>
<b>Objectives and values</b>	<b>Outside world</b>

<sup>26</sup> Thanaporn Sundaravej, Empirical Validation of Unified Theory of Acceptance and Use of Technology Model, 2005

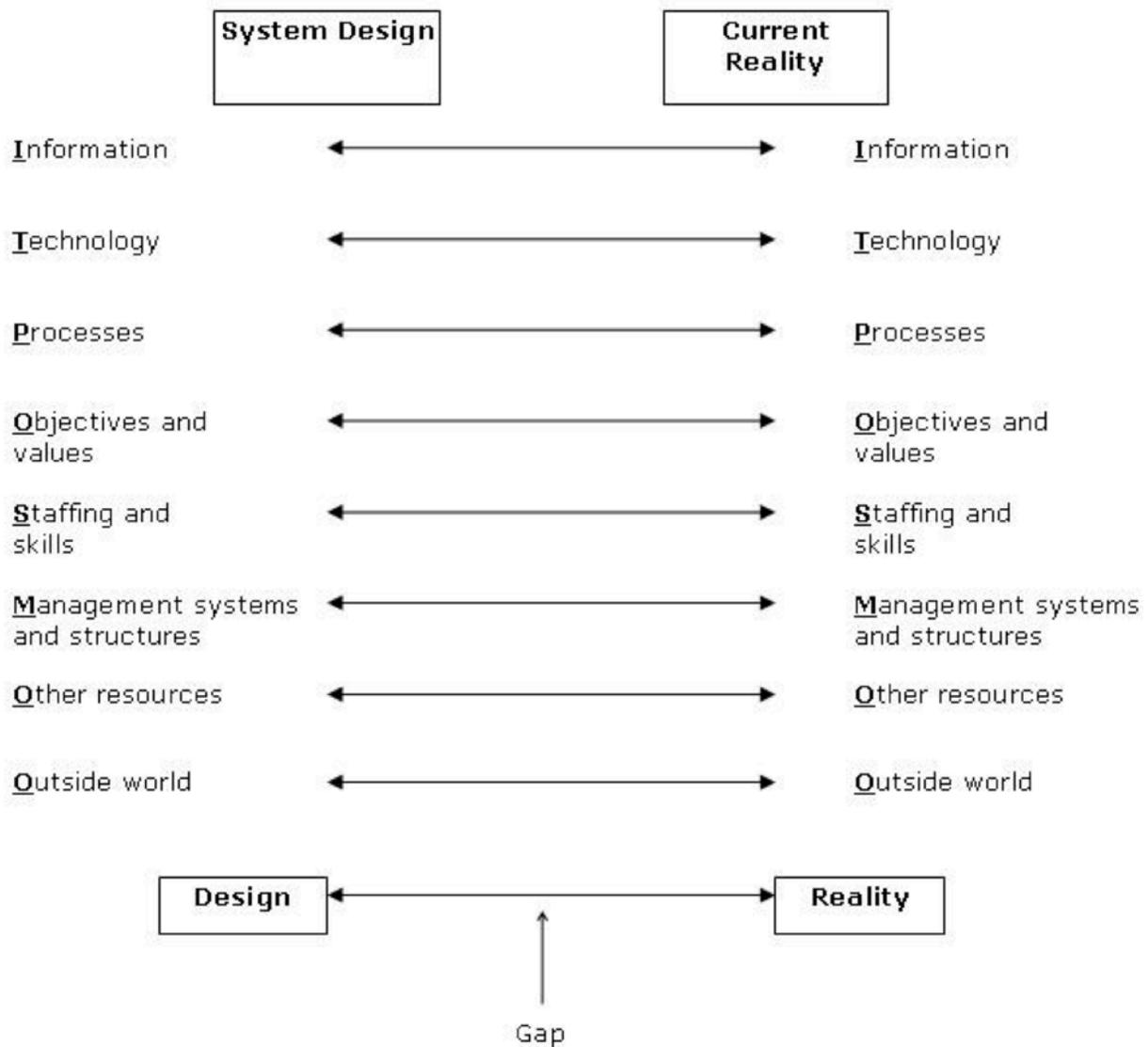
<sup>27</sup> Dwivedi et al., *A Meta-Analysis of the Unified Theory of Acceptance and Use of Technology (UTAUT)*, 2011

<sup>28</sup> Richard Heeks, *eGovernment for Development - Success and Failure in eGovernment Projects*, 2008

Combining these dimensions with the notion of gaps produces the model in Figure 4.<sup>29</sup>

Figure 4 Design Reality Gap model

Source: Richard Heeks, 2001



The DRG model can explain the organizational complexities, varied stakeholders, and computational environments of ICT4D implementations. Inevitably, conversations around the ITPOSMO dimensions are always had when teams or organizations are preparing for a new tool or system. DRG can provide a framework to help organizations think critically about a potential system or tool and identify where weak or problem areas may lie.

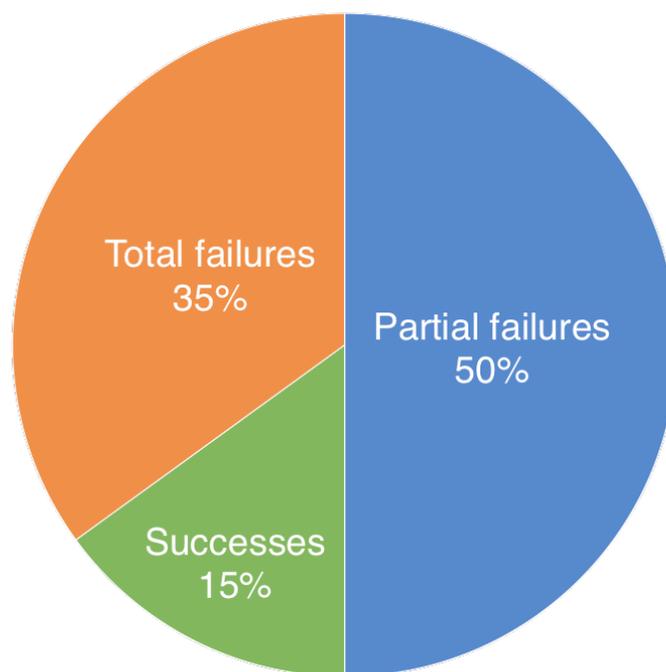
<sup>29</sup> Richard Heeks, *eGovernment for Development - Success and Failure in eGovernment Projects, 2008*

Furthermore, Heeks has applied the DRG to various systems and ICT4D projects over the last two decades. His broad conclusion is that decades of ICT4D implementations can be summed up with three words: failure, restriction, and anecdote.<sup>30</sup>

Figure 5 State of ICT4D implementations

Source: Richard Heeks, 2009

15% of ICT4D implementations succeed



Based on this assessment, Professor Heeks proposes new lessons on how the ICT4D conversation has shifted to truly identify progress:

- **Sustainability:** given the failure of many ICT4D projects to deliver and/or survive, there is a new emphasis on ensuring the longevity of projects and increased local ownership
- **Scalability:** given the limited reach of individual projects, there is a new search for scalable and interoperable ICT4D solutions
- **Evaluation:** given that ICT4D was often held aloft by hype and uncorroborated, self-interested stories, there is a new concern with objective evaluation of impacts<sup>31</sup>

<sup>30</sup> Richard Heeks, *The ICT4D 2.0 Manifesto: Where Next for ICTs and International Development?*, 2009

<sup>31</sup> Ibid

## Process-focused, inclusive implementation: learnings from the DRG model

Blueprint project designs can be characterized by drawing solely from the understanding of designers and developers rather than users; very rigid project implementation that does not deviate from the initial top-down plans; an inability to build appropriate knowledge that could help the project; a narrow reliance on external resources; and poor project leadership.<sup>32</sup> This type of project design continues to plague technology projects today. Especially in the realm of SIOs and ICT4D, the implementation strategy must include the involvement of everyday users, strong leadership, and an intense focus on knowledge management. For an SIO implementing SF, it is likely that the majority of use typically involves beneficiary-facing users – site staff, loan officers, or surveyors. The day in and day out realities of these roles should be the most critical part of an organization's system design and implementation process. These roles should be at the table during the design and decision-making process for a new tool or system and they must be continually involved throughout the implementation. Once tools are optimized from this perspective, results can flow upstream, providing a stronger data chain with more proficient users, which can lead to stronger user adoption.

Moreover, ICT4D implementations usually involve introducing new tools that are completely different than those being employed previously to conduct the same task. Thus, SIOs should pay particular attention to change management and user adoption. Heeks' process approach to ICT4D projects would include:

- **Participation** of beneficiaries in the design and/or construction
- **Flexibility** and improvisation in the implementation
- **Learning** in order to improve implementation (embracing both learning from past experience and iterative learning-by-doing during the project)
- **Utilizing and building local capacities** including those of local institutions
- **Competent** leadership that is able to promote the other four elements<sup>33</sup>

In addition, this process approach can help close gaps because of the way it exposes project realities, and enables flexible and iterative changes to both design and reality.

---

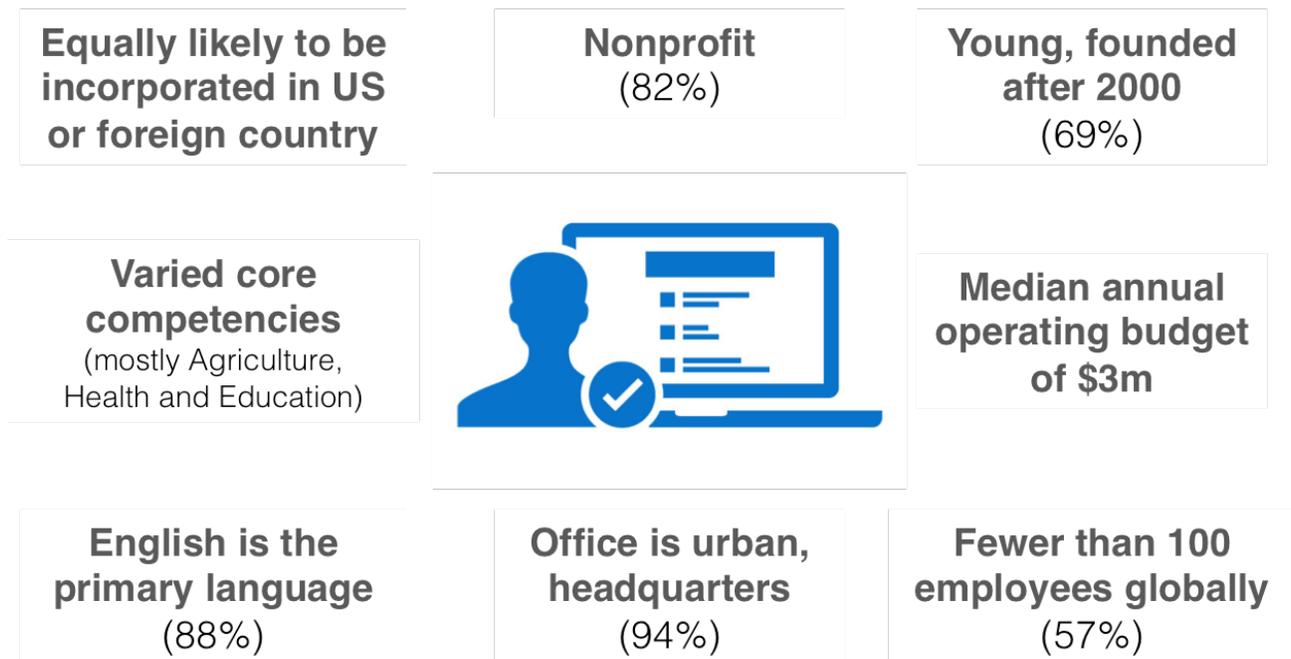
<sup>32</sup> Ibid

<sup>33</sup> Ibid

## Aggregate global survey results and selected tables

Based on the organizational profiles collected in the global survey, the typical SIO respondent can be represented by the following archetype.

Figure 6 Survey respondent archetype



This section includes selected responses and tables, organized by each section of the global survey: *Organizational profiles, Perspective on Salesforce offerings, System design and readiness, Level of effort expectations, Rating the Salesforce Platform, Training and user adoption, and Post-implementation*. Questions that were text or comment-based are omitted from the table groupings, though these valuable insights are highlighted as quotes. For all tables, n = 60. 0% values are included to show our own survey design and reality gap where we expected responses but none were recorded.

Table 1 Organizational profiles

<b>Describe your office type</b>	
Headquarters	79%
In-country	15%
Other	4%
Regional	2%

<b>Describe your location type</b>	
Urban	94%
Rural	6%

<b>Number of employees (globally)</b>	
1 – 5	4%
10 – 20	21%
20 – 50	15%
50 – 100	17%
More than 100	43%

<b>What is your organizations legal structure?</b>	
Registered charity/non-profit	82%
Other	8%
Hybrid	6%
B-corporation	2%
University/Higher-education	2%
Government agency	0%
C-corporation	0%

<b>Primary spoken language (at your organization)</b>	
English	88%
French	2%
Spanish	0%
Portuguese	0%
Hindi	6%
Marathi	0%
Swahili	2%
Kinyarwanda	0%
Other	2%

<b>Please rate your organization's technology capacity/familiarity prior to implementation</b>	
0 (low)	9%
1	9%
2	11%
3	11%
4	9%
5	16%
6	11%
7	13%
8	9%
9	0%
10 (high)	2%

The question “What is your organization’s legal structure?” notes that no C-corporations and only 2% higher-ed institutions were included in our sample, a marked difference in respondents from existing SF literature. Additionally, while respondents represented SIOs in 12 different countries, the business language was 88% English. The predominance of English could present a training challenge given that 50% respondents report that trainings were conducted in more than one language (*see Table 7 - User Adoption and Training*). Unsurprisingly, most SIOs are using SF in an urban setting and at a headquarter level. Leveraging the DRG model, this allows SIOs to get buy-in and usage from key stakeholders and access to computational environments and reliable internet required to implement and use SF.

Table 2 Core competencies represented

<b>Core competencies of your organization</b>	
Health	38%
Education	25%
Gender	23%
Agriculture	21%
Livelihoods	21%
WASH (water, sanitation, and hygiene)	17%
Access to finance/micro-credit/micro-finance	17%
Supply chain	10%
Consulting or professional services	10%
Other	33%
Environment/Waste Recycling Online Donation Platform Sanitation Leadership Capacity building in Indian education space Economic Research Advice Research, evaluation Environment and land tenure Environment Migration, Trade, Environment (Climate, Forests), US policy, Multilateral Development Banks Preventing violence against children and preventing violence against women Emergency response Renewable cooking energy, supply chain, transport, health, etc.	

33% of respondents core competencies were not represented in our listing. While challenging to propose a collectively exhaustive list of what each SIO considers their core competency, a category like *Energy and Environment* was a glaring omission and perhaps would have constituted a significant grouping of respondents. Ultimately, we can see that core competencies varied across the SIO sample using SF. This bolsters the programmatic footprint of SF and contributes to the broad community of international development practitioners using the platform.

Table 3 System design and organizational readiness

<b>Which cloud computing services/platforms did you consider for your implementation?</b>		<b>What did you initially intend as the main use of this platform?</b>	
Salesforce/Force.com	100%	Monitoring and evaluation	42%
Google App Engine	19%	Donor management	15%
Amazon Web Services	10%	Grant management	13%
Microsoft Azure or 365	4%	Sales/Customer service	10%
Other	10%	Other	8%
Microsoft CRM		Collecting field data	4%
Box		Case management	4%
		Mobile data collection	4%
		Event management	0%
		Finance, Human Resources or Accounting	0%
		Supply chain	0%
<b>Did you conduct an internal feasibility study?</b>		<b>Did you conduct a readiness program?</b>	
Yes	23%	Yes	23%
No	33%	No	42%
Don't know	44%	Don't know	35%
<b>Did you conduct a feasibility study with an external partner?</b>			
Yes	15%		
No	53%		
Don't know	32%		

Less than a quarter of SIO respondents report conducting an internal feasibility study or evaluating their organizational readiness to adopt such a platform. A key insight we can confirm here is that most SIOs do not adequately prepare for implementing SF, which can lead to a mismatch of expectations that is well documented by implementers. Particularly for budget and time constrained SIOs, readiness and feasibility can be evaluated using the DRG model prior to implementation. As noted earlier in this report, the DRG model can provide a formal structure for conversations around the ITPOSMO dimensions that SIOs must consider when implementing a tool like SF. This model can help organizations identify where weak or problem areas may lie and equip SIOs to work effectively with internal staff and external implementers.

Table 4 Level of effort expectations

How did you implement this project?		What was the anticipated timeline for this project?	
In-house	11%	1 month	2%
Third-party contractor/consultant	48%	2 months	7%
Hybrid (of two listed above)	39%	3 months	26%
Other	2%	4 months	7%
		5 months	5%
		More than 5 months	52%

Approximately how many outside consultants or contractors were involved with this project?		Approximately how many internal staff were involved with this project?	
1 – 2	65%	1 – 2	39%
3 – 5	35%	3 – 5	39%
6 – 8	0%	6 – 8	13%
9 – 10	0%	9 – 10	4%
More than 10	0%	More than 10	4%

Approximately how many hours, per week, were spent communicating with the implementer?		What were the primary methods of communication with the implementer?	
1 – 2	12%	Skype/web-conference	67%
3 – 5	44%	In-person	22%
5 – 10	40%	Email	54%
10 – 20	2%	Phone	17%
More than 20	2%	Other	2%

A new SF system for a small or medium sized SIO requires time and effort for staff who already wear too many hats. Typically, SIOs do not have a full time IT department and SF implementations are internally led by program staff, who lack tech skills and have likely never used SF. For these reasons, **only 11% of respondents report implementing SF completely in-house**, while most hire a third party vendor who specializes in SF. Whether implementing SF in-house or with a vendor, evaluating the Staffing and skills dimension of the DRG mode prior to implementation can help staff avoid a costly and frustrating mismatch of effort expectations. To consider when setting these expectations, **88% of respondents worked remotely with their implementer** and **96% of respondents reported dedicating less than 10 hours per week** to communicating with the implementer.

**Table 5** Perspectives on Salesforce offerings

<b>How did you first hear about Salesforce/Force.com?</b>	
Another organization	46%
Friend or Colleague	42%
Salesforce Website	6%
Other	6%
Marketing campaign	0%

<b>Did you go through the Salesforce Power of Us Program?</b>	
Yes	15%
No	43%
Do not know	41%

<b>Did you go through the Salesforce Quickstart Program?</b>	
Yes	7%
No	50%
Do not know	43%

<b>How did your Salesforce system start?</b>	
Used the Non-profit Starter Pack (NPSP)	34%
Used a 'Clean Slate' (standard Enterprise Edition)	27%
Built off an existing Salesforce/Force.com system	7%
Do not know	32%

SIOs in developing countries are completely outside the SF marketing and advertising umbrella—88% of survey respondents heard about SF through word of mouth from their peers. This creates a user base that has trouble distinguishing SF the entity from their implementer and cannot readily identify with flagship products, such as the Power-of-Ups and Quickstart Programs, offered by Salesforce.org—15% say they went through the Power-of-Ups Program and 7% say they used the Quickstart Program. Furthermore, only 34% of SIO respondents report using the NPSP product. From interviews with implementers working with nonprofits in the US, most report that ~90% of their clients are using the NPSP, reaffirming the more prevalent use of the Force.com platform within SIOs in developing countries.

Table 6 Rating the Salesforce platform

How would you rate Salesforce/Force.com as a platform throughout the implementation phase?				
	Agree	Neither Agree or Disagree	Disagree	I don't know
The platform was flexible	80%	13%	4%	2%
The platform was robust	78%	18%	4%	0%
The platform required extensive customization	76%	16%	4%	4%
Overall, customization required a high level of effort	67%	22%	4%	7%
The platform worked well with other tools/applications	51%	38%	4%	7%

Most SIOs using SF need a high degree of complexity from the platform, as the processes they are trying to translate onto the system are often not linear and deal with highly complex issues of social change. This leads to the increasing need for customization depicted in Figure 2. At the same time, SIOs need a robust system that allows them to customize the technology to the required level of complexity without sacrificing accuracy and while letting them effectively accomplish the task at hand. This balance of needing high complexity and finding a robust tool in Salesforce is present for most SIOs engaged in M&E, which includes 42% of survey respondents. Of those 42%, 77% say the platform is flexible, and 66% say the platform is robust. Of all survey respondents, 80% say the platform is flexible and 75% say the platform is robust. As one survey respondent noted, **“the high level of customization slows down the system, [which is] something we didn't consider. In addition the level of effort - even when working with a third party developer- to build out the system is huge- we very seriously underestimated!”**<sup>34</sup>

Of those same 42% who use SF for M&E, 77% say the platform required an extensive amount of customization and 66% say the customization required a high level of effort. The survey suggest high customization holds true for all intended uses: 75% of respondents say SF required an extensive amount of customization, 66% of respondents say customization required a high level of effort. Of respondents using the NPSP, 66% say it required extensive customization. One implementer provided a perfect analogy for the delicate balance between SF's complexity and power - **“It's like someone ships you all the parts for an F22, but there are no instructions. But, if you can put it together, you have an F22.”**<sup>35</sup>

<sup>34</sup> Survey response

<sup>35</sup> Interview with 501Partners

Table 7 User adoption and training

As a result of the new system, did you face internal challenges regarding...				
	Change management	Knowledge or technology transfer	Transparency or accountability	Human resources
Yes	60%	56%	23%	21%
No	31%	31%	61%	63%
Do not know	9%	13%	16%	16%

Was this project intended for office users, field users or both?		Please describe the involvement of field users in trainings	
Office users	39%	Involved in all trainings	15%
Field users	7%	Involved in some trainings	81%
Both	54%	Not involved	4%

Were trainings done in multiple languages?		Approximately how many total hours did the internal project team dedicate to internal user adoption and training?	
Yes	50%	1 – 5	8%
No	50%	5 – 10	8%
Do not know	0%	10 – 20	38%
		20 – 30	18%
		More than 30	30%

Change management for SIOs adopting SF is an inevitability. Sometimes it requires modifying a critical business process for office users or adopting a completely different way to collect data for field users. As one respondent stated, **“Field staff didn’t take much interest in learning the system and didn’t take ownership on what data is being uploaded onto the system.”**<sup>36</sup>

Successfully training users is one of the most challenging issues SIOs face. The reality is, you can never train enough. Training requires careful consideration of the amount of time spent on training, who was involved, the quality of training, and, particularly for SIOs, the language and method of training. According to another respondent, **“Staff are already working "more than 100%" and it's difficult to convince them an oz of prep is worth a pound of cure.”**<sup>37</sup>

<sup>36</sup> Survey response

<sup>37</sup> Survey response

Table 8 System documentation

Please indicate the level of priority for each type of documentation (i.e., how-to guides, training manuals, etc.) during implementation		
	Written documentation	Video documentation
0 (low)	2%	14%
1	11%	18%
2	20%	11%
3	5%	2%
4	9%	5%
5	14%	2%
6	7%	9%
7	7%	16%
8	14%	9%
9	5%	5%
10 (high)	7%	9%
	Mean   4.7	Mean   4.4

SIOs and implementers identify documentation as being critical to success, yet most survey respondents simply did not prioritize it. Video documentation presents a special case for this sample due to working in low-bandwidth environments where video is impractical. Whatever method is used, documentation is something most SIOs wish they'd done more of.

**“Our organization has a fairly high rate of turnover and internal job transfers, which have meant several handoffs of admin duties, some of which were not well documented.”<sup>38</sup>**

**“Document everything.”<sup>39</sup>**

<sup>38</sup> Survey response

<sup>39</sup> Survey response

Table 9 Post-implementation

Please indicate current system usage				
	Agree	Neither Agree or Disagree	Disagree	I don't know
The system is active	95%	0%	2%	2%
The system is being used as intended	79%	9%	12%	2%
The system is being used differently than intended	26%	21%	51%	2%
The system is meeting our needs	65%	26%	7%	5%
The project took longer than expected	37%	23%	30%	12%
The internal level of effort was as expected	49%	16%	30%	7%
The project cost was as expected	49%	21%	14%	16%
The system saves users time.	67%	23%	2%	7%

Do you believe this project was a good investment?	
Yes	84%
No	0%
Do not know	16%

Have you calculated or estimated the returns on this investment?	
Yes	9%
No	79%
Do not know	12%

Overall, would you recommend Salesforce/Force.com to other social impact organizations?	
Yes	95%
No	0%
Do not know	5%

Perhaps the most interesting response is the overwhelmingly positive Net Promoter Score for the SF platform—a definitive **95% of SIOs would recommend SF to their peers**. Though the journey of implementing SF is rife with challenges, difficult questions, and hard conversations, SIOs are overwhelmingly positive on adopting it. However, an area for further analysis is in the glaring **79% who have not calculated return on investment** in a formalized method, though anecdotal evidence is abundant.

Table 10 Recommendations from SIO users

Please provide the top 3 suggestions you have for other organizations implementing a Salesforce/Force.com system.
<ul style="list-style-type: none"> <li>• Be sure you're ready for it - that your business processes are solid before you even touch the system</li> <li>• Take administrator training and dedicate resources to your admin</li> <li>• Network with other Salesforce users via user groups</li> </ul>
<ul style="list-style-type: none"> <li>• Use a consulting/building firm specializing in social impact</li> <li>• Plan out your uses and all possible contingencies prior to beginning</li> <li>• Ensure all staff that will be using the tool are represented in initial conversations and throughout the building process.</li> </ul>
<ul style="list-style-type: none"> <li>• Have a very clear picture of exactly what you need the system to do and make sure everyone has the same understanding</li> <li>• Be prepared for some users to be slow to adopt the system and the need to provide extensive training</li> <li>• Designate one or two people from the organization to be the experts/troubleshooters for users (whether external or internal) to go to.</li> </ul>
<ul style="list-style-type: none"> <li>• Conduct in-depth analysis on what SF can/cannot do</li> <li>• Conduct feasibility studies with other orgs that have implemented SF</li> <li>• Beware of spiraling costs when plugging in other modules to the Force.com platform</li> </ul>
<ul style="list-style-type: none"> <li>• Cheap to implement</li> <li>• Great Reporting</li> <li>• Easy to learn and customize</li> </ul>
<ul style="list-style-type: none"> <li>• Hire a good SF administrator who knows the system</li> <li>• Don't try and teach yourself SF</li> <li>• Think through the design thoroughly - it is tough to undo</li> </ul>
<ul style="list-style-type: none"> <li>• Salesforce is a great system but do not expect an off-the-shelf system that will be trivial to use. It will require going up a significant learning curve. Have the right people in place to drive this - project manager, IT admin and program heads.</li> <li>• Whatever time and cost estimate you may arrive at, the actual implementation is likely to require more but will be ultimately worth it</li> <li>• Don't base your decision on the 10 free enterprise licenses. You will eventually need more, at which point you will need to choose between paying for enterprise functionality and using cheaper but more limited FAS licenses.</li> </ul>
<ul style="list-style-type: none"> <li>• Find a dependable 3rd party organization to manage and execute your salesforce platform. This will save you a great deal of time, money, and stress.</li> </ul>
<ul style="list-style-type: none"> <li>• Learn as much as you can about reports and dashboards before starting</li> <li>• Hire a developer</li> <li>• Start with the basics and use that system for 6-12 months before going deeper</li> </ul>
<ul style="list-style-type: none"> <li>• Limit the number of Salesforce vendors and systems being implemented simultaneously</li> <li>• Build the internal team's capability in Salesforce and project management vs relying on an outside consultancy to help implement</li> <li>• Test all of the vendors work for bugs internally before implementing.</li> </ul>

Table 10 Recommendations from SIO users *continued*

<ul style="list-style-type: none"> <li>• Unless someone in-house has experience with Salesforce, I recommend contracting with a firm that specializes in customizing Salesforce for your needs</li> <li>• When planning your timeline, include multiple user trainings. Holding multiple short training sessions was especially helpful for staff who had no experience with Salesforce, as it avoided information overload.</li> <li>• I highly recommend creating a users guide or training manual to introduce users to Salesforce.</li> </ul>
<ul style="list-style-type: none"> <li>• Use it!</li> <li>• Train a wide range of staff in how to use it and help them see how it helps them do their job better</li> <li>• Spend the money to have someone configure the system for you</li> </ul>
<ul style="list-style-type: none"> <li>• Be agile: Start small, and build. Don't worry about getting everything correct the first round.</li> <li>• Work with the foundation: they want to see us succeed</li> <li>• Build internal knowledge: Salesforce works best when it's updated on an ongoing basis. Create in-house skills that can respond to change requests.</li> </ul>
<ul style="list-style-type: none"> <li>• Start with the most critical/useable piece you can and then add other functionalities piece-by-piece.</li> <li>• Don't underestimate how important the building stage is to update your processes and adapt them to technology.</li> <li>• Train a strong system admin that will stay with the organization for the foreseeable future.</li> </ul>
<ul style="list-style-type: none"> <li>• You need a dedicated person in responsible for maintaining Salesforce and making adjustments along the way</li> </ul>
<ul style="list-style-type: none"> <li>• Most of our implementation is using custom objects which limits the type of reports and ways we can pull data for analysis.</li> </ul>
<ul style="list-style-type: none"> <li>• Make sure you have a clear, detailed rollout plan in place.</li> <li>• Ensure that everyone is clear on the roles and responsibilities in the system.</li> <li>• Make sure that people feel comfortable using the system -- SF can do a lot of things, which also makes it intimidating.</li> </ul>
<ul style="list-style-type: none"> <li>• Use consultants for big custom development, but develop/hire internal users for day-to-day and low- to middle- effort custom development (e.g. not Apex triggers)</li> <li>• Involve management from the beginning, so the message to all users is clear: SF is a priority and SF is built to help you do your job (if SF is not helping your users do their job, but is rather only helping management do theirs, expect to hire labor just to do data entry on other users' work)</li> <li>• Have SF champions in each physical location who push the use of Chatter (Chatter rules for adoption) and who make reports and dashboards actionable</li> </ul>
<ul style="list-style-type: none"> <li>• Make sure management and staff on board</li> <li>• Build in plenty of time for testing and revision</li> <li>• Be very aware of balance between ideal technical system and usability</li> </ul>
<ul style="list-style-type: none"> <li>• Spend more times on efforts to design the format. Involve all staff that will be affected by it to gain their inputs. Considering that once established, it's not that easy to make changes.</li> <li>• Clear about what are under our control and what are outside our control (so that should be done by salesforce team).</li> </ul>

Table 10 Recommendations from SIO users *continued*

<ul style="list-style-type: none"> <li>• Have a very clear vision (mock up even) of needs. Go into the detail, mocking up page layouts and reports in addition to stated goals</li> <li>• Link to business process for accountability (Ex: link reporting to existing regular reporting schedules or review meetings. Make this a management tool, both for managers and for team members)</li> <li>• Have fun, and make the system something the "cool kids" use. Incentivize with little or no cost, or provide a small budget. (Ex: Hold "office hours," give away candy, make gold stars, take photos of top users and say why, etc.)</li> </ul>
<ul style="list-style-type: none"> <li>• Ensure you have at least 1 full-time person dedicated to managing the system/keeping Salesforce up-to-date</li> <li>• Conduct trainings for all new staff who will be using the system.</li> <li>• Take the time to learn about all of the system's features (and recommend attending the annual Salesforce conference to learn more).</li> </ul>
<ul style="list-style-type: none"> <li>• Think about what functionality you might want in 5 years time, even if it seems unlikely now, and try to build the system in such a way that will facilitate this</li> <li>• Make sure the person who has a thorough understanding of your real-world processes is heavily involved in the design of the system</li> <li>• Learn a lot about Salesforce before diving straight in as you might end up being stuck between needing to make changes but not having the skills to do so, and therefore being required to pay someone else to do it.</li> </ul>
<ul style="list-style-type: none"> <li>• Careful assessment of internet functionality</li> <li>• Choose strong/experienced developer partner</li> <li>• Plan for multiple trainings for users (as well as continued TA)</li> </ul>
<ul style="list-style-type: none"> <li>• Develop internal business team champions of the system, and train and empower them using a Salesforce Council to discuss feature norms, reporting, etc.</li> <li>• The more you can rely on basic functionality (custom fields, page layouts, formula fields, etc), the easier it will be to maintain the system internally.</li> <li>• Develop a Monthly Development Cycle or adopt some sort of Agile methodology to handle new feature requests for the system in a transparent and easy-to-follow manner.</li> </ul>
<ul style="list-style-type: none"> <li>• Document everything</li> <li>• Be sure EVERYONE gets enough training</li> <li>• Build the new system they way you want, NOT a recreation of what you are doing presently. (Unless of course you love the system you have now)</li> </ul>
<ul style="list-style-type: none"> <li>• Really nail down scope/requirements as much as possible before beginning project</li> <li>• Conduct feasibility assessment (perhaps in conjunction with Salesforce team, who knows best what is necessary from an organizational point of view)</li> </ul>

## Perspectives from implementers

### Client trends and defining success

To provide a different perspective on implementation strategy and user adoption, this study interviewed seven implementers in the US, the UK, and India who are the leading nonprofit and SIO experts in SF. The interviews provided a valuable complement to our study and findings, though limitations exist in that 5 of the 7 implementers work predominantly with US clients. The primary themes uncovered during interviews with implementers are:

#### **Firms are working with non-technical, programmatic staff, instead of IT**

Low barriers to entry for platforms like SF, in terms of tech skills, into CRM systems and databases has worked to reduce the burden off of IT and a preponderance of non-technical, program staff to adopt SF. Two implementers confirmed this trend, but for different reasons:

“What I think we’re seeing more as a trend in the industry, is that some of these systems are moving out of IT and moving more into a holistic role for the organization. A database is less seen as something that an IT department needs to manage and deal with and more as a strategic tool for an organization that needs to be overseen and thought about programmatically. It mainly varies based on the size of the organization.” — BrightStep Partners

“[Nonprofits] don’t have huge amount of developers and technical people. It’s some poor admin person who is doing a bit of fundraising, bit of this, bit of that, and is also a system administrator for their SF instance, so he or she is asked to do quite a lot.” — Give Clarity

However, the ability to implement rapidly presents a drawback if the gap in skills is too large for an SIO. Most implementers identify themselves as “fixers.” New clients come to them with a broken or irreconcilable system that is no longer useful to. As one implementer describes:

“Our client base is going to come to us because they got Salesforce for free. They implemented it and had no idea what they were doing, and it’s a mess.” — 501Partners

#### **Firms report mixed feelings on an increasing requirement for customization**

While SF might be powerful and SIOs are eager to play with it, commonly cited limitations in the native interface or complex functionality and business processes leads to SIOs searching for custom development and programmers. When asked about whether they see this trend of custom development work, one implementer emphatically noted:

“YES...In fact this is the largest most significant requirement in the last 3 years. When Salesforce native functionality was released it was innovative and progressive. Minimal customization was needed to address client requirements. Now, Salesforce native functionality is simply not enough to meet this world of iPhone users and we now need to do heavy customization to meet client expectations.” — Idealist Consulting

SF has done well to deliver new, native products like the Process Builder and Lightning to address the frustrating drawbacks of handling complex functionality and the friendliness of the user interface. However, nonprofit implementers discourage their clients from custom development work as it introduces ongoing maintenance costs and a capacity burden.

“We’ve been seeing a lot of demand for customization. ... With us, a lot of it is what is the most sustainable solution for the client. We try really hard to start with baseline SF - as soon as you step into custom, you step into an ongoing maintenance cost. We try to avoid it. But I am seeing quite a lot of need [for customization] on the program side, specifically.”—501Partners

“I’m actually seeing a decrease in custom development, and that’s probably in part to the approach that we take. ... For most organizations it’s more about in house capacity building around the tool and configuration, instead of custom development work.” — BrightStep Partners

### **Firms face difficulties in measuring success and failure**

Frequent staff turnover and internal knowledge management perennially hinders SIOs. Normally just a frustrating reality of working in this sector, it presents a critical make or break for SF adoption. It is difficult to understand the value and impact of the system without giving it the full organizational support it requires in terms of user adoption and training. Two implementers expressed their frustrations:

“From an organizational perspective one of the key factors of success is how the client transfers their own internal knowledge through staff transitions. That isn’t something that the implementation partner has control over. ... We’ve started working under the assumption that, two years from now, someone will have no knowledge of what we’ve built.” —Brightstep Partners

“Somebody new comes along, and someone has to explain the whole set up all over again because they can’t afford to pay for documentation during the initial setup. We know more about their setup than they do. Non-profits are a bit less sophisticated in the way they way they’re approaching [knowledge management].” —Give Clarity

Moreover, lack of follow-up and formal surveying of clients inhibits the ability to measure long-term success or failure. For sharing best practices and demonstrating impact, this represents a gap for implementers. When asked about whether they send customer satisfaction or follow-up surveys to clients, implementers responded:

“It’s been our plan that every client gets a survey, every client gets a follow up, but we don’t have the manpower to execute on that right now.” — 501Partners

“We have a follow up after we go live, generally that’s a face to face, we go through a survey. Do we do that a year later? No, we don’t, but we probably should.” — Give Clarity

“We haven’t really done that work internally, in terms of putting hard numbers around what successful adoption is. It would actually be interesting for us a firm to do that and to be able to go back to clients a year or two later, which is when you can really tell what’s happening.” — Brightstep Partners

## From theory to practice

### A checklist for future implementations

We found that most of the topics raised by our research participants and survey responses fell under two major themes: **implementation strategy** and **user adoption** (defined below). These topics echoed the two models (UTAUT and DRG) described above. Although we did not explicitly use these models to conduct our survey and interviews, we found that it was helpful to categorize our findings and analysis according to these two models, in effect providing a “checklist” that we recommend other SIOs can use for their implementations.

The issues raised under implementation strategy can be categorized according to the DRG framework, as the gap between the design of the system and its final implementation (the “reality”) could have been significantly narrowed through a careful application of the model, as is further evidenced in the case studies presented later in the paper. This includes how the organization prepared for, implemented, and rolled out their system.

The issues raised under user adoption can be categorized into components of the UTAUT model that affect BI (behavioral intentions to use). We recommend that any similar SIO looking to adopt the system examine the UTAUT components presented below within the context of their own organization, to try and understand the factors that play a role in driving user adoption. This includes human factors such as training, language, and the staff involved.

**1. Implementation Strategy** refers to the decision-making that took place before the system was implemented. It includes the ITPOSMO dimensions of the DRG model:

- **Information: *Needs assessments*:** Is the system being implemented in order to fulfil a demonstrated need? Who determined what the organizational needs were, and who will be responsible for ensuring that the system can grow to meet changing needs and requirements?
- **Technology:** What are the technology options for a new system? Can an existing system be adapted? Is CCS suitable to meet the needs decided upon under “Information”?
- **Processes: *Feasibility*:** Was a feasibility study conducted to understand whether the system should be implemented? Feasibility includes factors such as budget, timeline, and capacity of the intended user base. Are the technology options feasible within the bounds of these factors?
- **Objectives and values: *Buy-in*:** are the major influencers (for example, team managers) bought into the need for the system and driven to adopt it? If so, are they likely to have an impact on convincing others within the organization of the need for it? Is it designed

with values of transparency and accountability in mind, when in reality the organization functions in a more opaque manner?

- **Staffing and skills:** *Organizational change management:* is implementing the system going to have a big impact on organizational systems and processes? Will the average user have to change the way she conducts her day-to-day work? If so, how will this change be managed, from convincing her of the need for change to ensuring that she has the knowledge and skills to implement it? Do you need to dedicate staff time and skills to changing organization culture as well as training?
- **Management systems and structures:** *Leadership:* Does the organization's leadership believe that the system is necessary for its core work, and are they willing to allocate the necessary resources (such as budget and staff) to make it a success?
- **Other resources:** *Implementation partner:* Does the organization have the capacity to implement the system in-house, or is an external implementation partner necessary? If an external partner is required, has this been factored into the costs and timeline for the project?

**2. User Adoption** refers to the issues that come up once the decision has been taken to implement the system. These include components of the UTAUT model, such as:

- **Performance Expectancy (PE):** *Needs:* Do your intended users express the need for a more efficient system that can help them in their day-to-day work? Do they already believe that using the system would improve their job performance, or do they need to be convinced of it?
- **Effort Expectancy (EE):** *Training:* How will you train people to use the system, and who will be responsible for ensuring that everyone knows how to use the system to its maximum potential? How easy or difficult will it be to train people to use the system? Do people perceive that it will be difficult to use? If you have a fairly young and tech-savvy team, your organization's training requirements and perceptions are likely to differ from an organization that has varying levels of technology familiarity. Given that the system is only as good as the data put into it, the need for extensive and thorough training of users cannot be overemphasized.
- **Facilitating Conditions (FC):**
  - *Staff turnover:* Since this is notoriously high for SIOs, how do you retain internal knowledge about the system? When a vendor knows more about the system than an organization's staff, does this lead to vendor lock-in or create an unsustainable dependency? How will you facilitate continuing successful use of the system as the organization grows and changes?
  - *Documentation:* Very few organizations prioritize documentation for their systems, both in terms of its evolution over time, as well as for training purposes. Good documentation can go a long way encouraging self-sufficiency and setting

- standardized processes for users that makes training significantly easier. Over and over again, not having good documentation came up as something respondents wish they could have done better to facilitate use.
- **Social Influence (SI): *Organizational influencers*:** Who are the major influencers within the organization, and how will having them bought into the system affect overall user adoption? Is the implementation being driven by the organization's leadership, or is it taking a bottom-up approach? How does this affect how likely others are to use the system?

As evidenced in the survey results, implementer interviews, and case studies below, elements of both the UTAUT and DRG models were important in driving successful implementations. We recommend that organizations looking to implement SF explicitly use these models. This up front investment will help replicate some of the successes outlined in this study and mitigate some of the challenges presented by respondents. First, applying the DRG model to organizational implementation strategy will help ensure that expectations are realistically set and that the design of the implementation reflects organizational realities. Second, applying the UTAUT model to user adoption strategies will help ensure that the organization is well-poised for a successful implementation, and that SF system being implemented is actually used, appreciated, and continuously cultivated throughout the user base.

## Case studies

### Sanergy: championing a technology system

#### About Sanergy

[Sanergy](#) builds healthy, prosperous communities by making hygienic sanitation affordable and accessible throughout Africa's informal settlements. It does this by building affordable sanitation facilities; franchising them to local operators; collecting the waste on a daily basis; converting it into organic fertilizer; and then transferring and selling it to Kenyan farms.

Location: Kenya (urban)

Legal structure: Hybrid, founded 2012

Core competency: Sanitation

Tech capacity (self-reported): 6 / 10

Number of employees (globally): >100

Implementation type: Third party consulting firm

Salesforce.com use: CRM, Accounting, Inventory Management

Applications used: FinancialForce, RootStock

Was this project a good investment?: Yes

Would you recommend Salesforce?: Yes

Interviewee: [James Nguyo](#), Manager, IT



**Technology Strategy:** Sanergy's technology strategy is to be able to help its staff get personalized information about each customer, in a manner that allows them to make real-time decisions. For example, a streamlined technology system would allow Sanergy to be able to understand which individuals are frequently late on their loan payments and whether their payment schedule needs to be adjusted; or whether logistics such as toilet usage and waste collection are being managed adequately. On the need to use technology, Nguyo says:

“There's a lot of technology we could push to our support staff to make their work better, and therefore increase the quality of our service”

**Initial intended use for Salesforce platform:** Sanergy initially adopted the Salesforce CRM in 2012 to streamline its sales cycle. Over time, the system was expanded to cover all Sanergy's business functions, including accounting and inventory management. Sanergy chose Salesforce because in addition to Salesforce's discounted licenses program for non-profit, the cloud-based system prevented the need to have servers and infrastructure experts in-house, and local implementation partners with Salesforce expertise were available to help.

**Complexity:** Although Sanergy’s Salesforce system originally started with the CRM to manage the sales cycle, the system quickly grew. Every team at Sanergy now uses the system for its core functions—the Finance and Accounting teams use an additional accounting application called FinancialForce; the engineering and infrastructure teams use the inventory management application RootStock; and the Human Resources team uses the system to manage payroll.

**User Adoption:** Sanergy’s technology team sees itself as having two types of users: internal users, such as the Sanergy sales and operations staff, and external users, such as logistics support teams that handle waste collection. Before implementing Salesforce, Sanergy relied on multiple different formats for its data, such as Google docs and Excel spreadsheets. Given the diverse job functions of its users and the urgent need to move to a more integrated system, driving user adoption was a priority for the Sanergy team. Nguyo defines a successful user as someone who knows how to correctly input data, understand how to retrieve it later, and then be able to make good use of the information that they get:

“Someone who is able to retrieve data, manipulate it, within their role--comfortably, without external help. And then finally, be able to make sense of that information, interrogate it further, and just make sure that it is exists correctly. That for me is a successful user.”

## Successes

**Leadership buy-in:** Considered to be an important component of both the DRG (Management systems and structures; Objectives and values) and UTAUT (Social Influence) models, Sanergy’s leadership was enthusiastic about implementing Salesforce and drove the process forward. Having a director who had technical know-how and an understanding of the importance of the system helped tremendously in prioritizing user adoption for the rest of the team. Of course, senior management buy-in also meant that approvals for the project in terms of budget and staff time were also easier to procure.

**‘Champions’ model:** Sanergy decided to approach the user adoption process by using a “champions” model that covers both the Effort Expectancy and Social Influence components of the UTAUT model by focusing on training conducted by individuals who had a high degree of influence within their teams. The rationale for this was based on an understanding of the wider Sanergy team—according to Nguyo,

“If your laptop is not working, if your audience is the kind of individual who will come to you to ask you what is happening, as opposed to Googling it, then articles—no matter how many you write—are of no use. So for us, I think the champions work better,

because then you have someone who is a go-to, and who you are more comfortable going to, rather than coming down to IT for help.”

The IT team selected one person each from 15 different teams to serve as the IT go-to person. This “champion” was then responsible for internal training for that team. They served as the liaison between the IT team and their own department, helping figure out what the department-specific IT challenges are and how IT can best resolve them. Since the Salesforce system had expanded tremendously, the champions played an instrumental role in communicating their department’s training needs to IT. By holding monthly meetings with the champions, the IT team ensured that communication with each department was clear, and that each month, they could ask: What are the features within the system that you find difficult to use? What can we change?

**Local implementation partner:** Falling into the “Other resources” component of the DRG model, the decision to hire a local implementation partner was critical to Sanergy, both because of the face time it was able to get with the consultant, and because the consultant understood the local context. Since the team originally spent approximately 20 hours a week communicating with the consultant, it was important to them to work with a partner who understood local development sector constraints and could visit Sanergy’s sites to understand its work in detail. This allowed the implementation partner to respond with technology solutions that were appropriate for Sanergy in terms of cost, context, and user base.

## Challenges

**Conducting needs assessments:** One of the challenges that the IT team at Sanergy faced was understanding the requirements of each department, particularly with respect to how these requirements might be bounded by the constraints of their job functions. Understanding the needs of the organization are central to ensuring an effective implementation, from both the DRG (Information) and UTAUT (Performance Expectancy) points of view. For example, for an individual tallying inventory in the warehouse, the IT team might suggest a tablet as a useful alternative to a paper list, since the data can be entered and automatically sync with Sanergy’s inventory management system. However, the reality of taking inventory involves someone climbing up a tall ladder in a warehouse, making it difficult to hold a tablet in one hand. The IT solution in this instance makes his work more challenging, reducing the likelihood that the technology will be adopted. The warehouse staff should ideally be seeking a more efficient alternative (or be easily convinced of the need for one), and this need should be assessed in order to inform the decision to implement a new technology, rather than the other way around.

*Mitigation strategy:* Nguyo suggests that another team outside of IT—such as a Learning and Development team—be responsible for needs assessment, since understanding the “soft”

issues can sometimes be difficult for an IT team that needs to be focus on developing the technology itself:

“I think the challenge with it being an IT function is that we get lost in translation, in that we will always be looking at it from a tech point of view, not a context point of view.”

**Systematization:** Although Sanergy’s users were eager and quick to adopt the Salesforce program, the challenge of driving user adoption was most evident when systems and processes at Sanergy had to be standardized. For example, implementing the Salesforce system meant bringing in user and access rights, which in turn sometimes meant that a task that could previously have been done by one individual suddenly needed to involve several people. This lack of flexibility was often frustrating to users. Facilitating Conditions under the UTAUT model, such as documentation, could have helped users understand why and how certain processes were being replaced by others.

*Mitigation Strategy:* Laying out your organizational systems and processes first, even if only on paper, and testing them with the team in order to train them on any new processes being put in place. Standardization is then already be taken care of once these systems are translated to a technology platform.

## Dasra: for best results, emphasize training and engage staff

### About Dasra

As India's leading strategic philanthropy foundation, [Dasra](#) actively shapes the process of social change by forming powerful partnerships with funders and social enterprises. For the last 15 years, Dasra has been working towards building a 'thriving ecosystem' that enables knowledge creation, capacity building, strategic funding and collaboration in order to touch and transform the lives of 800 million Indians.

Location: India (urban)

Legal structure: Registered Nonprofit, founded 1999

Core competencies: Consulting, professional services

Tech capacity (self-reported): 2 / 10

Number of employees (globally): 50 – 100, expatriate: 1 – 5

Implementation type: Third party consulting firm

Salesforce.com use: CRM, Monitoring and Evaluation

Applications used: Form Assembly

Was this project a good investment?: Yes

Would you recommend Salesforce?: Yes

Interviewee: [Arjav Chakravarti](#), Associate Director, Impact Assessment, Systems, and Operations



### Background

It all started with a clear need for constituent relationship management (CRM) to manage Dasra's diverse stakeholders. As Dasra grew, it needed a centralized and relational database that would provide sophisticated CRM and powerful reporting capabilities. Building off the CRM module, Dasra decided to use the Force.com platform to manage its monitoring and evaluation (M&E) activities. Chakravarti states that:

“Without a backend system, it was just not going to be possible to have consistent and accurate information...without that technology to support everything that goes on, it's very hard to even think of being able to manage [Dasra's] scale-up.”

### Complexity

Off-the-shelf applications and systems for M&E simply do not exist and Salesforce is no exception. Social impact organizations are forced to patch together disparate tools, make

trade-offs on functionality or sophistication, and customize applications heavily to effectively collect and analyze data. Fortunately for Dasra, Salesforce proved powerful, cost-effective, and adaptable enough to meet its M&E needs. However, this came at a significant investment of time, resources, and effort from developers and third-party vendors. Throughout the implementation, Dasra was constantly customizing and working to fine-tune the platform, rather than spending its time on training or use. Having to find that balance is what most social impact organizations struggle with, especially given the novelty or complexity in their work. As the global survey results show, Dasra is not alone in finding Salesforce to be a robust platform that can meet its complex needs, albeit with heavy customization. According to Chakravarti:

“It all had to be built. Part of it, perhaps, is the complexity of what Dasra does, but part of it is also this gap... we were really hoping that Salesforce would just have some of this already that we could just use, but that has not happened...it was a whole new [M&E] solution that had to be designed, thought of, developed, by us and then by the vendor.”

“You do have to customize everything. You literally need to engage a vendor to build everything. We have looked at the AppExchange, but it's not like we found great M&E packages that are there that you can just plug in.”

“The fact that it's quite customizable, that it's a fairly robust system in terms of the database and even the time to access a record or look at things, these basic building blocks of Salesforce are in place that lets you do what you like with it. I think those remain the strengths of the system. As far as M&E is concerned, I don't think there's anything special about it.”

## Challenges

Dasra faced various internal challenges throughout its implementation. Two major challenges were getting buy-in from middle and senior management and defining internal processes simultaneously during the implementation. From the outset, Dasra's senior management played a critically important role in mandating that staff had to use the system, fulfilling the Management systems and structures component of the DRG model. Having initial organizational leadership behind a new system is a significant step that creates an enabling environment for the implementation team, the third-party implementer, and future users. However, as Dasra discovered, this initial mandate needs to be continually reinforced throughout the implementation process, especially because one technical department within the organization was implementing their system and had to convey their experience to other staff. Although the Management systems and structures component was in place, improving upon the Social Influence component of the UTAUT model—by engaging both middle and

senior management—would have led to more successful user adoption. Reflecting back on engaging management, Chakravarti says:

“The implementation occurred in a somewhat organic and bottom-up manner. Had I to do it over, I would have spent more time educating senior and middle management on the importance of the system and brought more people into the system-building process.”

Not effectively engaging stakeholders led to a suboptimal alignment of priorities within staff, which created difficulties in communication requirements to the vendor and ultimately delayed the implementation process. Implementing Salesforce forced Dasra to think deeply through its processes and needs, for better and for worse, before translating them to the vendor. According to Chakravarti, this meant significant changes in business processes, as well as the mapping of existing processes, which led them to have difficult conversations internally, primarily focused around deciding upon the fundamentally important Information aspect of DRG to uncover organizational needs:

“Quite frankly, the greater challenge was not the external, but coming up with what Dasra's needs were, and what our model was, what our indicators were, having that alignment internally first before going to the vendor.”

“We were deciding what fields to have or not, and again, ground up implementation on a lot of things that in retrospect, ideally we shouldn't have had to do. It might have made more sense to pay the vendor more and get it done, or bring in some other consultant who could do it, rather than us figuring it all out ourselves.”

## Successes

Dasra found significant success by prioritizing user adoption, emphasizing training, and fostering a valuable relationship with its third party vendor. A common management tactic that usually leads to strong user adoption is setting the new system or tool as the standard for a staff function. Though it can be painful initially, effectively forcing staff to use it—essentially overcoming Effort Expectancy challenges by linking the technology to Performance Expectancy—creates a critical starting point for organizations to rapidly remove barriers to entry. This creates a high-touch setting that has to be reinforced with a feedback process, allowing users to ease into more complex parts of the system. Chakravarti says:

“The integration with timesheets, I think, was a critical step in that direction. People were using it before but then everyone just HAD to—and in many ways that really just pushed up the adoption and reduced the reluctance all around. Everyone has to do their timesheets on it now.”

“If anyone is doing an implementation, you need your early adopters. You need people who are going to take it on and get it done. There is only so much that someone sitting on the systems or M&E teams can do that's going to do anything. Having said that, it's worth thinking about if somebody had to do it fresh—whether it just makes a lot more sense to invest in that larger team up front. Many times it's just not possible, because no one has seen the value of it, to make that investment—but it may have been useful to just say, ‘we are going to bite the bullet and get a larger, more dedicated team on this early.’”

Naturally, Dasra faced internal resistance. This is directly related to the challenge of getting leadership buy-in, but Dasra was able to overcome this resistance by building confidence within the organization and truly delivering value to staff. Dasra strongly emphasized training and staff involvement to build confidence in the system; survey results show that it dedicated *more than 30 hours* to training (which only 30% of survey respondents reported doing) and dedicated *more than 10 staff* to the project (which only 4% of survey respondents reported doing). According to Chakravarti, building internal support was critical:

“Working extensively with teams, especially the managers, to give them that comfort that this was actually heading somewhere and would not disappear. There were other projects, not MIS, but other sorts of projects, where something would begin and then just stop. And they were like, “well, then why did we invest all that time in it?” So part of it was just giving that confidence that this was here for the long term, this was a fundamental change in the way that Dasra did business. It had to go hand in hand with a very clear mandate.”

To implement its vision, Dasra relied on a strong relationship with a vendor that understood the social impact sector, pushed back effectively when processes were unclear, and was flexible and agile enough to meet the extensive customization and adaptation required of a complex M&E system. Once Dasra’s processes were well defined, it became easier to communicate their needs to the vendor. One of the major success factors that stood out to Chakravarti was that the vendor be familiar with the social impact sector:

“The organization generally was built around working with the social sector and had some amount of sensitivity to what that meant, some of the challenges that people in the sector face, versus a business. I think even now when we work with other vendors, you can sort of see the difference. Some being quite cut-and-dried about things, versus someone who understands the sector a bit better and is willing to take that extra effort to understand, try to figure out solutions, etc. I think that does make a difference.”

## Conclusion

Overall, Dasra had a challenging and complex use for Salesforce but found bright spots of success. Their journey highlights the importance of engaging both internal and external stakeholders to effectively implement and roll out a complex solution. Chakravarti says that:

“The system has proven to be invaluable, not just in terms of access and use of data, but more importantly in the clarity that it has driven in the definition of organizational objectives and business processes.”

“Salesforce is a great system but do not expect an off-the-shelf system that will be trivial to use. It will require going up a significant learning curve. Have the right people in place to drive this - project manager, IT admin and program heads.”

## The Population Council: creating a culture of data efficiency

### About The Population Council

[The Population Council](#) conducts research to address critical health and development issues. Its work allows couples to plan their families and chart their futures. It helps people avoid HIV infection and access life-saving HIV services, and empowers girls to protect themselves and have a say in their own lives. It conducts research and programs in more than 50 countries, and the New York headquarters supports a global network of offices in Africa, Asia, Latin America, and the Middle East. From its beginning, the Council has given voice and visibility to the world's most vulnerable people. It increases awareness of the problems they face and offers evidence-based solutions.

Location: Global; HQ in New York, USA

Legal structure: Registered Nonprofit, founded 1952

Annual Budget: USD 90 million

Core competencies: Health; Gender

Tech capacity (self-reported): 2 / 10

Number of employees (globally): >100

Salesforce Implementation type: Third party consulting firm

Salesforce.com use: Monitoring and Evaluation for Research Study

Applications used: Open Data Kit (ODK), SMS Magic

Was this project a good investment?: Yes

Would you recommend Salesforce?: Yes

Interviewee: [Karen Austrian](#), Associate, Kenya



**Technology Strategy:** The Population Council implemented the Salesforce system for two studies evaluating the impact of asset building programs for adolescent girls – a quasi-experimental study in Kenya (SEAVAG) and a randomized controlled trial in Zambia (Adolescent Girls Empowerment Program (AGEP)). AGEF works with vulnerable adolescent girls in Zambia to help them avoid early marriage; sexually transmitted infections, including HIV; and unintended pregnancy. Managing the constant inflow of monitoring data for an RCT can be challenging, and AGEF's strategy was to build an integrated system that would allow the staff to streamline and manage the RCT.

**Initial intended use for Salesforce platform:** The Salesforce system was implemented to manage monitoring data for the AGEF RCT in a manner that allowed data to be uploaded in real-time so that it could be used to improve program quality. Data that is collected by project staff in the field is directly fed into the system using mobile data collection tools such as Open Data Kit (ODK). SMS Magic was also used to communicate with project beneficiaries. The

project was implemented in 2012 and is expected to continue until the RCT's completion in 2017. According to Austrian,

“We’re really good as a research institution collecting survey data, but when it comes to the actual monitoring data of the interventions that we’re studying, there is a gap. We needed to be able to get monitoring data both of quality that we would trust and also in a timely way so that we could do something useful with it.”

**Complexity:** AGEP’s system required extensive customization, since the Salesforce tool cannot provide for RCT management out-of-the-box. The system also had to be customized to incorporate mobile data collection tools that could feed directly into the database, so that field staff could upload their data in real-time.

**Training:** The AGEP RCT is a large program that encompasses several layers of staff, who all use the Salesforce system on a daily basis. AGEP has field staff at the project sites; four program coordinators who supervise the field staff; program officers who in turn supervise the coordinators; a senior program officer managing the overall intervention and the principal investigator (PI) leading both the study and the intervention. Each layer of staff has different requirements from the system based on their job function, and a key challenge was ensuring appropriate and sufficient training across the board in using Salesforce. Initially, the PI, along with the implementation partner, dedicated approximately 20 hours over 5 days to training staff, after which staff helped train each other on an ongoing basis.

## Successes

**Cost effectiveness:** A common concern for non-profits is that the Salesforce platform is cost prohibitive for them, even with the discounted licenses. However, very few SIOs actually conduct feasibility studies (part of the Processes component under DRG). The AGEP team found that despite the licensing and implementation costs, Salesforce saved them money, as the alternative for them would have been hiring additional people to manually collect and enter monitoring data. The Salesforce platform therefore allowed them to get better quality data for a lower cost.

**Local implementation partner:** The AGEP team highly valued that their implementing partner was locally based, since it meant that they were just a call or a meeting away to help troubleshoot. Austrian says:

“We love the system! It has allowed us to monitor program activity in near to real time and really get a lot of detailed information about program beneficiaries and participation in way that allows us to monitor quality and make improvements. I don’t think we

would've been able to implement as high quality of an intervention as we did without Salesforce.”

## Challenges

**Migrating data:** AGEP transitioned from using a paper-based data collection system and Excel spreadsheets to using mobile tools and the Salesforce platform. In addition to training people in using the new system, they also had to overcome the challenge of uploading old data onto the new platform in a timely manner.

*Mitigation strategy:* The implementation partner helped streamline the system that allowed the AGEP team to load Excel and csv files onto Salesforce. The PI also checked in with her team on a weekly basis to see where they stood when it came to uploading old data for each site—if there wasn't an improvement from one week to the next, the team was able to troubleshoot together and prioritize migrating the old data onto the system. They did also hire additional data entry staff to manually input old data.

**Changing old habits:** Managing the culture shift of how data collection had traditionally been conducted was a particularly challenging aspect for the AGEP team, reflecting the organizational change management challenges mentioned in Staffing and skills under the DRG model. The PI found that often, team members would be tempted to revert to using Excel or paper, since learning the new system was time-consuming and involved a steep learning curve for those less comfortable with technology.

*Mitigation strategy:* Showing people how the system could improve their work had a tremendous impact on convincing people to use it. For example, demonstrating how a simple report could give them information they would have had to spend hours looking for made them realize that having all that program data at their fingertips just makes their work a lot more efficient.

In conclusion, Austrian finds that:

“You don't need to be a data or a research person to use Salesforce. I think overall, it went really well and it was definitely a culture shift for the people who were using it, because they are very used to doing everything in excel, or on paper, or by hand, or one by one. But, because it's so easy to use, very quickly people would have that first experience of “wow, this made my job so much easier!” Then they are sold on using it.”

## JSI R&T: do one thing, do it well

### About JSI Research & Training Institute, Inc.

JSI R&T is a public health organization dedicated to improving the health of individuals and communities throughout the world. For 35 years, JSI has provided high-quality technical and managerial assistance to public health programs worldwide. JSI has implemented projects in 106 countries, and currently operates from eight U.S. and 60 international offices, with more than 500 U.S.-based professionals and 1,600 host country staff.

Location: USA (urban)

Legal structure: Nonprofit (founded 1978)

Core competencies: Health

Annual operating budget: \$100 million +

Tech capacity (self-reported): 5 / 10

Implementation type: Third party consulting firm

Salesforce.com use: Grant management

Unique survey responses: 4

Was Salesforce a good investment?: Yes (4/4)

Would you recommend Salesforce?: Yes (4/4)

Interviewees: Kimberly Farnham Egan, Program Officer, APC Project

Melissa Radke, Finance and Operations Manager, APC Project



### Background

In early 2013, JSI was beginning to implement the grants management piece of the five-year, USAID-funded Advancing Partners & Communities (APC) project. APC supports local non-governmental organizations (NGOs) to implement community programs that seek to improve the overall health of communities and achieve other health-related impacts, especially in relationship to family planning. JSI disbursed grants to applicants from over 30 countries. Project staff needed to track projects, grants, indicators, reports, disbursements, and results. To collaborate with grantees, JSI allocated individual SF licenses so grantees could access SF to report on indicators, submit grant reports, access program documents, and track the progress of their grant. Regional grantee users can also view customized dashboards for their grant, including indicator and target data.

“[APC] grants was going to be a huge undertaking - it takes a lot of paperwork and there’s a lot checkboxes and requirements needed to be compliant with USAID regulations when it comes to grants and issuing funding.”

## Simplicity and clarity

While the amount of business processes and complexity of managing a large grants program can be substantial, the APC implementation was solely focused on building a powerful grants database. The core team was driven by the necessity to automate various pieces of the grant management process and improve their interaction with grantee users in countries around the world. The team was committed to not doing things the old way. Complicated excel sheets, using email as the primary method of communication, and keeping track with pen and paper was exactly what APC wanted to avoid. One person on the team had experience using a platform like SF and the APC team was in prime position to try something new.

“We have 91 grants, so when you’re dealing with that volume, [Salesforce] is extremely helpful. For those that are in the system on a regular basis, everyone would say it’s extremely helpful.”

JSI did well to internally establish the exact requirements for their Salesforce system in a very clear and collaborative way. While working with the vendor, the APC team made sure to discuss the requirements in depth and work towards a team decision on exactly what they wanted their system to do, and, more importantly, not do. They remained disciplined in focusing on the core grants database without getting sidetracked by the bells and whistles or additional functionality that the powerful Salesforce platform can provide. JSI recommends:

“Have a very clear picture of exactly what you need the system to do and make sure everyone has the same understanding. Ensure all staff that will be using the tool are represented in initial conversations and throughout the building process.”

## Getting donor buy-in

As a USAID-funded cooperative agreement, the APC team needed to get the approval and costing process right for their donor. They did their research and bidding process, and were excited to propose SF as their technology solution. Fortunately, USAID was amenable to innovative solutions and wanted to implement a system that would make JSI’s work easier. Ultimately, JSI went above and beyond to provide independent access to their grants database to USAID, which was a valuable way to get initial buy-in and valuable collaboration throughout the life of the cooperative agreement. With their own login, USAID evaluators and program managers could go in at any time and view grants by region, how much had been disbursed and to whom, and see how well grantees were reporting on indicators and reaching targets.

“One of the great things was that the system created dashboards based on the data from grantees submitted. That was something that USAID loved. We actually created accounts for them, so they could go in and look at the dashboard and quickly see how much money

each of our grantees had spent, how much we had as a whole on grantees, the distribution of what countries grantees were working in, etc. That was definitely a big hit with the client and therefore, a big hit with us. That was fantastic.”

## User adoption and training

Salesforce was a completely new platform to all but one person on the APC team. The platform was also new to all grantees and regional users, coupled with a new, digital way of reporting and managing compliance. With traditional email-based communications and reminders, reports and tasks ultimately fall through the cracks and are cumbersome to organize. JSI prioritized user adoption by directing grantee users to the system when they had any questions, information requests, or needed to upload documents. They hoped this high-touch approach would allow users to associate value with the system as a one-stop shop for all their grant needs, moving them away from email submissions and individual document sharing. As highlighted in the UTAUT, Performance Expectancy (PE) and Facilitating Conditions (FC) played critical roles in grantee users to adopting the system.

“Grantees are used to doing everything on paper and over email. They were concerned that Salesforce was going to be something extra for them to handle and that they weren’t going to be able to use it or that it was going to be difficult. But, we listened to those concerns and we addressed them. We made it clear that wasn’t going to be an issue and that we would work with them as long as it took to make sure they were comfortable in using the system.”

JSI relied on the system to improve their ability to communicate with and provide support to regional grantee users. All M&E, financial, and programmatic reporting that users had to do throughout the life of their grant was now automatically pre-scheduled in the system by APC staff. Salesforce could then use simple date-based workflow and email reminders to send the grantee a reminder two weeks before it was due, a week before it was due, and the day it was due. If this information was not submitted, they would get a big, red notification. The APC found this to be time saving in terms of scheduling milestones and helpful to keep grantees on track. The team continually reinforced this new way of doing things with every grantee to accelerate change management and drive user adoption.

“When a grantee would email us their report, we would say ‘thank you for submitting this, it looks great. Can you please also upload it to the grants database (Salesforce) because then we have a record.’ So it took time, and a lot of positive reinforcement.”

“We made sure to help grantees keep up well since we knew we were going to be working with some organizations who’d never done this before. It was really all about making it the same process every time and making the process as simple as possible.”

Prioritizing written documentation proved to be a valuable strategy for JSI to quickly train both new staff and new grantee users. From the survey results, their prioritization of written documentation was 9/10, compared to a mean of 4/10 among all survey respondents. When new grantee users were given access to the system, JSI could quickly provide the system documentation and training manual to onboard them. Their training approach was also targeted and spread out with mini-trainings to avoid system fatigue. They were also able to keep training costs low by conducting all training remotely.

“Holding multiple short training sessions was especially helpful for staff that had no experience with Salesforce, as it avoided information overload. I highly recommend creating a users guide or training manual to introduce users to Salesforce.”

“We were a new project setting up our first database. Training was needed to help users in the office and our new grantees to use the grants database, but we had anticipated and prepared for the training and troubleshooting to help everyone understand how to use the new system.”

Overall, the system provided direct value and carrots to a variety of stakeholders, including USAID, the APC staff, and grantee users. The inclusive implementation strategy involved stakeholders at the right time to understand exactly how they needed to optimize the grants database. To handle change management and increase user adoption, JSI provided the right sticks to ensure data was flowing directly into SF, that the system was tied to performance, and that the system represented a substantial part of users day-to-day work.

“Salesforce was a great solution for us and saves us time and resources in managing our grantee data, financials, program indicators, and reporting. Our grant management staff find this resource to be extremely valuable and we are able to quickly manage and respond to our grantees and USAID clients.”

“Salesforce is definitely seen as a tool that we couldn’t operate without. It’s seen as a central part of our grants management system. Our grants managements system has done really well. It’s well received at USAID and we’re really proud of it. I think that [Salesforce] is a big part of that.”

## Limitations and further research

Our biggest takeaway from this study was how much untapped potential there is--for future in-depth research about how SIOs are using CCs; for technology providers and implementing partners to seek new markets; and for SIOs to understand and uncover the vast array of solutions that CCS can offer them. However, it is important to caveat these conclusions with some of the limitations that our study faced:

- **The danger of a “single story”<sup>40</sup>.** A majority of our sample used the same implementation partner. Snowball sampling naturally led us to participants that shared a professional network and were likely to have recommended the vendor to one another; but more importantly, we found that this vendor was the only one with offices based internationally and specifically marketed to SIOs in developing countries, and is effectively the only such player in this niche segment.
- **Salesforce  $\neq$  implementation partner.** For a lot of our participants, the jump to using Salesforce was a major one since it entailed going from fairly basic technologies (typically spreadsheet software such as Excel) to using CCS. Given the lack of familiarity with the system, it is possible that our sample has a tendency to conflate Salesforce with the implementation partner—i.e., it was difficult for them to distinguish their experience with Salesforce from their specific experience with their implementation partner. With the highly customized nature of the systems of most of our participants, differentiating the two becomes even more complex as the utility and effectiveness of Salesforce is difficult to disentangle from custom applications built on the Force.com platform by the vendor.
- **Small sample sizes.** Although it is difficult to find definitive numbers, the total universe of SIOs using Salesforce outside of the US and Europe is small, making it challenging to conduct large-N studies. Our research is strictly exploratory, but there is great value in building upon this study as the use of SF for SIOs takes off internationally.

---

<sup>40</sup> Hat tip to Chimamanda Ngozi Adiche’s 2009 TED Talk for inspiring the subtitle.

## Annex

### Annex 1: User adoption models for technology

Models and Theories	Constructs
Theory of Reasoned Action (TRA) by Fishbein and Ajzen (1975) derives from psychology to measure behavioral intention and performance.	Attitude Subjective norm
<p>Technology Acceptance Model (TAM) by Davis (1989) develops new scale with two specific variables to determine user acceptance of technology.</p> <p>Technology Acceptance Model 2 (TAM2) by Venkatesh and Davis (2000) is adapted from TAM and includes more variables.</p>	Perceived Usefulness Perceived Ease of Use Subjective Norm* Experience* Voluntariness* Image* Job Relevance* Output Quality* Result Demonstrability* <i>* indicates TAM2 only</i>
Motivational Model (MM) also stems from psychology to explain behavior. Davis et al. (1992) applies this model to the technology adoption and use.	Extrinsic Motivation Intrinsic Motivation
Theory of Planned Behavior (TPB) by Ajzen (1991) extends TRA by including one more variable to determine intention and behavior.	Attitude Subjective norm Perceived Behavioral Control
Combined TAM and TPB (C-TAM-TPB) by Taylor and Todd (1995).	Perceived Usefulness Perceived Ease of Use Attitude Subjective norm Perceived Behavioral Control
Model of PC Utilization (MPCU) by Thompson et al. (1991) is adjusted from the theory of attitudes and behavior by Triandis (1980) to predict PC usage behavior.	Social Factors Affect Perceived Consequences (Complexity, Job-Fit, Long-Term Consequences of Use) Facilitating Conditions Habits

<p>Innovation Diffusion Theory (IDT) by Rogers (1962) is adapted to information systems innovations by Moore and Benbasat (1991). Five attributes from Rogers' model and two additional constructs are identified.</p>	<p>Relative Advantage*  Compatibility*  Complexity*  Observability*  Triability*  Image  Voluntariness of Use  <i>* indicates Roger's constructs.</i></p>
<p>Social Cognitive Theory (SCT) by Bandura (1986) is applied to information systems by Compeau and Higgins (1995) to determine the usage.</p>	<p>Encouragement by Others  Others' Use  Support  Self-Efficacy  Performance Outcome Expectations  Personal Outcome Expectations  Affect  Anxiety</p>
<p>Unified Theory of Acceptance and Use of Technology Model (UTAUT) by Venkatesh et al. (2003) integrates above theories and models to measure user intention and usage on technology</p>	<p>Performance Expectancy  Effort Expectancy  Attitude toward Using Technology  Social Influence  Facilitating Conditions  Self-Efficacy  Anxiety</p>

## *Annex 2: Global survey instrument*

1 Name of your organization

2 Year founded

3 In which country is your organization incorporated?

4 What is your organizations legal structure?

- Registered charity/non-profit
- B-corp
- C-corp
- Hybrid
- Government agency
- University/Higher-education
- Other \_\_\_\_\_

5 Annual operating budget (estimated in USD)

6 Number of offices (globally)

7 Number of employees (globally)

- 1 - 5
- 10 - 20
- 20 - 50
- 50 - 100
- More than 100

8 Approximate number of expatriate or third-country national employees

- 1 - 5
- 10 - 20
- 20 - 50
- 50 - 100
- More than 100

9 Approximate number of national employees (citizens of country where your office is located)

- 1 - 5
- 10 - 20
- 20 - 50
- 50 - 100
- More than 100

10 Primary spoken language

- English
- French
- Spanish
- Portuguese
- Hindi
- Marathi
- Swahili
- Kinyarwanda
- Other

11 Describe your office type.

- Headquarters
- Regional
- In-country
- Other \_\_\_\_\_

12 Describe your location type.

- Rural
- Urban

13 Core competencies of your organization

- Agriculture
- Education
- Health
- WASH
- Access to finance/micro-credit/micro-finance
- Transportation
- Supply Chain
- Gender
- Livelihoods
- Consulting or professional services
- Other \_\_\_\_\_

14 Which cloud computing services/platforms did you consider for your implementation?

- Salesforce/Force.com
- Amazon Web Services
- Microsoft Azure or 365
- Google App Engine
- Other \_\_\_\_\_

15 Please provide a brief description of why you chose Salesforce/Force.com

16 How did you first hear about Salesforce/Force.com?

- Salesforce Website
- Another organization
- Marketing campaign
- Friend or Colleague
- Other

17 Please describe "Other"

18 What did you initially intend as the main use of this platform?

- Donor management
- Event management
- Grant management
- Collecting field data
- Case management
- Finance, Human Resources or Accounting
- Monitoring and evaluation
- Mobile data collection
- Supply chain
- Sales/Customer service
- Other

19 Please describe "Other"

20 Did you conduct an internal feasibility study?

- Yes
- No
- Do not know

21 Did you conduct a feasibility study with an external partner?

- Yes
- No
- Do not know

22 Did you conduct a readiness program?

- Yes
- No
- Do not know

23 Please rate your organization's technology capacity/familiarity prior to implementation.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

24 Please rate your organizations anticipated level of effort prior to implementation.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

25 What were the anticipated project/implementation costs (USD)?

- 0 - \$1,000
- \$1,000 - \$5,000
- \$5,000 - \$10,000
- \$10,000 - \$20,000
- \$20,000 - \$50,000
- \$50,000 +

26 What was the anticipated timeline for this project?

- 1 month
- 2 months
- 3 months
- 4 months
- 5 months
- More than 5 months

27 How did you implement this project?

- In-house
- Third-party contractor/consultant
- Hybrid (of two listed above)
- Other \_\_\_\_\_

28 Did you go through the Salesforce Power of Us Program?

- Yes
- No
- Do not know

29 Did you go through the Salesforce Quickstart Program?

- Yes
- No
- Do not know

30 How did your Salesforce system start?

- Used the Non-profit Starter Pack (NPSP)
- Used a 'Clean Slate' (standard Enterprise Edition)
- Built off an existing Salesforce/Force.com system
- Do not know

31 How would you rate your experience with the NPSP?

	Agree	Neither Agree nor Disagree	Disagree	I don't know
The NPSP served my purposes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPSP was limiting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPSP provided useful tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPSP was confusing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The NPSP required extensive customization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

32 Approximately how many internal staff were involved with this project?

- 1 - 2
- 3 - 5
- 6 - 8
- 9 - 10
- More than 10

33 Approximately how many outside consultants or contractors were involved with this project?

- 1 - 2
- 3 - 5
- 6 - 8
- 9 - 10
- More than 10

34 Approximately how many hours, per week, were spent communicating with the implementer?

- 1 - 2
- 3 - 5
- 5 - 10
- 10 - 20
- More than 20 hours

35 What were the primary methods of communication with the implementer?

- Skype/web-conference
- In-person
- Email
- Phone
- Other \_\_\_\_\_

36 What language was used as the primary communication with the implementer?

- English
- French
- Spanish
- Portuguese
- Hindi
- Marathi
- Kiswahili
- Kinyarwanda
- Other

37 Were you implementing a third-party application or tool (i.e. a mobile tool or a web form) as part of this project?

- Yes
- No
- Do not know

38 Please describe the third-party application(s) or tool(s)

39 Was this project intended for office users, field users or both?

- Office users
- Field users
- Both

40 How would you rate Salesforce/Force.com as a platform throughout the implementation phase?

	Agree	Neither Agree or Disagree	Disagree	I don't know
The platform was flexible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The platform was robust	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The platform required extensive customization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, customization required a high level of effort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The platform worked well with other tools/applications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

41 Were you rolling out the Salesforce/Force.com training at the same time as the third-party application or tool?

- Yes
- No

42 As a result of the new system, did you face internal challenges regarding change management?

- Yes
- No
- Do not know

43 Please describe some of these challenges

44 As a result of the new system, did you face internal challenges regarding knowledge or technology transfer?

- Yes
- No
- Do not know

45 Please describe some of these challenges

46 As a result of the new system, did you face internal challenges regarding transparency or accountability?

- Yes
- No
- Do not know

47 Please describe some of these challenges

48 As a result of the new system, did you face internal challenges regarding human resources?

- Yes
- No
- Do not know

49 Please describe some of these challenges

50 Approximately how many total hours did the internal project team dedicate to internal user adoption and training?

- 1 - 5
- 5 - 10
- 10 - 20
- 20 - 30
- More than 30

51 Approximately how many internal users were involved in user adoption and training?

- 1 - 5
- 5 - 10
- 10 - 15
- 20 - 25
- More than 25

52 Please describe the involvement of field users in trainings.

- Involved in all trainings
- Involved in some trainings
- Not involved

53 Please indicate the format(s) for trainings.

- Skype/web-conference
- In-person
- Email
- Phone
- Video

54 Were trainings done in multiple languages?

- Yes
- No
- Do not know

55 Did you use any external tools or applications specifically for training?

- Yes
- No
- Do not know

56 Please describe some the tools or applications used.

57 How many months ago did this project launch?

- 1 - 3
- 3 - 6
- 6 - 12
- 12 - 18
- 18 - 24
- 24 - 48
- More than 48 months ago

58 Please indicate the level of priority for written system documentation (i.e., how-to guides, training manuals, etc.) during implementation.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

59 Please indicate the level of priority for video system documentation (i.e., how-to guides, training manuals, etc.) during implementation.

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

## 60 Please indicate current system usage

	Agree	Neither Agree nor Disagree	Disagree	I don't know
The system is active	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The system is being used as intended	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The system is being used differently than intended	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The system is meeting our needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The project took longer than expected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The internal level of effort was as expected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The project cost was as expected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The system saves users time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 61 Approximately how many active users does the system have?

- 1 - 5
- 5 - 10
- 10 - 20
- 20 - 50
- 50 - 100
- More than 100
- Do not know

## 62 Have you calculated or estimated the returns on this investment?

- Yes
- No
- Do not know

## 63 Do you believe this project was a good investment?

- Yes
- No
- Do not know

64 Please provide any further comments regarding your Salesforce/Force.com system.

65 Please provide any further comments regarding the implementation process of this system.

66 Overall, would you recommend Salesforce/Force.com to other social impact organizations?

- Yes
- No
- Do not know

67 Please provide your top 3 suggestions you might have for other organizations implementing a Salesforce/Force.com system.

### *Annex 3: Interview instrument (for SIO respondents)*

#### Checklist:

---

- Introductions
- Explanation of research and purpose
- Explanation of consent form
- 15 minutes allocated to review of consent form and answering any questions
- Consent form signed

Interviews will be audio- or videotaped.

Interviews will be semi-structured around a list of questions below. The questions listed below are representative of the ones we will ask, but we expect other questions to emerge during the course of the interviews.

All participants will have already taken the online survey. Survey responses will be referenced during the interview.

#### Introductory questions

---

- Tell me a little about your work and role at your organization?
- What do you like most about working here?

#### Organizational questions

---

- What would you say are some challenges your organization faces?
- What are the main focus areas/core competencies of your organization?
- Do you think that your organization's work requires technology solutions to be effective?
- How would you describe your organization's level of technology capacity/familiarity?

#### Sourcing and pre-implementation questions

---

- Why did your organization decide that you needed to implement a technology solution for your work? How was the idea introduced?
  - How does a cloud computing solution help to solve your challenges?
  - What aspect of your work in particular did you feel would benefit most from this type of system?
- If you required the system in order to roll out a specific application/tool, can you tell me more about that tool?
- [If your organization conducted a feasibility study]: Can you tell me more about the feasibility study? What were some of the findings?
- Did you see demo Salesforce systems?
- Once it was decided that a system was needed, how did your organization go about deciding which one to use? Can you walk me through the decision-making process?
- What made your organization decide to go with Salesforce? What features convinced your organization that it was the right choice at the time?
- Did your organization have apprehensions or concerns about using Salesforce? If so, how did you plan to overcome them?

- How did cost of the system feature in your organization's decision-making?
- [If non-profit]: Did your donors play a role in any of the decision-making regarding the system? If so, could you tell me more about that? What were some of their thoughts about the need for the system?
- How long did you anticipate that it would take to get the system up and running? What factors influenced this timeline? [Guiding examples: digitized data already available; in-house expertise available; alternatively, lack of experience with the system]

If implemented as an M&E tool:

- Why did your organization want a cloud-based M&E tool?
- Can you briefly tell me about X's M&E processes and systems? What level of M&E do you do?
- Did your relationship with donors/investors influence this decision? How?
- How did the implementation team and the M&E interact? Who made decisions about the Salesforce system?
- What features of Salesforce were most useful for M&E?
- What features of Salesforce posed a challenge for M&E?

Implementation questions

---

If implemented in-house

- What made your organization decide to implement the system in-house?
- Did you have to hire the necessary talent in order to implement it? If so, was this a part time or full time hire?
- What was the role and level of the lead on the implementation? Who did they report to?
- Can you walk me through the project teams reporting structure?
- Who made the major decisions regarding the project, for example the timeline, budget, plan for rollout? Were there major milestones you were working towards?
- Was the project team that worked on the implementation interdisciplinary?
- Can you walk me through their relationship with other teams who would be using the system? How closely did they have to work together?
- What resources specific to Salesforce were available to the implementation team--for example, online forums, specialized classes, access to Salesforce.com/foundation staff, local developer groups?
- What were the three biggest challenges faced by the implementing team?
- Why do you think these challenges existed?
- What were the three biggest 'success' moments, for example, a particularly difficult customization was completed, or a major milestone achieved?
- How easy or difficult did you find it to implement Salesforce generally? Why?
- In retrospect, what would your organization have done differently regarding the implementation?

If implemented with a contractor/partner

- Can you walk me through your organization's process of selecting an implementation partner?
- How did your budget and timeline for the project change after conversations with the partner?
- Broadly, what made you select this partner? [Guiding examples: local expertise, subject area knowledge, personal relationship, had worked with them before]

- Who was the lead person at your organization that was responsible for liaising with the partner? What is their role and level within the organization?
- Were they the only person who liaised with the partner, or did the partner communicate with all teams involved in the project?
- How difficult or easy was it for them to communicate the needs of your organization to the implementing partner?
- What were the some of the benefits and challenges of having a third party contractor/consultant?

#### If hybrid

- Which aspects of your organization's implementation were handled in-house, and which were implemented with a partner? Why?
- [Based on response, blend questions from previous sections] There's a lot here!

#### Adoption and Training questions

---

- Who uses your organization's Salesforce system on a daily basis?
- Can you tell me about the training process for them? [Guiding examples: how often were trainings held; how were trainings structured; who was present]
- Did your implementing partner help with training? How?
- Who was in charge of ensuring that people were trained?
- Do you believe, now, that internal capacity building led to a successful implementation?
- Did your organization's leadership play a role in the adoption, rollout, and training process? How?
- How easy or difficult do you feel it was to train people?
- Did you face resistance? If so, can you tell me more about this? Why were people resistant to the system? How did you overcome this resistance?
- What do you think is the general perception of the Salesforce system today at your organization?
- What were the three biggest challenges you faced during the adoption and training process?

#### Support and Sustainability questions

---

- What resources were and are available to your organization's Salesforce users?
- Did you do any documentation during this phase, such as manuals, videos, or guides for training? If so, how were these received? If not, did you wish you had?
- How is your system used now? [Guiding examples: every day; occasionally; only by specific teams;DOA]
- What is your relationship with your implementation partner today?
- How would you describe your organization's level of technology capacity today?
- Did any internal technology superstars emerge from this implementation?
- Think back to the very beginning of the project, when it was still an idea. Knowing what you do now, what would you have done differently? Why?
- Are you happy with your Salesforce system? Do you think it was worth the resources you invested in it? Why or why not?
- Did you find that solutions that were once not available became available over time?

- Overall, did you face any challenges that it was difficult to find support for outside of your organization? For example, specific customization unique to your organization? How did you overcome these?
- What do you believe Salesforce as a company could do to help organizations like yours implement the system?
- Have you shared your experiences with Salesforce with other similar organizations, for example through events, workshops, or online forums? If so, please tell me more about that.
- What do you think of Salesforce's discounted licensing program for non-profits?
- Have you had any interaction with Salesforce Inc. or the Salesforce Foundation regarding your implementation?

Open Discussion and Comments

## *Annex 4: Interview instrument (for implementers)*

### Checklist

---

- Introductions
- Explanation of research and purpose
- Explanation of consent form
- 10 minutes allocated to review of consent form and answering any questions
- Consent form signed

Interviews will be audio taped for transcription purposes. Interviews will be semi-structured around the list of questions below. The questions listed below are representative of the ones we will ask, but we expect other questions to emerge during the course of the interviews.

### Questions

---

- How many of your clients ask for Salesforce specifically versus recommending it?
- Is Salesforce usually a stand alone system or is it powering third party applications?
- Are you developing or creating apps to meet specific clients need / to meet industry needs as a stand alone product (Appexchange)?
- Within client organizations, what kinds of roles are you talking to during the initial conversations? i.e. Leadership team, IT, Monitoring and Evaluation (M&E), etc.
- Can you describe a typical client (system purpose, size, location, project length, etc.)?
  - How do Salesforce systems break down within your project portfolio? i.e. CRM, M&E, Fundraising, Event Management, etc.
  - To what extent is pricing of and total project cost a deal breaker for nonprofits?
- Do you see an increasing need for customization within client requirements?
- How many of your clients are using the NPSP?
- What do you consider a successful Salesforce implementation?
  - Do you have KPIs that measure the success of your system?
  - If so, do you measure specific themes such as leadership, user adoption or sustainability?
- What do you consider a failed Salesforce implementation?
- Do you send out surveys to your clients? How do you keep a pulse on the status of the system post-implementation?
  - Do you typically follow up with clients a year or two after the project closes?
- Specifically for nonprofits, what do you see as the strengths and weaknesses of Salesforce?
- Where would a typical client say Salesforce is strong or weak?
- What are some brick walls that your clients hit in terms of functionality?

### Wrap-Up

---

- What platforms and tools are you seeing that clients are using instead of Salesforce?
- What do your clients or consultants wish that Salesforce could do to specifically meet the needs of nonprofits?
- Where do you see untapped potential within Salesforce use for nonprofits?