

THE NONPROFIT'S GUIDE TO

PEER-TO-PEER FUNDRAISING PLATFORM INTEGRATIONS WITH SALESFORCE

What to know about data flow, email customization,
dashboards, reports, and more



CONTENTS

ABOUT THIS GUIDE	3
FOREWORD	4
INTRODUCTION	5
DATA FLOW	6
EMAIL CUSTOMIZATION AND EXECUTION	21
REPORTS AND DASHBOARDS	30
TAKE THE NEXT STEP	37



ABOUT THIS GUIDE

This guide provides an introduction to peer-to-peer fundraising platforms that integrate with Salesforce. It includes an overview of 10 platforms, and dives into some key details about each product's integration with Salesforce, including:

Data Flow



Email Customization



Reports and Dashboards



A FEW IMPORTANT NOTES

This guide covers many of the leading platforms available for peer-to-peer fundraising as of the guide's writing in September 2019. The world of peer-to-peer fundraising technology is continually changing; vendors are constantly updating and enhancing their platforms and introducing new features. This guide offers an introduction to each platform and does not attempt to include every detail about every feature included in each platform.

Cathexis Partners strongly recommends that organizations review specific requirements to support their campaign(s), missions, and audiences; request software demos; and closely review any contracts with software platform vendors before making a software purchase.

Cathexis Partners has not received compensation for including any product or information in this guide.

Please keep in mind that the examples provided in this guide may be seasonal, and links may not work in the future.

FOREWORD

Getting a clear picture of how your participants and organization interact with each other is vitally important to the success of your peer-to-peer fundraising campaigns. When considering this interaction, data from past campaigns can be one of your most valuable tools in developing that picture. It can help provide a better and more personalized participant experience that ultimately improves fundraising results.

To access this data, it's important to consider how (and if) your peer-to-peer fundraising software platform shares data with your constituent relationship management (CRM) system, donor database, and/or database of record.



What would a nonprofit, running peer-to-peer fundraising campaigns, need to know about how peer-to-peer platforms integrate with Salesforce?

As Salesforce CRM gains momentum in the nonprofit and higher education worlds (it's a versatile and open platform that provides a robust database of record for organizations of all sizes), many of today's peer-to-peer fundraising platforms integrate directly with Salesforce. But that integration can mean many different things to many different people.

Using the right peer-to-peer fundraising platform with Salesforce, you can see the entire engagement lifecycle of your constituents, how they interact with your organization and staff, and how your organization and staff interact with them.

With all this in mind, I kept asking myself: "What would a nonprofit, running peer-to-peer fundraising campaigns, need to know about how peer-to-peer platforms integrate with Salesforce?"

In this guide, we set out to shed light on this topic — providing important considerations and background information to help you choose the right solutions and take your peer-to-peer fundraising to new heights.

I hope you find it valuable!

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INTRODUCTION

Technology has come a long way since the first major online peer-to-peer (p2p) fundraising tools were introduced less than two decades ago. There is no shortage of participant, donor, and event meta data being captured in today's more sophisticated p2p platforms. And many of them integrate with the popular and powerful CRM solution, Salesforce and its Nonprofit Success Pack (NPSP).

In this guide, we review the importance of:

- creating customized email audiences
- personalizing email content to let your peer-to-peer participants know their efforts are noticed and appreciated — with a goal of retaining and expanding their support
- event analytics via running reports and viewing dashboards

We also provide an overview of 10 peer-to-peer fundraising platforms and how their default data integrations with Salesforce are configured. We reached out to the companies offering these p2p platforms, and we thank the teams who volunteered their time to provide responses and work with us throughout the creation of this guide.

The platforms are:

Classy	OneCause Peer-to-Peer
DonorDrive	Qgiv
Funraisin	raisin by A.K.A. New Media
Give Lively	Rallybound
iRaiser	Springboard by Jackson River

And finally, we look into some focus areas that are critically important for a successful online p2p fundraising program today.

NOTE



Salesforce is a highly customizable platform that can be configured to meet specific needs and requirements of an organization. This guide will address only default/base integrations. Whenever “Salesforce” is mentioned, it is referring to Salesforce with NPSP (Nonprofit Success Pack) installed.

DATA FLOW



HOW DOES THE DATA FLOW?

A major consideration when selecting Salesforce and other software solutions to support your organization is how the data flows between the different solutions (p2p, email, events, advocacy, etc.) and your CRM system, or database of record. It is imperative to have up-to-date information in your CRM system so your staff members can see a true and complete picture of every constituent's profile and connection with your organization.



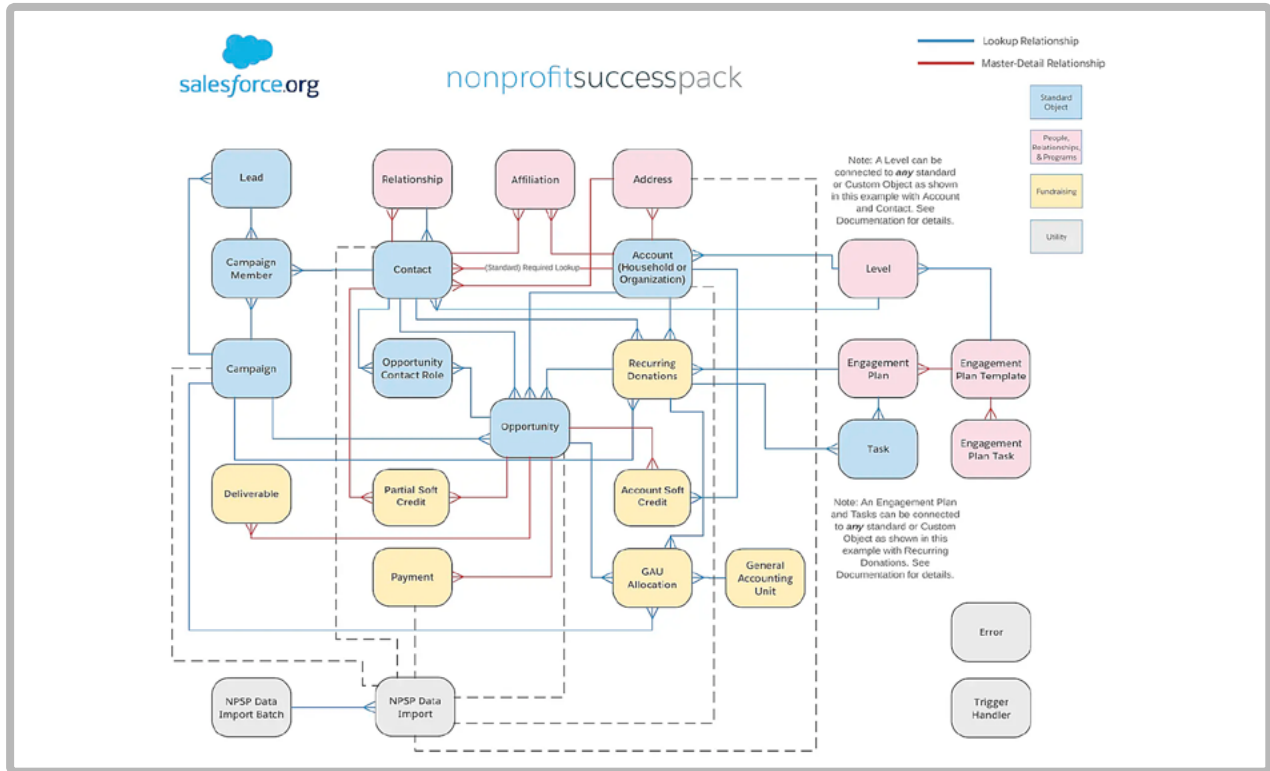
In many cases, data flow between your p2p tool and CRM system has multiple aspects to consider. For example, some p2p systems have robust email tools built into their platforms, while others rely on external email platforms for email content beyond basic auto-responder messages.

If your organization is using a third-party email tool, then data must also exchange between your p2p system and the email tool to allow for conditionalized and personalized email content. The path the data takes may be directly from the p2p platform to the third-party email tool, or it may go via Salesforce first.

In this section, we review how data flows between peer-to-peer tools and Salesforce.

OVERVIEW OF THE SALESFORCE DATA SCHEMA

To understand how data flows between any given p2p fundraising tool and Salesforce, it's helpful to visualize how data is organized in Salesforce. The following diagram outlines standard objects within the Salesforce NPSP environment. Standard objects are objects that are included with Salesforce such as Account, Contact, Lead, and Opportunity.



Work with your p2p platform vendor's representative to verify which objects and fields interact with Salesforce. Standard objects in Salesforce that relate to peer-to-peer campaigns are:

Salesforce Object	P2P Platform
Campaign	Event or campaign
Contact	Donor, participant, or volunteer
Account	Sponsor or organization
Opportunity	Donation or pledge
Opportunity Contact Roles	Soft credit given to participant/fundraiser for donation they did not make, but did influence
Products	Ecommerce purchases, if applicable



NOTE

Custom objects and fields affect data storage limits within Salesforce. Be aware of potential fees if default storage is exceeded as a side effect of an integration with a third-party product

In addition to knowing what data will flow between systems, it's important to consider in what direction data will flow — from the p2p platform to Salesforce, the reverse, or both — and how often data will flow. This will determine where you need to enter offline transactions to ensure your platform's progress meters and your internal reporting are accurate.



A TIP FROM ONECAUSE

Your Salesforce integration should include a level of contact matching functionality to help avoid duplicates and provide a way to review potential duplicates before adding them to Salesforce. Customize contact matching criteria to ensure the right contacts are added in Salesforce and to keep the list of potential matches more manageable. First, choose the appropriate threshold for matching. For example, use stronger contact matching criteria if you expect most contacts to have a known email address or weaker contact matching criteria if you think email addresses might be stale. Secondly, consider adding custom fields to your matching criteria, especially for fields you require in Salesforce.

The following chart provides a breakout of key data integration points to review if you are using, or considering using, Salesforce and one of the p2p platforms included in this guide. But first, a guide to those integration points and questions they raise:

- **Data Flow** — In what direction does data flow (peer-to-peer platform to Salesforce, Salesforce to peer-to-peer platform, or bi-directional)?
- **Frequency of Sync** — Does the synchronization happen in real time, on a regular schedule, or based on a manual push?
- **Offline Transactions** — Can offline transactions (registrations and/or donations) be entered in the platform and synchronized with Salesforce? If not, can they be entered in Salesforce and synchronized with the p2p platform, or does it require dual entry? In the chart that follows, “either” means that data can be entered in either system and will flow to the other. “Both” means offline transactions must be entered in both systems to be reflected in both. “p2p,” means data must be entered in the peer-to-peer platform.
- **Lightning-Ready** — Is the product compatible with Lightning, the component-based framework for Salesforce app development that allows for simplified processes and an optimized user interface?
- **Sync Cost** — What are one-time and ongoing support integration costs?

DATA INTEGRATION POINTS TO CONSIDER – P2P PLATFORMS AND SALESFORCE

	Data Flow	Frequency of Sync	Offline Transactions	Lightning Ready	Sync Cost
Classy	p2p -> SF	real time	p2p	yes	\$149/month
DonorDrive	p2p -> SF	configurable; up to once per minute	both	yes	from \$299/month
Funraisin	p2p -> SF	configurable; hourly by default	p2p	yes	none
Give Lively	p2p -> SF	hourly	p2p	yes	none
iRaiser	Bidirectional	real time	p2p	yes	from 265€/month & set-up from 2.500€
OneCause	p2p -> SF	daily or manually	both	yes	\$200/month
Qgiv	p2p -> SF	real time, hourly, or manually	p2p	yes	\$10-15/month
raisin	p2p -> SF	every 15 minutes by default	p2p	yes	monthly fees
Rallybound	Bidirectional	real time or manually	either	yes	one time based on custom mapping
Springboard	Bidirectional	configurable; every 10-20 minutes by default	p2p	yes	none

Be sure to check with p2p platform representatives for the latest information regarding functionality, overall costs, and specifications.

A TIP FROM DONORDRIVE



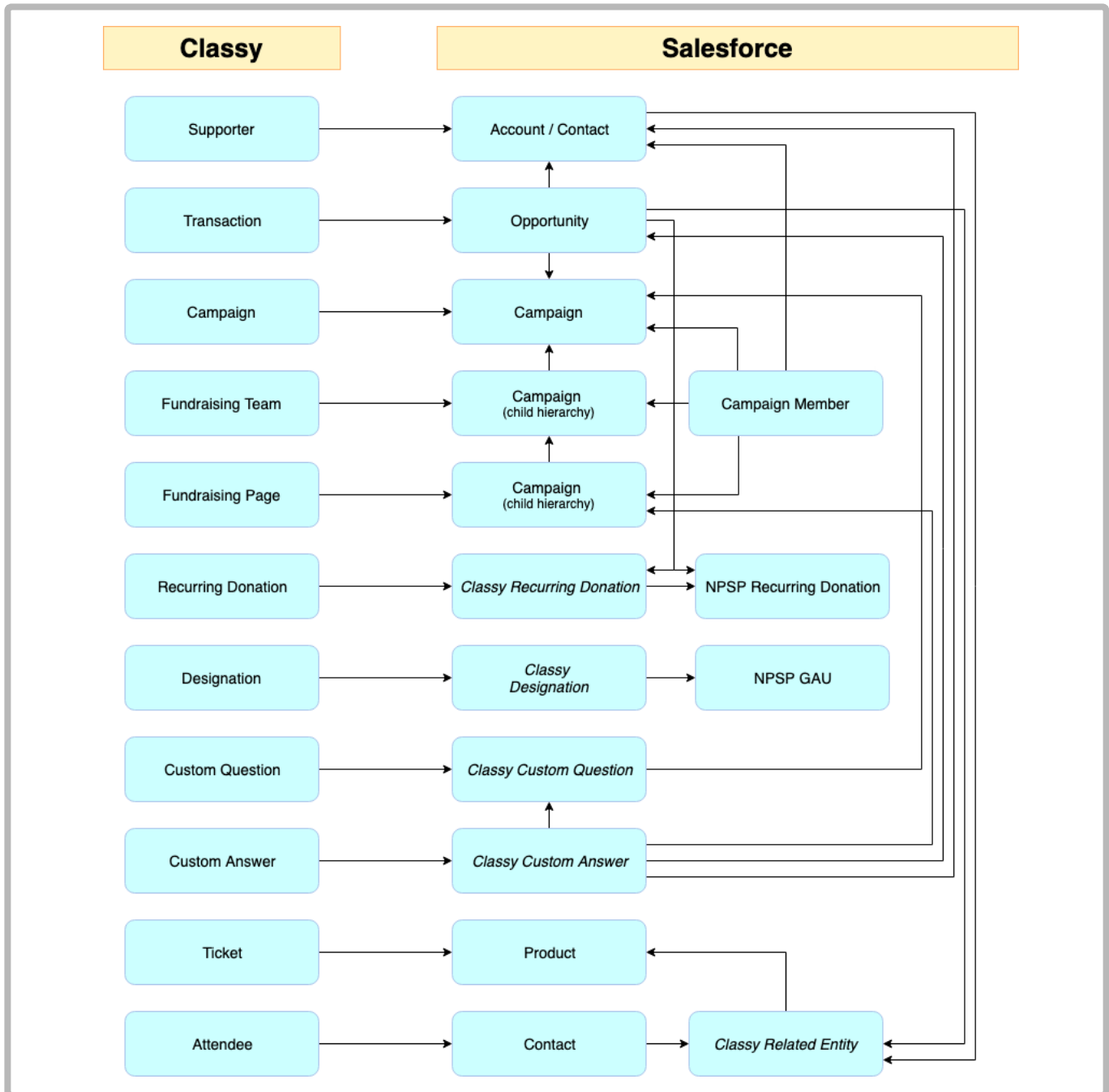
Use your Salesforce data to track the overall impact of your peer-to-peer participants. You may find that some of your small donors are responsible for substantial dollars through their peer-to-peer fundraising.

We asked each platform representative to provide a data diagram or documentation regarding their data integration with Salesforce. Following is a summary of information provided.

Classy

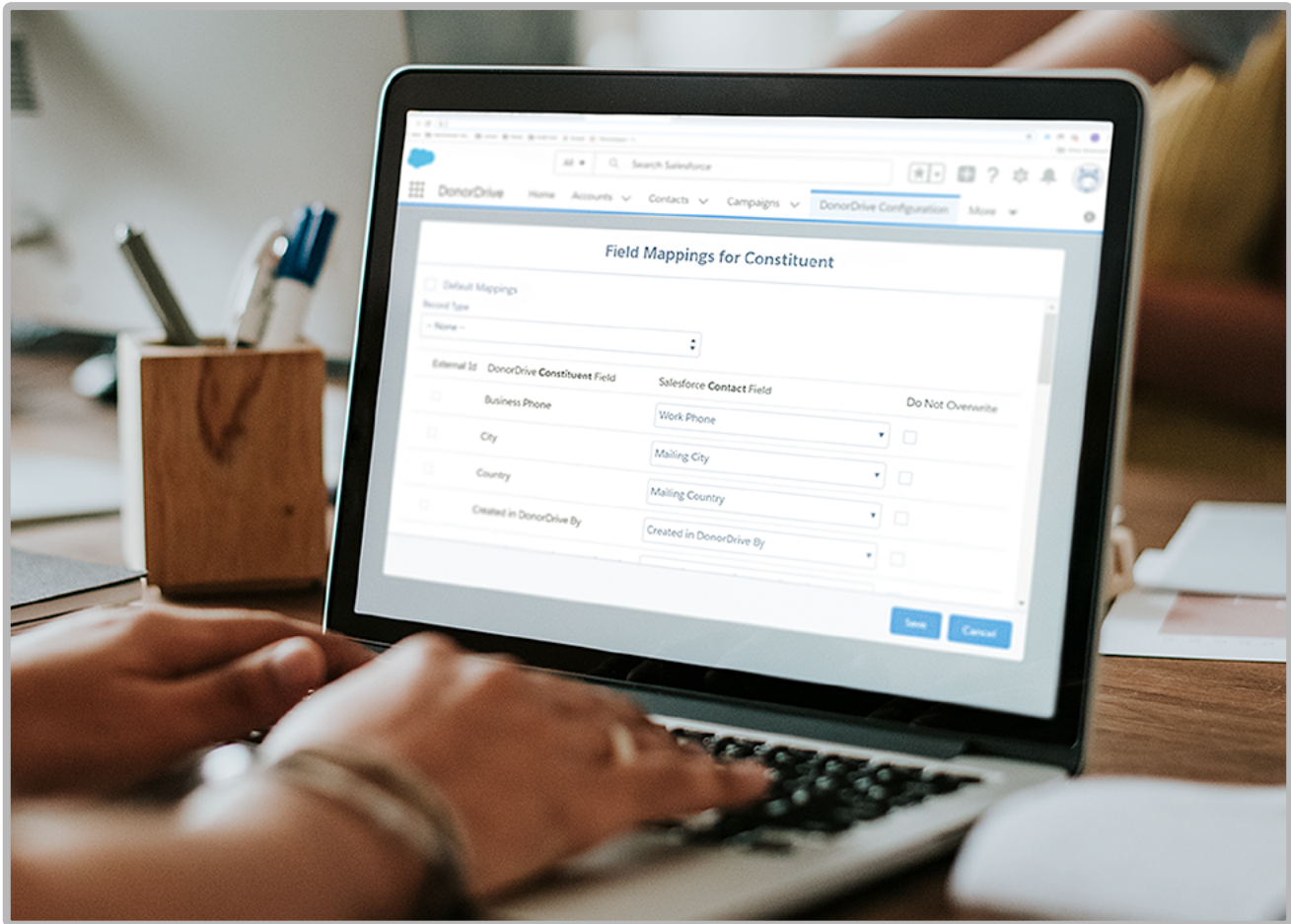
For more information:

- [Classy for Salesforce Documentation](#)
- [Classy for Salesforce Control Panel Overview](#)
- More information on Classy's Salesforce integration can be found on the [AppExchange](#).



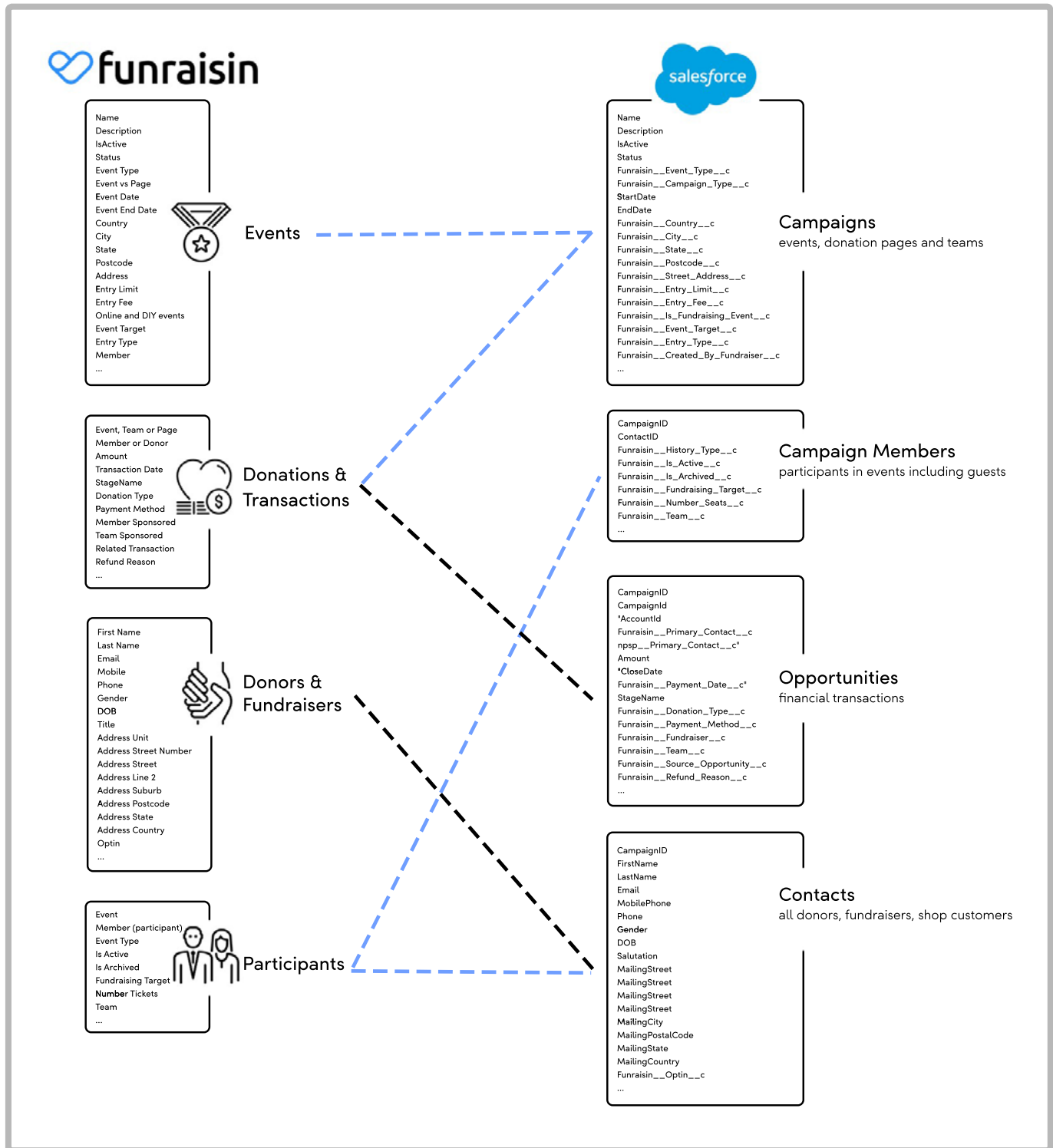
DonorDrive

A bi-directional sync is in the works for future release. More information on DonorDrive's Salesforce integration can be found on the [AppExchange](#). Below is a screenshot of DonorDrive's configuration settings within Salesforce.



Funraisin

Detailed documentation available [here](#).



More information on Give Lively's Salesforce integration can be found on the [AppExchange](#). Additional information is available on their [website](#) and [Salesforce Logic Fields.pdf](#).

Salesforce Logic & Fields

Sync Donations

1. Get a list of all donations generated in the GL platform for Nonprofit
2. Check to see whether `sf_opportunity_id` already exists on the GL platform for given donation. If so, skip. If not, do the following:
3. Query SF API to get a list of all SF "Opportunity" object fields for given Nonprofit SF Instance
4. Check whether `npsp__Acknowledgment_Date__c` is one of the object keys. If so, assume the SF instance has NPSP installed.
5. Parse out donor email address
6. Query Nonprofit SF Instance to check whether email is already in Nonprofit SF Instance
 - a. If so, get SF Contact ID
 - b. If not, create a new Contact with the following fields:
 - i. `Email`
 - ii. `FirstName`
 - iii. `LastName`
 - iv. `Phone`
 - v. `LeadSource: "Give Lively"`
 - vi. `MailingPostalCode`
 - vii. `MailingCountry`
7. Assumes "Account" is automatically created, regardless of whether NPSP installed
8. Create Opportunity record with the following fields:
 - a. `AccountId`
 - b. `Amount`
 - c. `Name: <donor_name> - $<donation_amount> - <recurring_or_one_time> <product_type>`
 - d. `CloseDate`
 - e. `StageName: "Posted"`
 - f. `Probability: 100`
 - g. `LeadSource: "Give Lively"`
 - h. `Type: <"Recurring" or "One Time">`
 - i. If NPSP is installed, also sync:
 - i. `npsp__Acknowledgment_Date__c`
 - ii. `npsp__Acknowledgment_Status__c: "Acknowledged"`
 - j. `CampaignId: sf_campaign_id` or `null`
 - i. If Donation was made through a GL Campaign, and the GL Campaign was already synced to Salesforce, then we retrieve the SF Campaign Id of the synced Campaign and insert it here.

iRaiser

iRaiser supports 18 languages: English, French, Dutch, German, Spanish, Italian, Portuguese, Danish, Swedish, Norwegian, Finnish, Traditional Chinese, Simplified Chinese, Arabic, Russian, Japanese, Korean, and Malaysian. In addition, iRaiser supports 135 different currencies. It's also possible to manage different bank accounts and multiple gateway accounts within iRaiser.

Each Salesforce sync is custom, based on the client's needs.

Administration Account: admin Languages: English French View application Disconnect

Notifications / exports

+ Add a notification

SALESFORCE SANDBOX

ID	Notification	Next launch	Actions
1	Instant Synchronization to Salesforce	Instant	Set up Duplicate Delete
3	Replay on demand Synchronization to Salesforce	Inactive	Set up Duplicate Delete

SALESFORCE LIVE ENVIRONMENT

ID	Notification	Next launch	Actions
2	Instant Synchronization to Salesforce	Instant	Set up Duplicate Delete
4	Replay on demand Synchronization to Salesforce	Inactive	Set up Duplicate Delete

SALESFORCE LIVE ENVIRONMENT #2 (W/ MARKETING CLOUD)

ID	Notification	Next launch	Actions
5	Instant Synchronization to Salesforce	Instant	Set up Duplicate Delete

[API - Shortcodes documentation - Version - Support](#)
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Synchronizations Automatic Imports Exports ACTITO ISS Front Imports Configuration Administrator

Export runner / Salesforce instant synchronization

EDIT CREATE Attachment(s) Action 1/1 < >

LAUNCH EXPORT RESET EXPORT

Informations

Name of export: Salesforce instant synchronization
Mode: Simple
Data to export: Donations

Filters

Segment: Contacts Opt-in
Campaign: WEB 2019

Mode

Runner Type: Automatic

File Format

Name of exported file: salesforce_{(date)}.json
File format: JSON

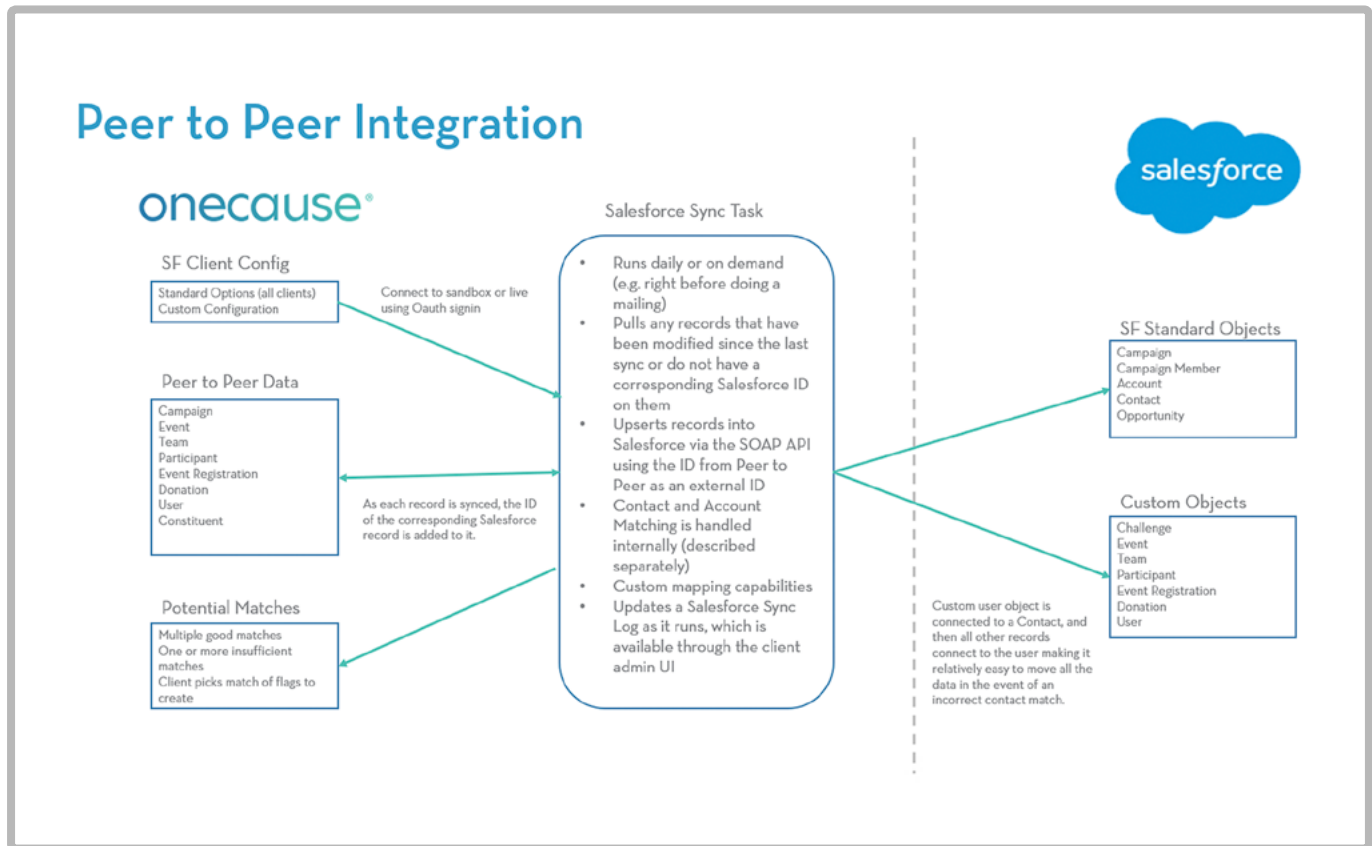
Content Help Preview Details History

Field	Header	Filter	Example
Contact email	Contact_Email		j.doe@my-ngo.com
Contact name	Contact_Name	Title case	John Doe
Donation amount	Opportunity_Amount		500
Donation currency	Opportunity_CurrencyIsoCode		EUR
Donation reference	Opportunity_Donation_Reference	Upper case	REF1234
Donation payment method	Opportunity_Payment_Method	Capitalize case	Paypal

OneCause

Diagram of OneCause's integration with Salesforce below and documentation available [here](#):

- Custom child objects are added to avoid cluttering your existing objects.
- Pending matches feature follows your matching rules to determine contacts that could have more than one match and includes an easy interface for staff to match or add records and clear these pending matches.
- A detailed log shows any error messages received from Salesforce workflows.



Qgiv

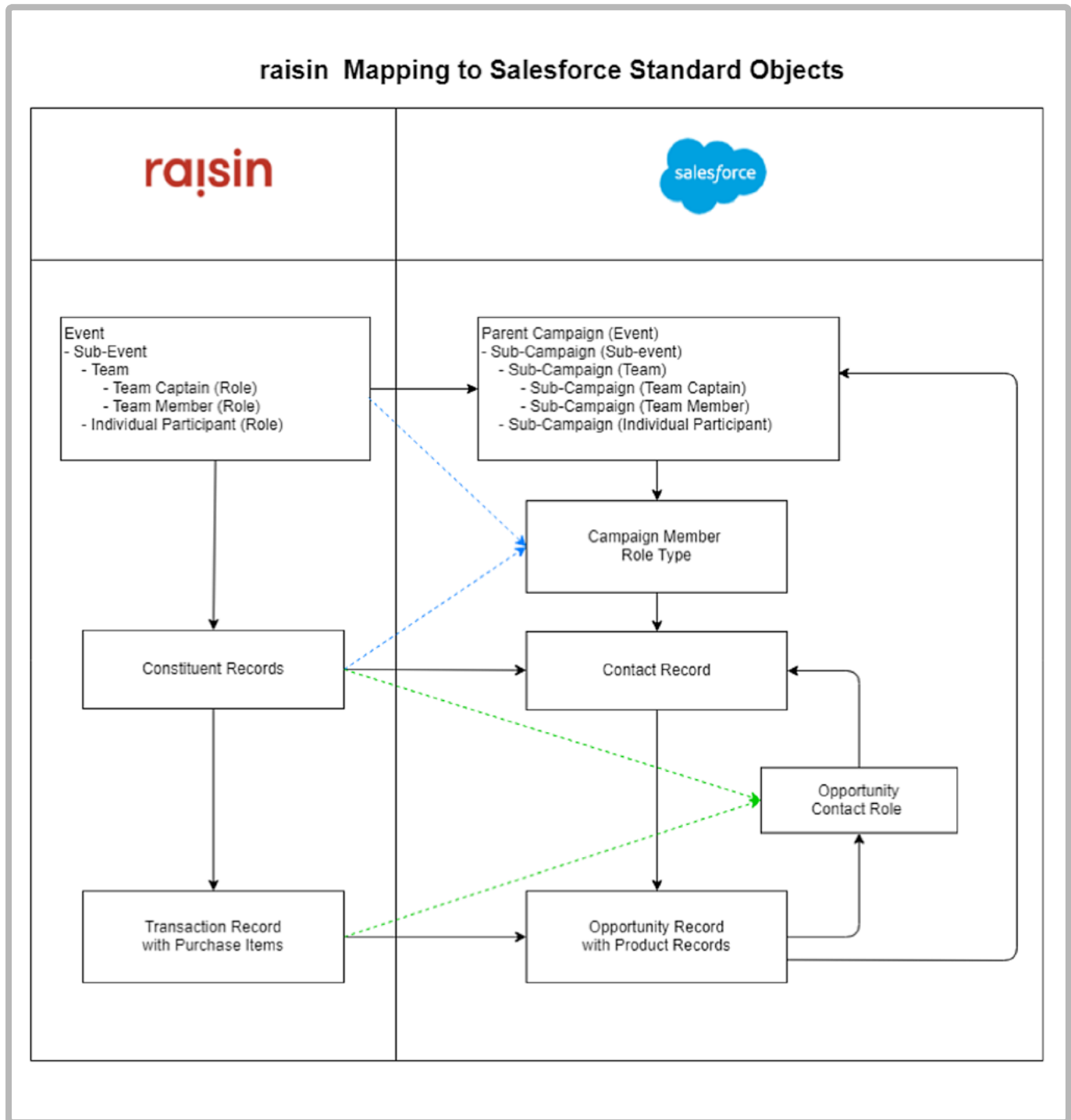
Qgiv recently released a new integration that is configurable from within the Qgiv control panel. Following is an overview of Qgiv to Salesforce object/field mapping:



Qgiv Value	Target Object	Target Field	Notes
Transaction Date	Opportunity	CloseDate	
Amount	Opportunity	Amount	
N/A	Opportunity	CampaignID	Dynamic Mapping (Not required)
N/A	Opportunity	GAU Allocation(s)	Dynamic Mapping (Not required)
N/A	Opportunity	LeadSource	Setting
N/A	Opportunity	Stage	Setting
N/A	Opportunity	Description	Non standard field data
Name	Account	Name	Company donations only
First Name	Contact	FirstName	Individual donations
Last Name	Contact	LastName	Individual donations
Salutation	Contact	Title	Individual donations
Street Address	Contact	MailingStreet	Individual donations
Street Address	Account	ShippingStreet	Company donations only
Billing Street Address	Account	BillingStreet	Company donations only
City	Contact	MailingCity	Individual donations
City	Account	ShippingCity	Company donations only
Billing City	Account	BillingCity	Company donations only
State	Contact	MailingState	Individual donations
State	Account	ShippingState	Company Donations
State	Contact	MailingStateCode	If State and Country/Territory Picklists Enabled
State	Account	ShippingStateCode	"Company Donation If State and Country/Territory Picklists Enabled"
Billing State	Account	BillingState	Company donations only
Billing State	Account	BillingStateCode	"Company Donation If State and Country/Territory Picklists Enabled"
Zip	Contact	MailingPostalCode	Individual donations
Zip	Account	ShippingPostalCode	Company donations only
Billing Zip	Account	BillingPostalCode	Company Donations
Country	Contact	MailingCountry	Individual donations
Country	Account	ShippingCountry	Company Donations
Country	Contact	MailingCountryCode	If State and Country/Territory Picklists Enabled
Country	Account	ShippingCountryCode	"Company Donation If State and Country/Territory Picklists Enabled"
Billing Country	Account	BillingCountry	"Company Donation If State and Country/Territory Picklists Enabled"
Billing Country	Account	BillingCountryCode	"Company Donation If State and Country/Territory Picklists Enabled"
N/A	Account	RecordTypeId	"Company Donation If State and Country/Territory Picklists Enabled"
Phone	Contact	HomePhone	Individual donations
Phone	Contact	Phone	Individual donations
Phone	Account	Phone	Company donations only
Email	Contact	Email	Individual donations
Email	Contact	npe01__HomeEmail__c	
N/A	Opportunity	RecordTypeId	Setting

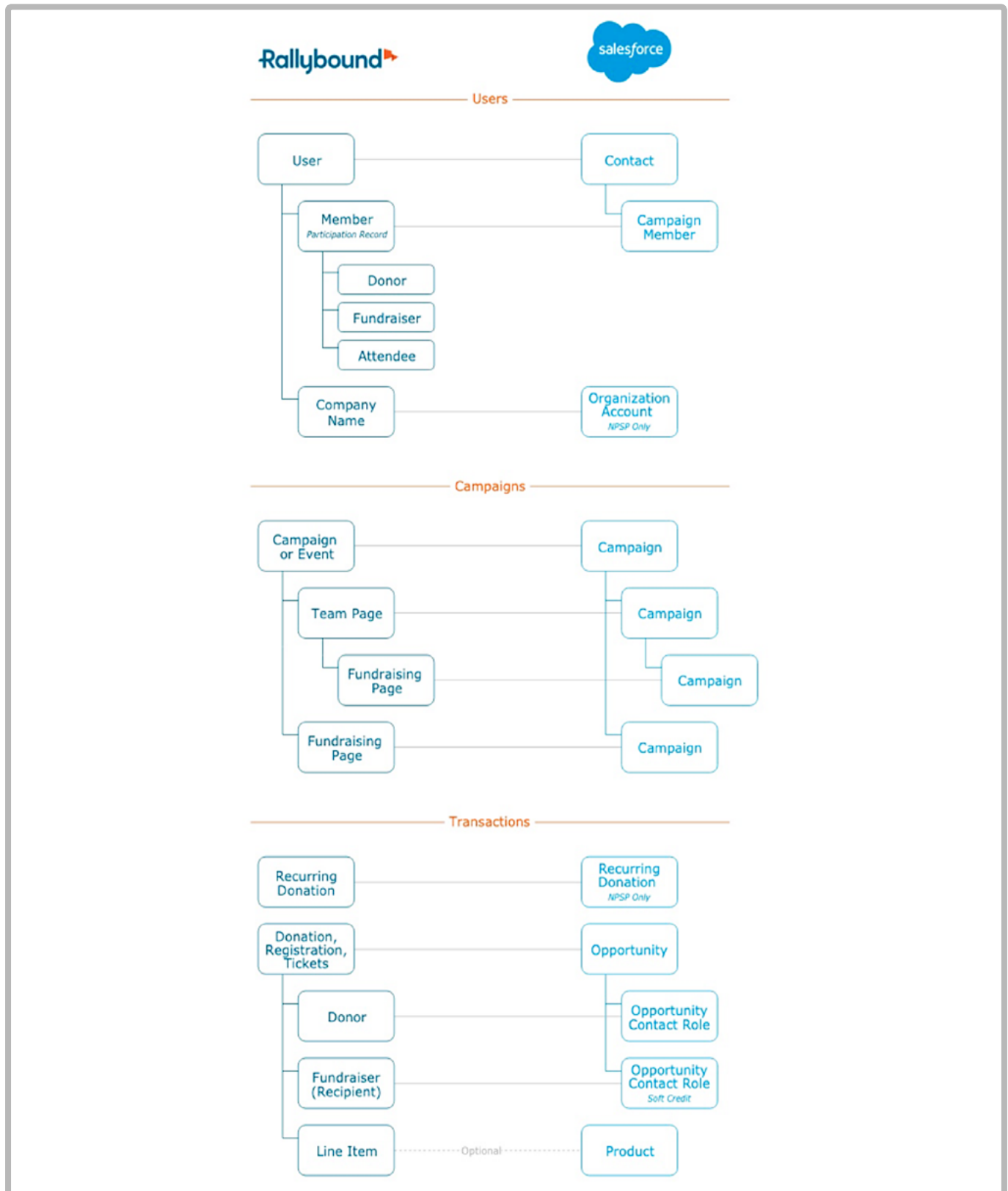
raisin

In the raisin integration, Events (including all sub-campaigns under the event) map to Salesforce Campaigns and Sub-Campaigns. Constituents map to Salesforce Contacts, Transactions with Salesforce Opportunities, and Purchase Items with Salesforce Products. The integration uses all the native Salesforce objects, leveraging the power of Salesforce without extensive customization. All modules (P2P, Donations, Ticketing) are mapped to Salesforce.



Rallybound

More information on Rallybound's Salesforce integration can be found on the [AppExchange](#) diagram of Rallybound's data integration with Salesforce:

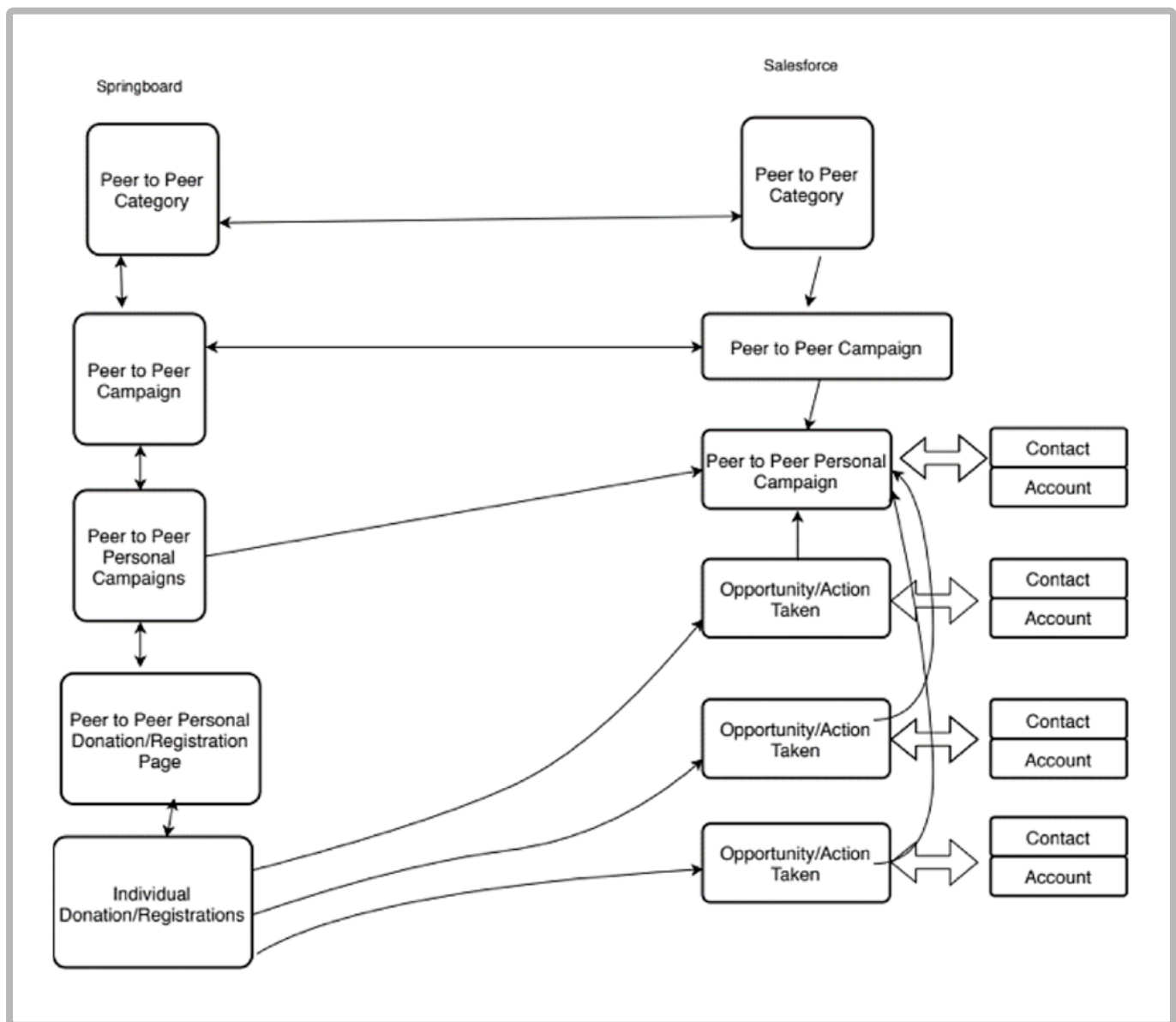


Springboard

The integration between Salesforce and Springboard is flexible and customizable according to an organization's needs. Clients have used p2p functionality in many different ways — from helping supporters set up birthday and life-event campaigns to raise money for organizations they care about (DIY fundraising); to empowering users to set up local events, petition signings, marches, training, and film nights (p2p for events and advocacy); to creating virtual events to encourage supporters around the world to come together to raise money for an event, no matter where they are.

Salesforce and Springboard share a commitment to the customizability of how data can be architected and stored in order to create highly customized, personalized, automated marketing journeys for cultivating p2p participants.

More information on Springboard's Salesforce integration can be found on the [AppExchange](#). Here is a diagram of Springboard's data integration with Salesforce:



EMAIL CUSTOMIZATION AND EXECUTION



Despite the popularity of social media, email communication continues to be a vital tool in an organization's peer-to-peer fundraising toolkit. But many organizations still send out generic recruitment and fundraising emails to their constituents, participants, and donors.

Advanced p2p fundraising tools allow for focused, personalized emails based on past action or inaction. With that in mind, this section focuses on how your p2p tool and Salesforce integration can help create dynamic, participant action-triggered email communications.

RESOURCE



Recent email marketing benchmarks are available from [Campaign Monitor](#).

EMAIL BEST PRACTICES AND TIPS FOR P2P CAMPAIGNS

When considering the integration between your p2p fundraising platform and Salesforce, it's important to start by thinking about what you're trying to accomplish with your p2p email communications. Here are four best practices for your p2p campaign emails:

1 Audience creation

Have you ever received a "please join us" email after you've already registered for an event? Sometimes this happens because a constituent is using more than one email address or has duplicate (unmerged) constituent records. Some of these issues are within an organization's control (regular data maintenance and deduplication efforts) while others, including constituents using different emails and slightly different names, are harder to identify and rectify. But every effort should be taken to maintain a clean data environment and create custom audiences with tailored messages.

2 Recruitment emails

Creating email audiences based on past participation, past team membership, and past fundraising is important. By doing so, you can send an early announcement email to past team captains, inviting them to register and reclaim their teams for your current campaign. Targeted communications help foster a sense of importance in constituents as they receive "insider" information. A few days after your early announcement, send an email to all past participants, excluding those who have registered. The hope is that your general past participant audience will click through to see teams that have already been formed, with participants registered and fundraising for the new campaign — encouraging them to take action as well.

Continue to send recruitment emails to non-registrants with new messaging, and highlight early-bird discounts on a regular basis.

3 Fundraising/coaching emails

Instead of sending general emails to all participants, limit communication to specific sub-sections of registrants and focus calls to action on raising more funds overall. For example, send an email exclusively

to participants who haven't updated their personal fundraising pages; include examples of constituents who have done so, and steps on how to upload their own image and story.

Another message could go out to participants who have updated their personal pages, but have not raised any money, to say "great job, your page looks awesome," and include tips for posting to social media and sample text for sending fundraising emails to friends. Yet another message could be created for team captains to share tips for recruiting additional team members.

4

Communication automation

Work toward automating your email and social media communications so you have more time to focus on optimizing other aspects of your p2p campaign. Imagine p2p emails being scheduled and sent automatically after participants register, receive a donation, or post to social media. Or, having the ability to create an entire communications calendar, and then pre-schedule emails.

Be prepared to adjust campaign messaging as needed, based on recruitment and fundraising trends identified through your p2p platform's reports and dashboards.

Activity	Timing	Audience	Description	Call to Action	Content
Direct Mail	19 weeks out	all constituents (or all within state, zip codes)	event announcement	Register	link, early bird discount code, QR Code and Hash tag
recruitment email	18 weeks out	past team captains	event announcement	Register	link, early bird discount code and hash tag
Social media	18 weeks out	facebook, twitter, etc	event announcement	Register	link, early bird discount code and hash tag
recruitment email	18 weeks out	past participants & donors net yet registered	event announcement	Register	link, early bird discount code and hash tag, Msg from ED
recruitment email	17 weeks out	all constituents net yet registered	event announcement	Register	link, early bird discount code and hash tag,
Participant email	16 weeks out	Team Captains	team captain email #1	Recruitment & Fundraising	Incentive program
Social media	16 weeks out	facebook, twitter, etc	previous year highlights	register	link & hash tag
Participant email	15 weeks out	all participants	coaching email #1	Recruitment & Fundraising	mission story, fundraising tips (update personal page)
Social media	15 weeks out	facebook, twitter, etc	daily updates	Register	link & hash tag
recruitment email	14 weeks out	all constituents net yet registered	Early bird discount expiration announcement	Register	link, early bird discount code and hash tag
Participant email	14 weeks out	Team Captains	team captain email	Recruitment & Fundraising	team captain success story, email 25 friends to join team
Social media	14 weeks out	facebook, twitter, etc	daily updates	Recruitment & Fundraising	link & hash tag
Participant email	13 weeks out	all participants	coaching email	Recruitment & Fundraising	Incentive program
Social media	13 weeks out	facebook, twitter, etc	daily updates	Recruitment & Fundraising	link & hash tag
Participant email	12 weeks out	Team Captains	team captain email	Recruitment & Fundraising	mission story, top teams spotlight
Social media	12 weeks out	facebook, twitter, etc	daily updates	Recruitment & Fundraising	link & hash tag
Participant email	11 weeks out	all participants	coaching email	Recruitment & Fundraising	mission story, fundraising tips (email 10 friends)



EMAIL CUSTOMIZATION EXAMPLES

Below are two specific email customization scenarios followed by the steps required to build these messages in Funraisin and Springboard. These examples help illustrate the varied email customization functionality available in advanced peer-to-peer platforms.

SCENARIO 1: RECRUITMENT

An organization is about to launch their second annual campaign on a p2p platform that was run on the same platform last year. They want to send the following email to all past participants with the appropriate personalization where indicated.

Hello, {First name}.

Can you believe it's that time again? Our Race for Fun will be held on August 1.

{If team captain last year "As the team captain for {last year's team name}, we hope you and your teammates will be able to join us again!"}{If team member last year "As a member of {last year's team name}, we hope you and your teammate can join us again!"}{If individual participant "We hope you can join us again this year and maybe consider bringing your friends and family along to start a team!"}

Register here {link to auto-log them in so fields are pre-populated and available to update}

SCENARIO 2: FUNDRAISING

One month prior to the event, an organization wants to send the following email to all registrants with appropriate personalization where indicated.

Hello, {First name}.

We hope you're looking forward to next month's race as much as we are!

{[participants who haven't updated their personal page "We have seen that participants who personalize their fundraising page raise more money. Here are some tips to updating your page."][participants that have updated their personal page "Your personal page looks great! Thanks for taking the time."]}

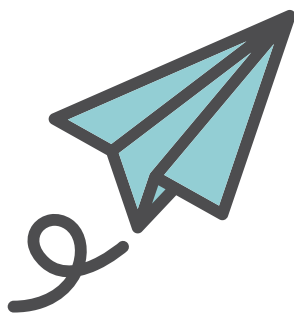
{[Raised \$500 or more, "Great job on raising (funds raised here)! Keep up the great work!]
[Raised \$10-499, "Thanks for raising (funds raised here) so far. Here are some tips to raise more.]
[\$0 raised, "Here are some tips to make it easier to ask your friends and family to support you."]}

How it works with Funraisin

Time-based emails are accomplished via native integration with MailChimp, Campaign Monitor, and Autopilot.

The steps are as follows:

- 1 Connect preferred marketing automation platform by adding in API keys.
- 2 Select the list in your marketing automation platform you would like to sync with participant data.
- 3 Add the custom fields you would like to sync. In the examples given, the fields would include:
 - First Name
 - Last Name
 - Email
 - Team Name
 - Is Captain (Y/N)
 - Amount Raised
 - Team Raised
 - Funraisin hash (unique registrant URL allowing for pre-population of personal details)
- 4 Segment your list to allow targeting of past Team Captains, Amount Raised, Cohorts, etc.
- 5 Set up your campaign emails (imagery, copy), choose the list you wish to target (the list you are syncing data to), choose the segment you wish to target (Captain vs. Member, Amount Raised, Cohorts, etc.) and send emails in real time.



How it works with Springboard

The steps required to create and send personalized messages depend on the email platform an organization is using with Salesforce.

Most platforms can call on sophisticated Salesforce data (provided by Springboard) in order to send personalized emails with conditionalized content. In most email platforms, an organization can directly choose the personalization fields and set up conditionalized content when creating/automating an email (provided these objects are available to the email platform via Salesforce).

The following scenarios assume the use of Salesforce Marketing Cloud.

SCENARIO 1:

1. To set up a journey or marketing automation series, go to the journey builder in your email platform.
2. Select the audience or entry source based on the peer-to-peer campaign registration.
3. Ensure contact fields are correctly mapped to pull in the personalized name and contact fields you'd like to include.
4. Use peer-to-peer objects (campaigns and personal campaigns) to create decision trees and pull in personalized data, usually through data extensions.
5. Create your email template using tokens to pull in the contact information and render personalized messaging via conditionals.
6. Start the journey or automation series.

SCENARIO 2:

1. To set up a journey or marketing automation series, go to the journey builder in your email platform.
2. Select the audience or entry source based on the peer-to-peer campaign registration.
3. Ensure contact fields are correctly mapped or available to pull in the personalized name and contact fields you'd like to include.
4. Use peer-to-peer objects (campaigns and personal campaigns) to create decision trees and pull in personalized data, usually through data extensions.
5. Create a decision tree once the audience has been selected for the journey.
6. Using data from the peer-to-peer objects, you can then create two journeys according to whether the audience has updated their personal campaign page and messaging.
7. Choose and personalize your template for the distinct journeys.
8. For those who have created a campaign, you can use conditional content to pull in the amount-raised ranges.
9. Start the journey or automation series.

EMAIL EXECUTION

Some peer-to-peer platforms include email marketing tools, while others focus on integrating with third-party email tools. At a minimum, all 10 platforms included in this guide offer system-generated email autoresponders and receipts based on transactions.

Following is an overview of each platform's email capabilities.

Classy

Classy has built-in functionality for automated triggered emails based on fundraising progress, donation confirmation receipts, admin notifications and more. Classy Clients also use MailChimp, Constant Contact, Marketing Cloud, or other Salesforce-integrated email platforms for mass communications.

Organizations can configure the following emails right inside Classy:

- Milestone fundraising goals — triggered when a fundraiser reaches a % of their fundraising goal
- Fundraising page creation confirmation — triggered when a fundraising page has been created
- Administrator notifications — triggered specifically for admins
- Failed recurring donations — triggered when a recurring donation has failed
- Emails triggered from activity wall engagement — thank and acknowledge gifts on the donation activity wall and trigger an immediate email

DonorDrive

Emails can be sent directly from DonorDrive, and also offer deep integration with Salesforce Marketing Cloud.

Triggered and scheduled notifications can be configured by the organization and are behavior-based. Administrators can add filters to both types of communications to target the audience that will receive each notification.

For scheduled messages, administrators can associate organization-defined dates to a communication (for example, dates based on registration date or event date).

Triggered notifications can be configured to include email, text, and tweets when sending to a fundraiser. Additionally, clients can associate achievement badges to a triggered notification when a fundraiser accomplishes a goal, such as personalizing their personal fundraising page.

Automation can be configured based on organization-defined dates (for example, sending an email on x day, x # of days after registering, or x # of days prior to event), levels achieved, or interactions with the system (for example, raised \$100, updated personal page, had a team member join, etc.). In addition, automation can be based on behavior the constituent has not yet taken.



Funraisin

In addition to being able to set up more than 30 “transactional” emails, organizations can set up unlimited email and SMS triggers based on funds raised (for example, specific donation amounts for members/teams/donors, percentage of fundraising goal reached, and more), fitness activity (distance, steps, duration of movement, and more), and interactions (shared page, incomplete registrations, changed fundraising target, added profile picture, added personal story, and more).

Time-based emails are done via native integrations with Autopilot, Campaign Monitor, and MailChimp.

Give Lively

In addition to standard autoresponders, Give Lively is scheduled to release level-based achievement emails this summer. Clients use third-party email platforms that integrate with Salesforce for mass communications.

iRaiser

iRaiser provides autoresponders, ad hoc emails, and email automation with an email scheduler. Clients can work as a team and see every change that has been done by whom and when. Pages and emails can be edited using the available drag-and-drop editor. iRaiser offers deep user rights and a high level of security and scalability to handle high traffic volume.

The client can set up as many email and SMS notifications they want based on the behavior of the supporter that register, fundraise, and donate.

OneCause

OneCause includes three types of built-in email messages:

- 1 Transactional messages (customizable triggered messages based on interactions, such as a registration confirmation and welcome, new registrant reminders/welcome series, donation receipt/thank you, notification when a participant or team receives a donation, notification when someone joins your team, etc.)
- 2 Milestones messages (customizable triggered messages based on achievement such as number or amount of donations received or points earned)
- 3 User-sent emails (built-in default messages used by participants to fundraise, recruit others, share pages that participants may customize before sending)

OneCause also offers integration with MailChimp and with Salesforce to support use of other email tools for segmented, mass communications.

Qgiv

Qgiv can send donation receipts, registration receipts, and shop purchase receipts. Qgiv also can send staff and fundraising participants notifications about donations, updates about fundraising milestones, and other changes in participant or team status. There also are email campaigns within the peer-to-peer system that can be sent based on parameters set by the organization (to certain sets of donors, participants, etc.).

Other emails can be sent via integrations with various email services, including Campaign Monitor, Constant Contact, Emma, Klaviyo, and MailChimp.

Nonprofits may send emails based on their own dates, and they may be scheduled or sent immediately. Some of the

most popular triggers nonprofits use for their emails include defined dates, percentage of goals reached, and other rules. Nonprofits may, for example, send an email to any participant who has been inactive for a certain number of days.



raisin

Transaction-based emails (e.g., donation and registration emails), as well as scheduled emails can be generated directly from raisin. Automation can be sent based on organization-defined dates, milestone levels, and trigger-based emails.

raisin integrates with MailChimp and CRMs, allowing customers to leverage the emailing capabilities of their CRM or their associated marketing automation system.

Rallybound

Emails can be generated from Rallybound or through integration with third-party email tools such as Constant Contact, MailChimp, Marketing Cloud, or Pardot. Email automation supports organization-defined dates, achievement levels, and others.

For more information, see: [Custom Automated Emails documentation](#).

Springboard

Springboard has a native integration with Salesforce Marketing Cloud and other mass email platforms that integrate with Salesforce, which can be used to send emails to encourage users to create their own p2p campaigns as well as follow up with users who have signed up for p2p campaigns. Email platforms with Salesforce integrations such as Salesforce Marketing Cloud, IBM Watson Marketing (formerly Silverpop), Salesforce Pardot, and dotdigital Engagment Cloud (formerly Dotmailer) can all be used to communicate about p2p campaigns and follow up with campaigners who have created their own campaigns as well as those who have participated in personal campaigns and opted into organizational emails.

Email segmentation and automation can be based on any of the standard or custom fields that Springboard collects and syncs to Salesforce, depending on the email platform setup. Automated campaigns can be set up using almost any criteria sent to Salesforce, depending on the level of integration between Salesforce and the email marketing platform of choice. A number of Springboard clients use personal campaign creation date, goals metrics, campaign expiration, participant data, amount raised, and other data points to set up and send automated emails.

REPORTS AND DASHBOARDS



There are many ways organizations of various sizes and missions focus on data analysis.

Following are three perspectives to consider.

1 Campaign focus — Think about data important to your cause, which may include:

- Number of participants
- Number of donors
- Total funds raised
- Number of teams
- Average team size
- Average donation size
- Average number of donations per participant
- Number of \$0 donation participants
- Number of participants that updated their personal page
- Number of participants that sent out communications from the platform
- Participant answer to affiliation with the campaign
- How the participant heard about the event
- Event-specific details (T-shirt size, accessibility considerations, upsells, etc.)
- Geographical information

2 Sponsor focus — Provide potential sponsors with data that demonstrates value in the campaign and shows your participants are the same audience they are attempting to reach, such as:

- Participant and donor information listed above
- Site visitors
- Geographical and biographical information
- Interests (cause, brand, activity, or anything else available to create a participant persona)

3 Organizational focus — Investigate ways campaign participants and donors fit into the other activities of the organization:

- Year-over-year participation and/or donation by constituents
- Additional engagement (volunteerism, activism, general donations, etc.)

RESOURCE



Neon One recently released a [year-over-year revenue growth benchmark report for peer to peer campaigns](#).

Standard tabular reports of the information are great, but using dashboards to provide the types of information listed above into a visual representation can help highlight and communicate trends more quickly and effectively. Be sure to present p2p platform vendors with specific reporting and dashboard needs and scenarios to determine the level of effort it will take your team to retrieve the information important to you, your staff, your board, and your sponsors.



A TIP FROM RALLYBOUND

In your p2p fundraising software, establish specific Opportunity Contact Roles for supporters, such as “Runner,” “Cyclist,” and “DIY Fundraiser.” Be creative and make roles that fit your fundraising campaign efforts. Coupled with [NPSP customizable roll-ups](#) the Roles can be used to create insightful data on your supporters’ impact and value.

Following is a summary of each p2p platform’s default report offerings.

Classy

Organizations can have the flexibility to search, sort, and filter Classy reporting to create a report that suits their needs. Classy offers up to 14 out-of-the-box reports: including Transactions, Supporters, Recurring Giving Plans, Campaigns, Fundraising Teams, Fundraising Pages, Attendees, Upcoming Expiring Recurring Plans, Returning 1-Time Donors, Failing Recurring Giving Plans, Recurring Plans Over 1 Year, Inactive Top Donors, Inactive Top Fundraisers, and Recently Refunded Transactions.

Classy also has 12 reports built directly into the Classy for Salesforce control panel which can be used as a starting point and manipulated to build custom reports.

DonorDrive

DonorDrive’s first level of reports is Event Insights — a dynamic dashboard that shows real-time metrics such as daily activity, cumulative total, and year-over-year performance data at-a-glance. The second level is ready-to-go Global and Event/Campaign reports. The third level is Data Exports, which lets the nonprofit create highly unique and custom reports using the raw data in their DonorDrive instance.

Clients can apply multiple filters to view only the information they are interested in. The organization can schedule downloads to get the latest information when they need it (like weekly on Monday, for example). Lastly, data can be accessed programmatically via DonorDrive’s Reporting API.

Funraisin

Platform-level dashboards outline platform-level activity including today’s donations, today’s registrants, today’s fitness activity, and more. Event-level dashboards are specific to each event run off the platform.

Donations Insights provide average donation amount, largest donation amount, percent of donations via desktop versus mobile, top donation amounts, percent of donations by day of week and hour of day, and percent by donation type (self-donation, sponsored donation, generic donation, and more). Participant Insights provide

average raised per participant, average number of donations per participant, number of participants who have personalized their story/added profile pics/increased fundraising goal/increased fundraising target/shared page/sent thanks/reached goal, registrations by day of week and hour of day, and more.

Custom dashboards provide the ability for each administrator to create their own custom dashboards. Custom data exports allow customers to create custom CSV data exports with their chosen fields, define the field names, add hidden fields and default values, and more. Custom Data Exports can be password-protected and emailed daily/weekly/monthly at predefined times of the day or can be SFTP'd to a secure location of the customer's choosing.

Give Lively

Give Lively supports CSV file exports and in-admin table view of donations as well as a dashboard showcasing totality of certain stats (# of donors, donations, tickets sold, seats filled).

iRaiser

iRaiser offers pivot tables, line graphs, bar graphs, histograms, and pie charts. Organizations can select events and add filters to build the reporting they need. They can save reports for personal use or share with colleagues.

OneCause

OneCause provides the ability to report on specific campaigns, multiple campaigns, a campaign series, or all campaigns with built-in reports that can be customized, scheduled, and copied.

Report types include: online transaction details, online and offline donation reports, registration reports including custom questions for participants, teams, recruiting relationships, additional and secondary registrations, and activity reports (e.g., hosted events, pledged occasions, secondary events).

Client admin access can be limited to only reporting or reporting for specific campaigns.

For each campaign, OneCause provides a dashboard including average fundraising per participant and per team, average self-donation amount, average recruiting per participant, year-over-year progress comparison for annual campaigns for fundraising and registrations, and top prior fundraisers registered and not yet registered.

Qgiv

Qgiv provides default reports such as participant/registration, donation, team, badge, and store reports.

A TIP FROM QGIV



Map as many data points as you can so you have all the information you need for Salesforce reports and dashboards. Your strategy may change, so having the historical data you need is important.

raisin

raisin has more than 40 canned reports applicable to event data and modules within raisin. Salesforce can be used for several other reporting capabilities.

Rallybound

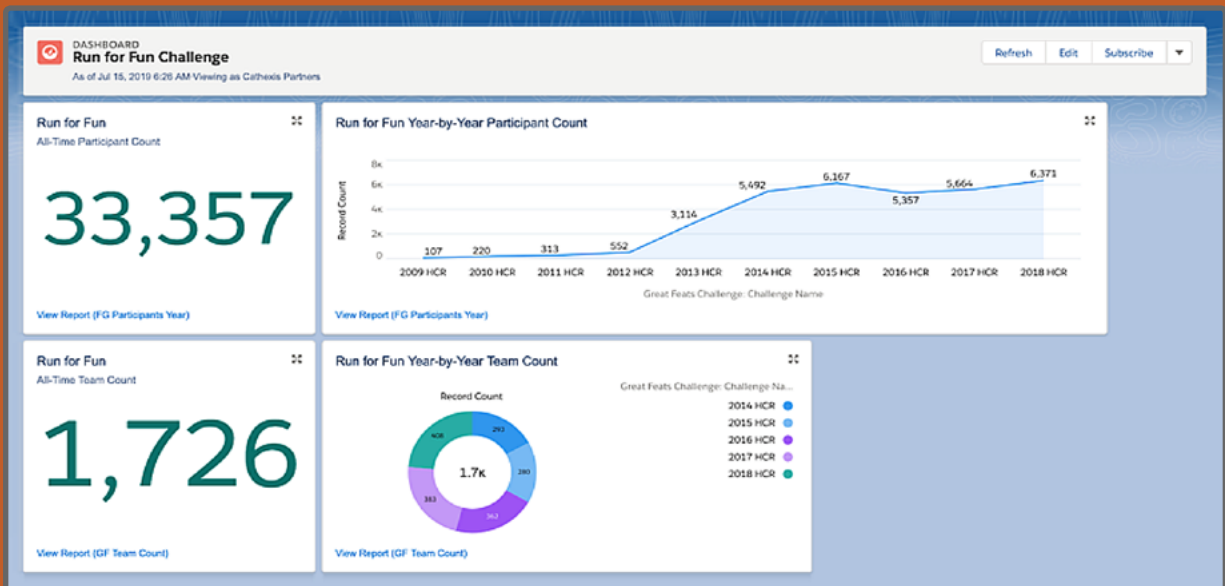
Admin Reports allows administrators to generate, view, customize, and export reports to track any element of their campaign. There are approximately 15 reports, all revolving around donation and member/fundraiser information. Admin Reports provide a tabbed interface, allowing multiple reports to be open at the same time. [Learn more.](#)

Springboard

Most reporting is done in Salesforce, as that is the “CRM of record” for most organizations using Springboard for p2p, with the most comprehensive multichannel data. The Salesforce platform offers virtually unlimited ways to view your data across objects. Within Springboard itself, you can easily see a list of personal fundraising campaigns created along with the goal and progress (which is also viewable in Salesforce).

There are many standard Salesforce reports that come with the Springboard p2p installation, which can be easily customized and turned into dashboards, including: 1) amount raised by personal campaigns and organizational campaigns; 2) personal campaign registration by campaign/category; and 3) registrants and donors by personal campaign.

SPOTLIGHT ON DASHBOARDS



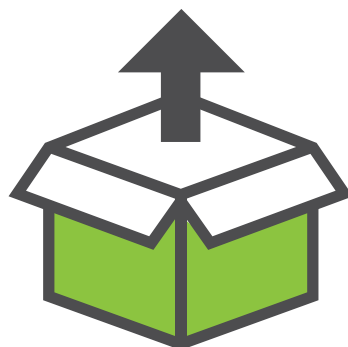
Dashboards provide a high-level overview and make it easy for staff and executive teams to highlight trends and quickly view the current state of campaign participation and fundraising. To further illustrate the usefulness of dashboards, we presented a scenario to the vendors and following are a few of their responses.

Please provide the steps required to create a dashboard that compares registration and funds raised by number of weeks out from the event, and include a comparison with the previous two years of the same event.

Classy's response:

Classy has 12 out-of-the-box reports available in Salesforce. Any of these reports can be manipulated and built into a dashboard. In this case, search by the campaign IDs of the two different events to:

- 1 Create a report for each event (Campaign), including total value won opportunities where the close date of the opportunity is X weeks prior to the Campaign start date.
- 2 For registrations, Classy provides a custom object to separately track registrations. Similar to step 1, three reports can be created to sum number of registrations by the Campaign (a lookup field on Classy's registration custom object). Again, registration date can be used to only sum registrations based on number of weeks out from the event.
- 3 The reports can then be added to a dashboard.



Springboard's response:

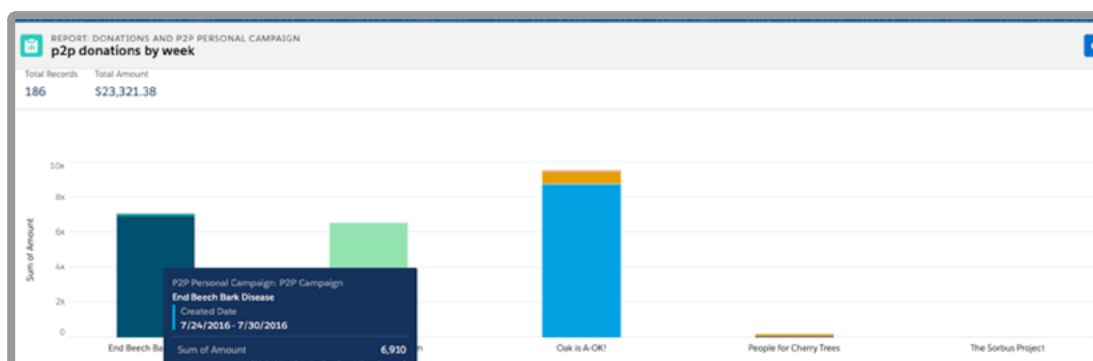
- 1 Create a matrix report using the Donations and P2P Personal Campaigns report type. This will allow you to group all the amounts raised under the different campaigns and filter by the campaigns you want to compare. Include the Sum of the Amount in the report.
- 2 Group rows by campaign and then by calendar week.

REPORT: DONATIONS AND P2P PERSONAL CAMPAIGN
p2p donations by week

186 \$23,321.38

<input type="checkbox"/> P2P Personal Campaign: P2P Campaign ↑ ▾	Created Date ↑ ▾	Sum of Amount	Record Count
<input type="checkbox"/> End Beech Bark Disease	7/24/2016 - 7/30/2016	\$6,910.00	70
	9/4/2016 - 9/10/2016	\$100.00	1
	2/24/2019 - 3/2/2019	\$40.00	4
	Subtotal	\$7,050.00	75
<input type="checkbox"/> Fund Your Favorite Program	2/24/2019 - 3/2/2019	\$970.00	4
	3/3/2019 - 3/9/2019	\$5,575.00	11
	Subtotal	\$6,545.00	15
<input type="checkbox"/> Oak is A-OK!	7/24/2016 - 7/30/2016	\$8,720.00	67
	8/28/2016 - 9/3/2016	\$50.00	4
	9/18/2016 - 9/24/2016	\$640.00	8
	3/25/2018 - 3/31/2018	\$20.00	2
	4/1/2018 - 4/7/2018	\$86.38	7
	8/19/2018 - 8/25/2018	\$20.00	2
	Subtotal	\$9,536.38	90
	Subtotal	\$100.00	1
<input type="checkbox"/> People for Cherry Trees	8/7/2016 - 8/13/2016	\$60.00	2
	9/11/2016 - 9/17/2016	\$10.00	1
	9/18/2016 - 9/24/2016	\$100.00	1
	2/24/2019 - 3/2/2019	\$10.00	1

- 3 You can then turn your report into a chart to compare how much the campaign is raising week over week.



TAKE THE NEXT STEP

Peer-to-peer campaigns are some of the most complex campaigns an organization undertakes, but they also can be the most rewarding. The more online fundraising tasks that can be handed over to a dependable p2p platform, the more time your staff will have to focus on the mission, participants, volunteers, donors, sponsors, and execution of your campaigns.

Take time to ensure the tools you put in place support the processes required for campaign success. It will save a lot of effort and frustration down the road.

Our team is here to help.

Cathexis Partners has been helping nonprofits with their peer-to-peer fundraising software and campaigns for more than a decade. We can help you find the right platform for your organization and extend it to further allow your team to focus on the details that matter most.

Let us know if you need help with platform selection, site design, Salesforce integration or customization, email and social media calendar strategy and execution, reporting and event analytics, or participant or staff support.



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