

The Future of Nonprofit Marketing

Preparing for AI

June 8th, 2023



Forward Looking Statements

The Salesforce logo, which consists of the word "salesforce" in a white, lowercase, sans-serif font, enclosed within a blue cloud-like shape.

This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired organisations. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain security levels and service performance meeting the expectations of our supporters, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau Software, Inc. and Slack Technologies, Inc., and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, including our July 2021 acquisition of Slack Technologies, Inc., and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or work-from-home policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded organisations within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of the transfer and the value of such transferred intellectual property; uncertainties regarding the effect of general economic and market conditions; the impact of geopolitical events; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; the ability to execute our Share Repurchase Program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives.



Meet the Team

Salesforce for Nonprofits



Patrick Frank

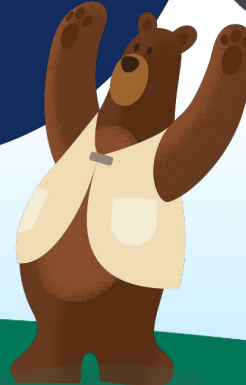
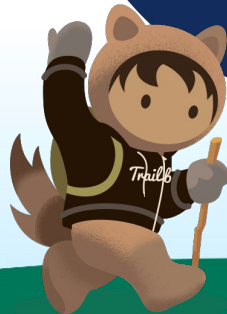
Marketing Cloud Director
Salesforce For Nonprofits, EMEA



Andrea Goezinne

Senior Product
Marketing Manager

Thank
you



Poll: Have you tried ChatGPT or other AI?

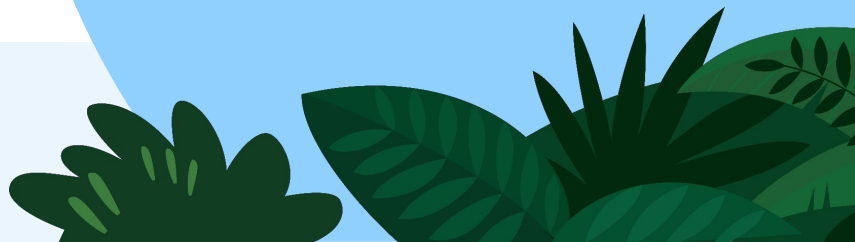
salesforce



A. Just for personal use cases

B. Use ChatGPT, Bard and/or others

C. Not yet



Poll: where is your organisation looking at AI to create solutions?

salesforce



A. How do I drive growth with greater efficiency (AI CRM)?

B. Better journeys: How do I acquire and retain supporters?

C. How do I write correct copy for grants / emails / campaigning and even program work



AI + Data = Impact



AI will change our lives...

What does that mean for Nonprofits?



100M

ChatGPT users, growing faster than any app or social network



30%

Of surveyed nonprofits are actively experimenting

50%

Of surveyed charities are researching AI

AI will change our lives...

What does that mean for Nonprofits?

salesforce



Efficiency

Making your life
easier.



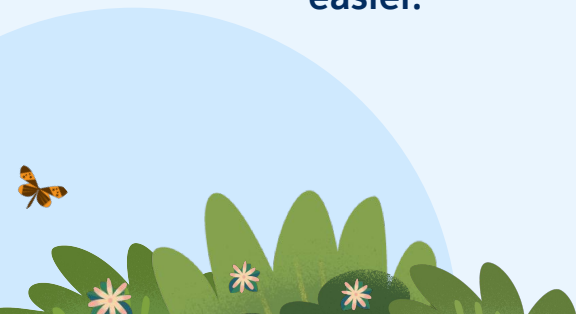
Data

Delivering a better
experience with
big data



Impact

Unlocking the path
to greater levels of
impact than ever
before

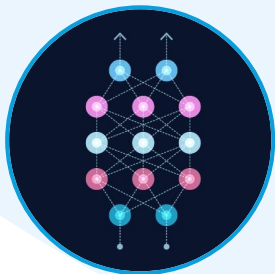


So what is the difference between Generative and Predictive ?



What is Generative AI?

AI of the Past



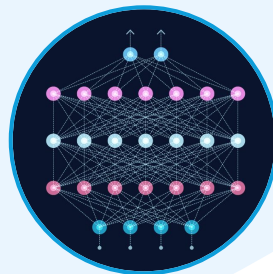
Millions of parameters

Classification

Prediction &
Recommendation

Image & Text Recognition

AI of the Future



Billions of parameters

Pre-trained data

Understanding relationships
between data

Creating content (text, image,
video, sound, and more)

salesforce

What is a practical example of how nonprofits have successfully used AI in improving supporter experiences and streamlining donor journeys?



Campaign Performance

You are observing a drop in the conversion rates of your campaigns.

You are worried about the drop of engagement for STEPS existing contacts and the overall marketing spend.



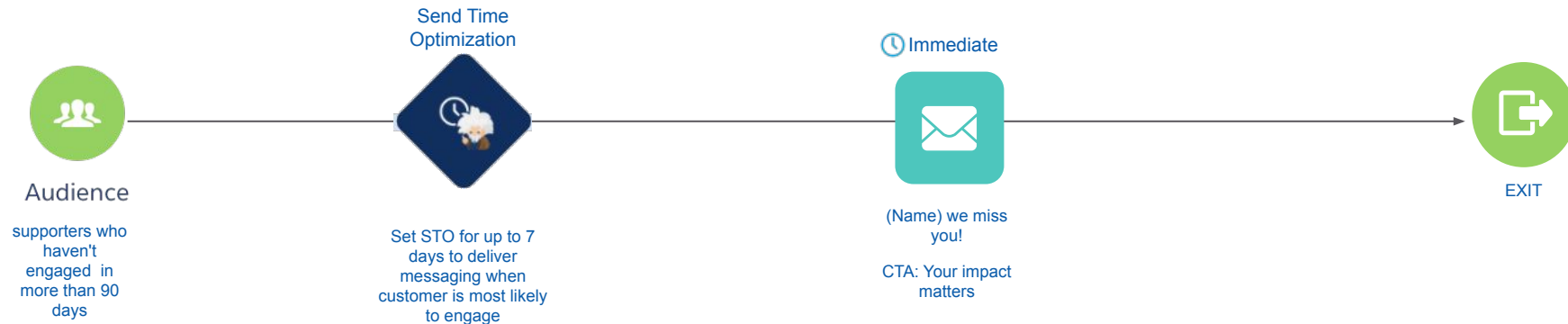
DONATIONS



LAPSED
DONORS

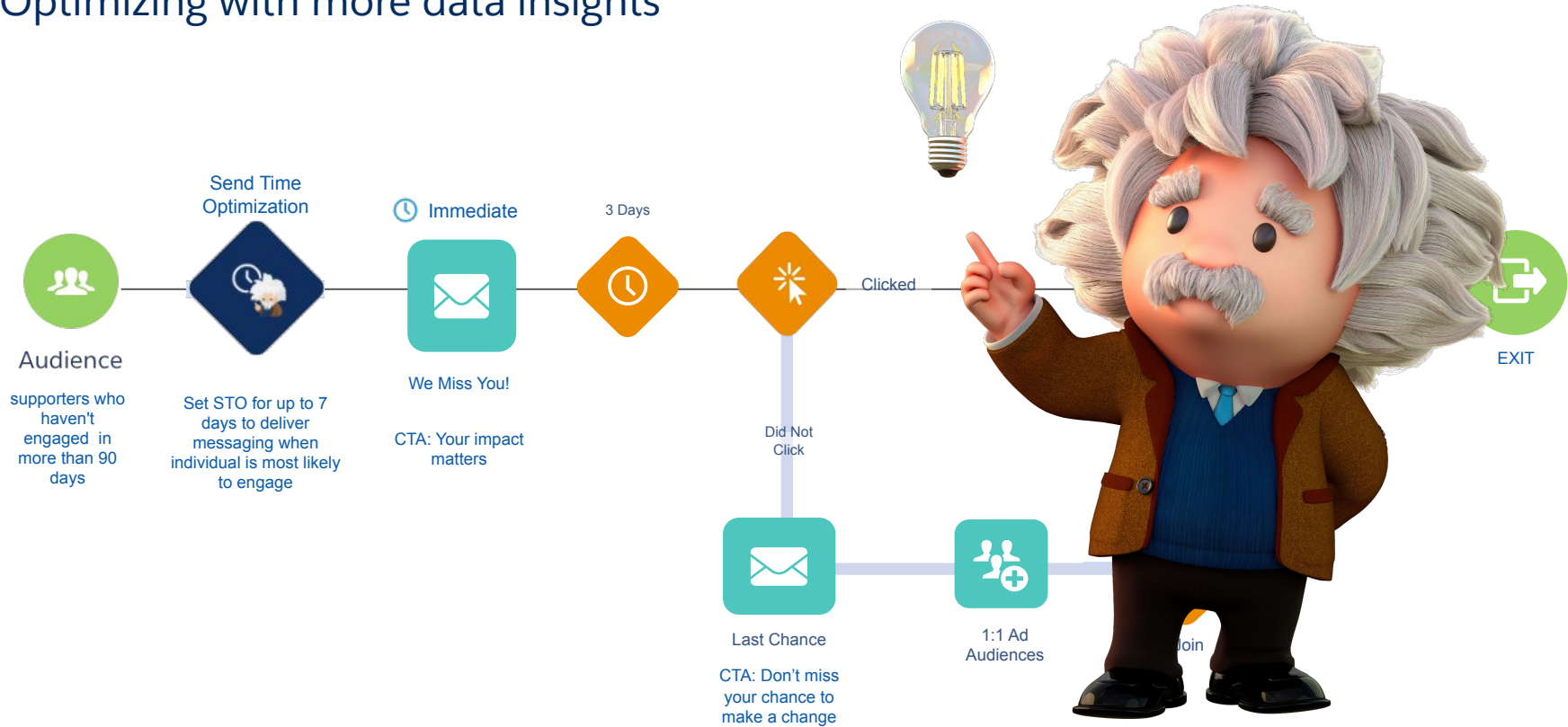
Sample Re-engagement Journey

Emerging: start simply, lay a foundation



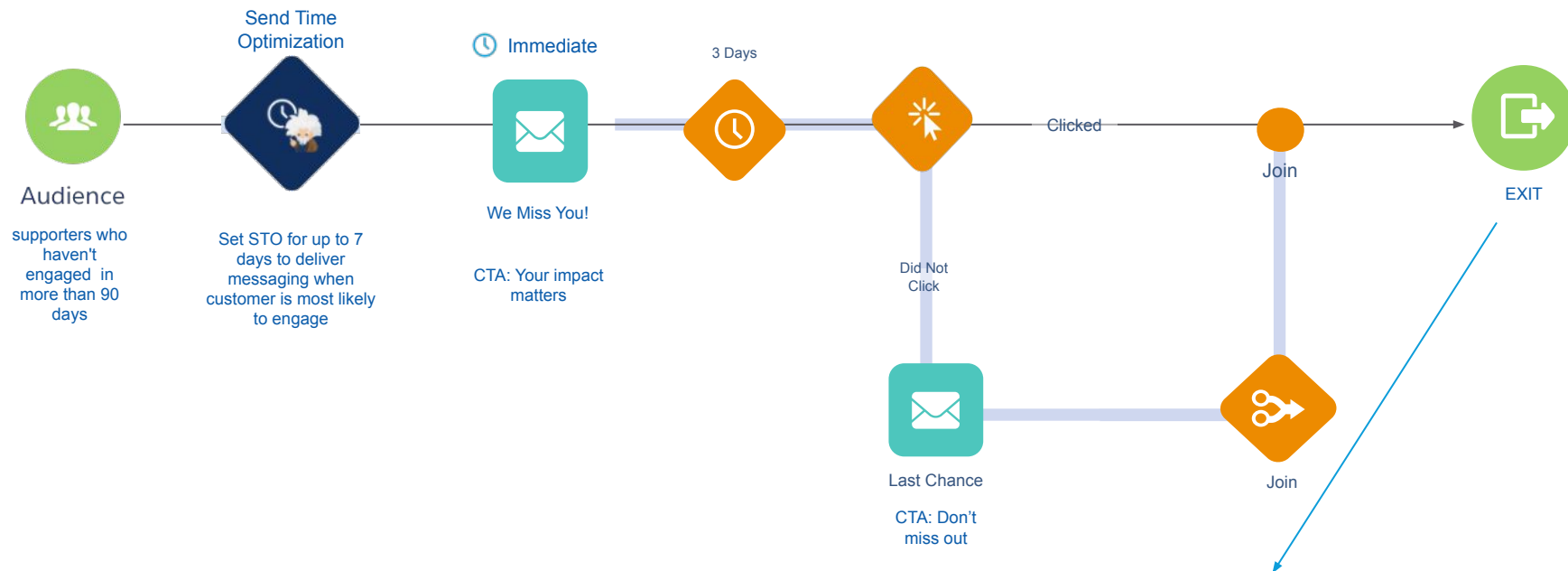
But what if we had more data?

Optimizing with more data insights



Sample Re-engagement Journey

Performing: test, iterate, extend



Journey Goal: 25% of unengaged supporters engage within 14 days.



After 14 Days: Review Journey History & Engagement Metrics to strategize & iterate.

**What would that experience look like with
ALL DATA connected?**



You need the full 360

Known Data Sources IRL



Segmentation 1 looks inactive:

- ..who have opted-in on marketing communication
- ..that have made a donation more than 6 months ago but no longer than 2 years ago;
- ..the average donation amount greater than £30;
- ..haven't been active in the last 90 days
- ..proximity to cause high

Segmentation 1+2 some not inactive at all:

- *..has visited the website at least once in the last two weeks;*
- *..has either purchased on the shop or own a crowdfunding page*
- *..or participated to an event (volunteering or fundraising event)*
- *..have called donor care service, volunteer team or other services of your organisation*



Campaign Performance

You are observing a drop in the conversion rates of your campaigns.

You are worried about the drop of engagement for STEPS existing contacts and the overall marketing spend.

She decides, she wants to focus on reactivating existing supports and run a campaign called "**STEP INTO**"

Datorama Analytics

CDP Segment Journey Performance (A)

Jun 19, 2022 - Sep 17, 2022



CDP Segment Journey Performance

Insights & Analysis for cross-channel Journeys from CDP segments.

Marketing Cloud
✓ Last Updated Apr 25 **Data Lake**
✓ Last Updated Apr 25 **Google Analytics**
✓ Last Updated Apr 25 **Sales Data**
✓ Last Updated Apr 25 **TotalConnect**
✓ Last Updated Apr 25 **Personalization**
✓ Last Updated Apr 25 **CDP**
✓ Last Updated Apr 25

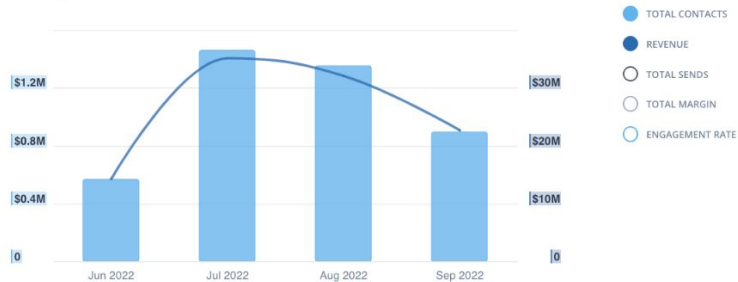
Switch Date

Day Week Month Quarter Year

Top KPIs & Goals

Total Contacts	4.3M of 5.2M	<div><div></div></div>	83%
Revenue	\$104.1M of \$144.6M	<div><div></div></div>	72%
Total Sends	201.7M of 252.1M	<div><div></div></div>	80%
Total Margin	\$17.3M of \$19.8M	<div><div></div></div>	87%

Trending Performance



CDP Segment Journey Performance (B)

Jun 19, 2022 - Sep 17, 2022



Segment
STEPS - TestSegment On
Einstein_MC_Predictive_ScoresPublish Schedule
Don't refresh[Edit Properties](#)[Done](#)

Attributes Segments

Q Search Attributes

⋮	Last Modified Date	📅
⋮	Last Name	^_
⋮	STEPS Loyalty Enrollment Channel	^_
⋮	STEPS Loyalty Enrollment Date	📅
⋮	STEPS Loyalty Member Tier	^_
⋮	STEPS Loyalty Program Name	^_
⋮	STEPS Loyalty Reward Points	#
⋮	STEPS Loyalty Status	^_
⋮	STEPS Loyalty Tier Points	#
⋮	Opt_in_Date	📅
⋮	Opt_in_Source	^_
⋮	Over Age	#
⋮	Preferred_Store	^_
⋮	Primary Language	^_
⋮	Program_Newsletter	^_
⋮	Program_ProductUpdates	^_
⋮	Program_PromosAndOffers	^_
⋮	Residence Country	^_
⋮	SubCategory Preference	^_
⋮	Yearly Income	#
⋮	Yearly Income Range	^_

> Related Attributes (0)

Segment Population ⓘ

**30,001**

100% of 2930001 total population

Excluded: 0 ⓘ

Segment Status
Active[Save](#)

Include Exclude

⋮ **Opt_in_Source** Is Equal To **Marketing**⋮ **Last Donation** Before **2023-01-07**⋮ **Avg. Donation Amount** Is Greater Than **30 £**⋮ **Last Engagement** Is Equal To **Website** Is Less Than **14 Days**⋮ **E-Shop Purchase** Is Equal To **True**⋮ **SubCategory Preference** Is Equal To **Volunteer**

AND ▾



Add another Attribute here

Journeys Dashboard > Journey
STEPS - Lapsed One time Donor Journey

Version 1

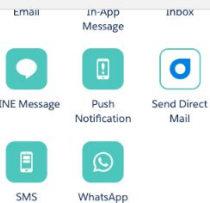


Save

Validate

Test

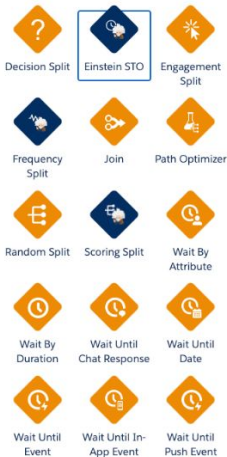
Activate



Advertising



Flow Control



Customer Updates

DATA EXTENSION

DATA EXTENSION NAME
STEPS - One Time Donors

RECORD COUNT
...

Schedule

START
June 7, 2023 12:00 AM

TIME ZONE
Eastern Standard Time

REPEAT
Hourly

REPEAT EVERY
1

END
Never

EVALUATE NEW
RECORDS ONLY
True





ENGAGEMENT
+16%



4 800
DONATIONS

ROI
£237K

**What if generative AI
could learn from my CRM data?**



The Future of Marketing



Einstein GPT

Our Approach

Security

Trust

Relevance

Ecosystem

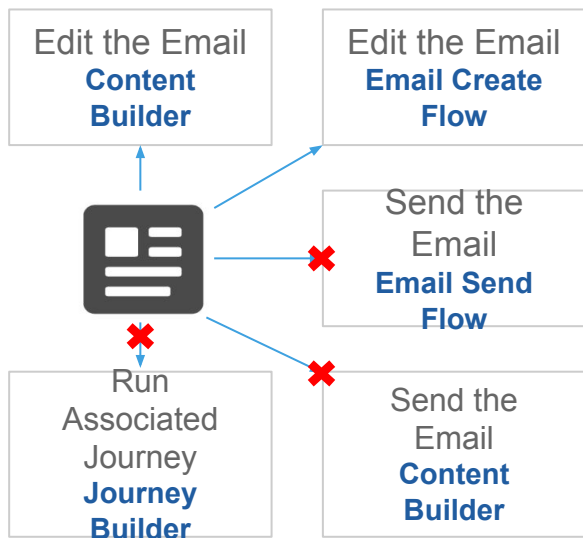


Provide guardrails

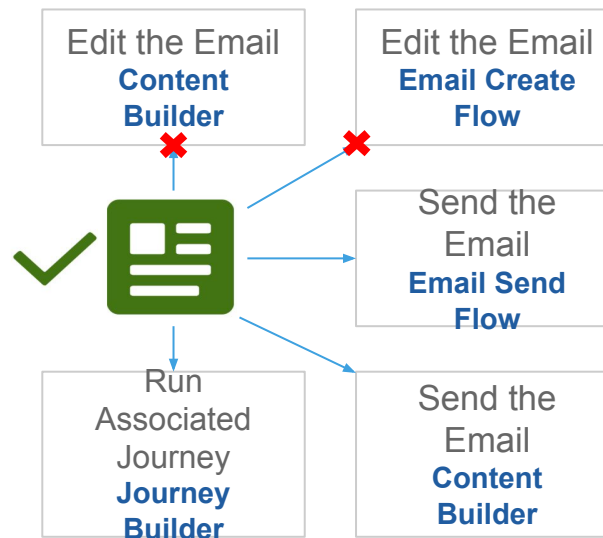
Integrated approval



Before Approval



After Approval



Conclusion



AI

**Increased Productivity
and Efficiency**
reduce mundane tasks

**Personalized
Stakeholder Experiences**
driven by better insights



Data

Unified Data
saves time

Actionable Insights
based on real-time unified
profile data



Impact

Capacity: higher value
projects

Income: better results
from Fundraising efforts

Impact: improved
outcomes for program
participants



How can nonprofits with limited resources and technical expertise get started with AI?



“How could AI help us?” mentality

salesforce

Your Culture

The Tools



Segmentation
and
Orchestration



Content
and Copy



Trusted
AI



Insights



“How could AI help us?” mentality

salesforce

The Culture

Culture of Trust

Culture of
Experimentation

Vision

Derisk and prove value

Optimization

Celebrate

The Tools



Segmentation
and
Orchestration



Content
and Copy



Trusted
AI



Insights



Q&A





Thank you

