



Campaigns for Fundraising Implementation Guide



Contents

About This Guide	1
Meet Maria	1
Research and Plan	4
Discovery Sessions	4
Write Requirements	5
Prioritize	6
Establish a Campaign Naming Convention	7
Change Management	8
Set Up Campaign Access	9
Enable Access to Campaigns	9
Enable Hierarchy Fields	10
Automate the Active Checkbox	11
Campaign Hierarchies	12
What is a Campaign Hierarchy?	12
Plan your Campaign Hierarchy	12
Build a Campaign Hierarchy	14
Customize Campaigns	18
Define Record Types	18
Customize Standard Campaign Fields	19
Create Custom Campaign Fields	20
Optimize Campaigns for Users	22
Customize Campaign Layouts	24
Configure Campaign Member Status	27
Define Available Statuses for a Campaign	27
Default Campaign Member Statuses	27
Tips for Managing Status Values	28
Create Custom Campaign Member Fields	28
Exercise: Run a Fundraising Appeal	29

Identify Target Audience..... 29

Create Campaign Records..... 30

Populate Campaigns with Reports or List Views..... 32

Send Communications..... 33

Track Campaign Responses..... 33

Analyze Campaign Results..... 34

Resources..... 38

Acknowledgements..... 39

About This Guide

Congratulations! You're about to explore how Campaigns in Salesforce can help your organization keep track of essential fundraising appeals, metrics, mailing lists, events, and more. In this guide we'll walk you through planning, configuration, delivery and analysis examples that you can use to craft your own unique solution. We'll look at fundraising and event management use cases primarily.

Along the way you'll learn a lot from Maria Gutierrez, a resourceful database administrator at Mundo Sin Fronteras, a refugee aid organization. Even though Maria and Mundo Sin Fronteras are fictional, her stories, struggles, and triumphs are very real. With her help, we hope you come to better understand the concepts and what it takes to get Campaigns working at your organization.



Note

If you aren't familiar with Campaigns, a great first step to educating yourself is the short [Campaign Basics Trailhead Module](#). This module provides an overview of the type of information that can be tracked by Campaigns and the nuts and bolts of working with Campaigns. Also read [What are Campaigns and How Do They Work](#).

Meet Maria

Hola, everyone! My name is Maria Gutierrez. I am a second-generation Mexican-American. In the early 1980s, my parents immigrated from Chiapas, Mexico to escape political turmoil there and started a family in the southern United States. I was the first in my family to attend college, where I studied public administration and government policy, eventually earning my masters degree.



After graduation, I worked on immigration reform for several NGOs as a fundraiser and advocacy programs officer. I'm now the Development Director and database administrator at Mundo Sin Fronteras, a refugee aid organization that provides resettlement assistance, education, relief aid and legal representation to displaced families in the southern United States. Immigration is an important issue these days and we've seen an influx of many new donors. I was determined to steward these new donors and ensure that Mundo Sin Fronteras can continue to grow and offer its badly needed services to displaced people and families in need of help.

My organization uses Salesforce as our fundraising and constituent management platform. It was set up before I joined, and I'm now in charge of it as the so-called "accidental admin." I totally understand what that means now! I've used databases before plenty of times, but none of them had the customization options and complexity of Salesforce. About a year ago we were facing a very busy fundraising period. We needed to hire two full time staff attorneys and a second volunteer coordinator to expand our services. These were critical positions because with legal representation, immigrants are much more likely to establish the right to stay with their families in the United States than those who lack representation. Our Executive Director wanted to see our year of fundraising activities mapped out so we had a clear plan of action before us to meet our goals. That's when I learned about using Campaigns to model fundraising appeals.

The fundraising team and I spent several weeks researching and planning what the organization needed. I also did some focused learning and experimenting with Campaigns in Salesforce. After

some key decisions were made around how to organize and categorize our appeals, what custom fields were needed, and some data entry standardization, we had our fundraising model for the year. This was by no means an easy task, and took some trial-and-error, but it was worth the effort for sure.

We are now able to:

- Track each fundraising appeal, down to the mailing segment, and compare performance over time.*
- Reach out to our donor base in a timely, efficient, and repeatable manner.*
- Allow the Executive Director and Finance Director to see high-level metrics of fundraising performance on a single record.*
- Train our staff to understand which fundraising efforts and invitations to attribute gifts and event registrations to.*

I can't wait to show you what I've learned about Campaigns and how we got to where we are today. It took some time and I wasn't always sure about what I was doing—the struggle is real! I might not know everything, but our fundraising appeals are running smoother than ever and I keep learning new things.

Research and Plan

As you begin your Campaign implementation, you'll be embarking on a journey that can transform the effectiveness of your organization, and how your users interact with your database. This might sound scary, but it's also exciting! Be comfortable making mistakes—you won't learn unless you do, and that's perfectly OK.

Before you begin implementing anything, take some time to learn what your staff and your organization needs. The research and planning process typically has three phases:

- Discovery Sessions
- Write Requirements
- Prioritize

Discovery Sessions are a chance to talk to your staff about what they need, what isn't working, and what will help make them successful. Take what you've learned and **Write Requirements**—a series of concise action items that you'll perform when you implement your design. Because you probably can't do all the things people come up with, **Prioritize** your requirements and focus on what will have the most benefit to your organization.

Discovery Sessions

This process deserves plenty of time to achieve thoughtful, well-informed results. Several months of planning and research is typical. Actively solicit feedback and listen to your staff members tell you about their needs. Set up time to interview staff from all the core departments or functional teams, including individual fundraising, corporate fundraising, communications, finance, and executive leadership.

Listen and record what you're hearing. As you continue to have more conversations, notice where the patterns emerge. If you hear the same feedback multiple times, or from multiple people, it's probably something you want to include as a requirement in your design. You may not be able to accommodate every request, but you'll have a better idea of what people need and how to deliver it to them.

During our discovery process, I interviewed several staff members about how they perform their fundraising duties, where they felt pain, and what they hoped to be able to do. Going back over my notes, here are some questions I asked:

- *How do you decide which groups of constituents to send appeals to?*
- *Do you send the same messaging to all groups, or tailor specific messages for each one?*
- *What does a typical appeal process look like? What are the steps?*
- *How do you conduct a typical fundraising event? What are the steps?*
- *Does everyone get postal mail and email, or do they just get one or the other depending on their preferences?*
- *Describe the most complex appeal or event invitation you've worked on.*
- *What are the key metrics that must be reported on?*
- *What are some things that you wish you could do today, but can't or find very difficult to do?*
- *What aspects of running an appeal feel like they are a waste of time?*

I got tempted to jump straight into "here's how we can do that" but I learned that in this phase it's best to let the conversations flow and not get bogged down the details. At least not yet!

Write Requirements

Once you've completed your discovery sessions, take some time to analyze your notes and group similar requests together. Then write your requirements. You don't need to define the implementation approach, just the need you're trying to address.

The following example just describes a task. It doesn't explain why it's important or to whom:

- Create a Channel picklist field with values: Postal Mail and Email.

Instead, write the requirement more like a short story:

- Fundraising staff need to track if their appeals went out by Postal Mail or by Email.

You don't need to jump straight into the implementation approach at this point. During the planning and prioritizing phase it helps to have a common language that everyone understands instead of the "technical jargon" that only the admin understands. After everyone agrees on what the requirements are, you can focus on how to deliver them.

It's a good idea to capture all your requirements in a shareable spreadsheet so you can keep track of them, get additional feedback, and so you can sort them by priority.

After our discovery sessions, I took the answers I got and turned them into design requirements. Here's a sample of those requirements:

- *Event planners need to be able to see at a glance when an event is scheduled, where the venue is, and driving directions.*
- *Development staff need to be able see the total amount raised from a given appeal in one easy-to-find place.*
- *Finance staff must be sure that every donation is related to an appeal or fundraising event.*
- *Gift entry staff want appeals that are easy to search for in the database by name.*
- *The Development Director wants to be able to compare the performance of one mailing against another for the same fundraising appeal.*

Such fun to write those, and a relief to have something tangible at last. At this point, I started to feel like we were really getting somewhere!

Prioritize

After writing requirements, you'll need to prioritize them. A good way to approach prioritizing requirements is to decide what you **must** have versus what you **want** to have. The must-haves are all the things that the organization can't live without whereas the wants are things that are important, but can wait. You might need to do some digging to get to the heart of what is essential. It's worth the effort because you know that you're focusing your efforts on where they are needed the most. Then you can include as many of the want-to-haves as you have time for, or plan to include them in a future phase of work.



Tip

Try numbering your requirements in order of priority, or simply mark each requirement you plan to implement with a check mark.

Now that we had a complete set of requirements written, we had to decide which ones we were going to do first, which ones were for later on, and which ones we weren't going to do at all. After all the fun of drafting requirements, things got a little heated when the staff and I had to pick which ones we were going to do! Of course, everyone wants their own ideas implemented first. In these conversations, it helped to talk about the decision in terms of what was best for the organization and that some compromise would be necessary. Innovation is saying no sometimes.

Sorry finance team, we'll get that flashing dollar sign icon built eventually! :-)

Establish a Campaign Naming Convention

The names you give your Campaigns are of particular importance. Your users locate Campaigns with global search and with lookup relationships by searching for the Campaign Name. Craft a standardized naming format, use it consistently, and check your Campaign names periodically to ensure users are following the format.

Use meaningful and easily readable names, not abbreviations and codes. For example, if your Campaign names look like this:

- AFTEFY19
- 080818-KY-NS
- T81MI

Consider changing them to this:

- FY19 Membership Appreciation Dinner
- Membership 2018 - Renewals
- Year End Ask 2017 - Generic Mailer

Sometimes it's hard to avoid using Campaign names that aren't terribly descriptive because you have migrated data from an older system or have integrations with third-party tools that dictate your Campaign names. Do what you can and try to move toward using more descriptive names where possible. You can also use the Description field to capture what the Campaign is for.

My fundraising staff and I looked at the kinds of appeals and events we typically run throughout the year and talked about what aspects of those would be essential to find in the Campaign Name. We agreed that the purpose and date were the two most important things followed by a short descriptor, when necessary, to further define what the Campaign represents.

Here's a few examples:

- *Spring Fund Drive 2018*
- *Spring Fund Drive 2018 - Existing Donors*
- *Noche Familia 2018 - General Invitations*

As you'll see later on, the naming convention is also informed by the level of the Campaign within a Campaign hierarchy.

Change Management

The research and planning process isn't easy and it's tempting to race towards a state of being "done." However, organizations undergo constant change, priorities shift, and as time goes on, you and your staff learn more about your fundraising processes and how they map to Salesforce. Be open to change and building a better organization as a way of life instead of an end goal. Taking it slow and being deliberate is time well spent because what you implement will be more meaningful and useful in the long run.

It's also worth recognizing that when you implement new information technology, you're also asking **people** to change how they work. This can feel disorienting or even threatening. In most cases, those reactions are because of the change in what's familiar to someone. As a compassionate database administrator, look for ways to preserve some of that familiarity. Little things like how you label fields, where they appear on the screen, and how you write help text, all go a long way.

Set Up Campaign Access

Before you can begin working with Campaigns, make sure that you have access to manage Campaigns. Yes, even as a System Administrator, you may need to take action here!



Note

This guide is written for organizations using Lightning Experience. If your organization is using Salesforce Classic, you can still learn a lot here but some of the features discussed and screenshots used will be different.

Enable Access to Campaigns

Check the [Marketing User checkbox](#) on every User record for staff who need to edit, create and delete Campaigns. By default, all users can view Campaigns.

1. In **Setup**, enter `users` in Quick Find.
2. Click **Users**, then click **Edit** next to your username.
3. Check the **Marketing User** checkbox, if it isn't already checked.
4. Click **Save**.

Role	
User License	Salesforce
Profile	Fundraising and Development
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>

Repeat these steps for all other users who need to manage Campaigns.



Important

Adjust [object-level permissions on the Campaign object](#) for all relevant profiles. The Marketing User checkbox only grants permission to manage Campaigns. The object-level permissions define the specific Create, Edit, and Delete permissions.

Enable Hierarchy Fields

Campaign hierarchies allow you to see the total fundraising, total number of respondents, total budget, and other metrics at any level of your Campaign hierarchy. You'll learn about hierarchies later in this guide, but before you can use this valuable feature, you need to enable a set of fields. Yes—even for users with the System Administrator profile!

Here's the list of fields you need to enable on the Campaign object for any users who need access to them. In general, that should be everyone who regularly works with Campaigns:

- Num Sent in Hierarchy
- Budgeted Cost in Hierarchy
- Actual Cost in Hierarchy
- Leads in Hierarchy
- Converted Leads in Hierarchy
- Contacts in Hierarchy
- Opportunities in Hierarchy
- Won Opportunities in Hierarchy
- Value Won Opportunities in Hierarchy
- Value Opportunities in Hierarchy
- Responses in Hierarchy

That's a lot of fields—let's use a [permission set](#) to make enabling these fields for multiple users a little easier. A permission set allows you to assign permissions directly to users instead of having to edit each of their profiles. If you haven't used permission sets previously, familiarize yourself before you complete this section of the Campaign setup.

Here's a summary of the steps:

1. Create a permission set. Name it something like `Campaign Hierarchy Fields`.
2. Configure the permission set so that the "in Hierarchy" fields you plan to use have **Read Access** enabled. Feel free to pick which fields are right for your organization and skip the rest.
3. Assign the permission set to users who should have access to those fields.

**Note**

This permission set only enables field-level security. You can choose to enable access to the Campaign object, its tab, record types, and page layouts either within user profiles, or within the permission set.

Now that your users have access to the "in Hierarchy" fields, you may need to arrange the fields on your Campaign page layouts. Here's a sample layout with all the hierarchy fields displayed:

Campaign Hierarchy Information	
Contacts in Hierarchy	Opportunities in Hierarchy
20	11
Leads in Hierarchy	Value Opportunities in Hierarchy
13	\$675,125
Converted Leads in Hierarchy	Won Opportunities in Hierarchy
0	6
Actual Cost in Hierarchy	Value Won Opportunities in Hierarchy
\$98,000	\$670,000
Budgeted Cost in Hierarchy	Num Sent in Hierarchy
\$100,000	40,000
Expected Revenue in Hierarchy	Responses in Hierarchy
\$5,500,000	16

Automate the Active Checkbox

The Active checkbox on Campaigns controls which Campaigns appear in reports and list views that are filtered to show only active Campaigns. The idea is that you don't want inactive Campaigns cluttering up your reports and list views. Think of it as a way to "archive" a Campaign record. Sounds simple enough, but the box isn't checked automatically when you create a new Campaign. It's all too easy to forget to check it yourself, so we recommend that you create automation with [Process Builder](#) to check the box for you.

The process should use the following settings:

- Start the process only when a record is created.
- Use Active equals False for the action execution criteria.
- Create an immediate action that updates Active to True.

Campaign Hierarchies

What is a Campaign Hierarchy?

Fundraising appeals and fundraising events are rarely a one-off venture. Appeals often target many segments of your existing or potential donor base and event invitation lists are comprised of different groups of constituents. Salesforce provides a way to group related outreach efforts together using a Campaign hierarchy.

A Campaign hierarchy is a group of related Campaigns associated with one another via the Parent Campaign field.

Campaigns arranged into hierarchies accomplish two things:

- Roll up the amount of money raised, number of people engaged, return-on-investment, and other metrics to higher levels of the hierarchy.
- Categorize Campaigns from broad classifications into increasingly more specific subdivisions.

Plan your Campaign Hierarchy

It's easy to create a hierarchy and make changes to it as needed. However, there's a bit of strategy you need to employ to get the most out of your design. It's time to incorporate some feedback you got during the discovery sessions. Try drawing a diagram or outline your desired Campaign hierarchy to help visualize how the levels relate to one another. Share the mockup with key staff members to validate that you're headed in the right direction.

I spent some time looking at previous appeal and invitation mailings to understand how those lists were compiled. What groups of constituents were routinely contacted? Was there only one mailing, or were there follow up mailings? I confirmed with my fundraising staff that I understood these things correctly and that they knew I wasn't missing something important. This information helped me to map out our hierarchy. More on that in a minute!

There is no wrong way to create your Campaign structure. The goal is to find the structure that works best for your organization. It's going to take some time and some

experimentation to figure it out. Like Reports, Campaigns need to be well-curated and maintained by someone in your organization.

Although it's possible to go up to five levels deep, I decided to start simple and limit the number of levels to three. First is the fiscal year, then the appeal or event invitation, and then each specific mailing. That way, the hierarchy is easy for us to understand and easier for staff to use.

You might be wondering why we chose to use fiscal year as the top level of the hierarchy. It's so we can accommodate year-end giving. We can group donations into a single recognition year, even if the donation was received in the following year.

**Tip**

Many organizations use just one hierarchy for their fundraising but you can choose to create several if you wish. For example, it may make sense to create one hierarchy for your annual fund and another for a capital campaign, grantseeking, or other special funds.

Here are some additional design considerations:

- Salesforce allows up to five levels in a Campaign hierarchy. Although some organizations use more levels, we find that most use either two or three. Organizations that do peer-to-peer fundraising or highly segmented mailings may need additional levels.
- If you create a hierarchy level that acts as a category alone, consider capturing the same information as a custom field, Campaign Type, or even as part of your Campaign naming convention. For example, a hierarchy level only used to capture a broad gift category such as Individual, Corporate, and Major Gifts could also be captured in a custom picklist field. It's a balance sometimes so you may have reasons, such as convenience for non-technical users, to create a level like this.
- Create an "Unsolicited" campaign, not tied to any specific appeals, that you can use to track gifts where you really don't know what the source was. People sometimes give to organizations without responding to an appeal.
- Some third-party online donation and event registration tools may impose some constraints on how you design your hierarchy. Get familiar with how these tools operate and interact with Campaigns as you design your hierarchy structure.

Build a Campaign Hierarchy


So how do you actually create a hierarchy? All you need to do is populate the Parent Campaign field with another Campaign. When you do this, you create a relationship between two Campaigns where one is the "parent" and the other is the "child" Campaign.

Let's look at an example:

- 1. Create these Campaigns:
 - a. **Name** = Annual Fund 2019
 - b. **Name** = Summer Fundraising Appeal 2019
 - c. **Name** = Winter Fundraising Appeal 2019
- 2. Set the **Parent Campaign** of the Winter and Summer Fundraising Appeal 2019 to Annual Fund 2019.
- 3. Navigate to the Annual Fund 2019 record and click the **Related** tab. Notice that you can see both the appeal Campaigns listed in the Campaign Hierarchy related list.

Details

Related

 Campaign Hierarchy (2)

CAMPAIGN NAME	CONTACTS IN HIE...	OPPORTUNITIES I...	VALUE OPPORTUN...
Summer Fundrai...	0	0	\$0
Winter Fundraisi...	0	0	\$0

[View All](#)

In this structure, Annual Fund 2019 is at the top of the Campaign hierarchy. All fundraising appeals and events that occur in fiscal year 2019 will use Annual Fund 2019 as the Parent Campaign and all fundraising metrics roll up to this one, single record. It's an easy, convenient way to see your fundraising progress in one place!

The Summer and Winter Fundraising Appeals are at the second level of the Campaign hierarchy. These records capture the fundraising metrics for all mailings related to one appeal.

Now let's say that you want to send different versions of solicitation letters to different constituent groups. Create another level in your Campaign hierarchy to capture these details. Here are the steps to follow:

1. Create these Campaigns:
 - a. **Name** = Winter Fundraising Appeal 2019 - Existing Donors
 - b. **Name** = Winter Fundraising Appeal 2019 - Lapsed Donors
 - c. **Name** = Winter Fundraising Appeal 2019 - Prospective Donors
2. Set the **Parent Campaign** of each of these Campaigns to Winter Fundraising Appeal 2019.
3. Navigate to the Annual Fund 2019 record, click the **Related** tab, then click **View All** in the Campaign Hierarchy related list. Notice that you can see all levels of the Campaign hierarchy.

CAMPAIGN > ANNUAL FUND 2019	
Campaign Hierarchy	
CAMPAIGN NAME	
▼ Annual Fund 2019	CURRENT
Summer Fundraising Appeal 2019	
▼ Winter Fundraising Appeal 2019	
> Winter Fundraising Appeal 2019 - Existing Donors	
Winter Fundraising Appeal 2019 - Lapsed Donors	
Winter Fundraising Appeal 2019 - Prospective Donors	

Create Campaigns at any level in your hierarchy simply by deciding which Parent Campaign to relate it to. You can also change Campaign relationships at any time by updating the Parent Campaign field. Nothing is set in stone!

Let me show you the details of our three-level Campaign hierarchy, including some decisions about how gifts should be entered and how the lists would be created. This is actually from a user guide I created for my fundraising staff to follow so they always know which Campaigns to relate Opportunities and Campaign Members to.

For Appeals

Level	Example Campaign	Donations	Campaign Members
First	Annual Fund 2019	No	No

Level	Example Campaign	Donations	Campaign Members
<i>Second</i>	<i>Summer Fundraising Appeal 2019</i>	Yes	No
<i>Third</i>	<i>Summer Fundraising Appeal 2019 - Existing Donors</i>	No	Yes
<i>For Fundraising Events</i>			
Level	Example Campaign	Donations	Campaign Members
<i>First</i>	<i>Annual Fund 2019</i>	No	No
<i>Second</i>	<i>Noche Familia 2019</i>	Yes	Yes
<i>Third</i>	<i>Noche Familia 2019 - General Invitations</i>	No	Yes
<p><i>There's a slightly different methodology for fundraising events. The second level Campaigns contain both the donations received at the event and the RSVPs (Campaign Members). The third level also contains Campaign Members, but only to produce the mailing lists.</i></p> <p><i>I sometimes describe Campaigns in terms of outgoing activities and incoming activities. For example, event invitation lists are third-level Campaigns and represent an outgoing activity. We export mailing list data to spreadsheets and use them for the postal mail and email event invitations.</i></p> <p><i>The Noche Familia 2019 event Campaign is a second level Campaign and represents incoming activities. The donations and event RSVPs are collected within this Campaign.</i></p> <p><i>The Annual Fund 2019 Campaign is a first-level Campaign and is neither an incoming nor an outgoing Campaign. It's used to aggregate all the activities within the hierarchy up to one record.</i></p>			

Some organizations choose to use a fourth or even fifth level in their Campaign hierarchy. For example, you might use those deeper levels if you wanted to test different mailings within a constituent segment or group. This level of detail is generally useful only if your

organization invests the time and money to analyze the results of different messaging or outreach tactics within a segment.

Customize Campaigns

A successful Campaign deployment may require a fair amount of configuration. This can include customizing record types, fields and picklist values, various layouts, and more. If you're already actively using Campaigns and wish to change things—never fear. You can still make changes, although you may need to make them incrementally over time so as not to disrupt ongoing business operations.

Define Record Types

Depending on your specific Salesforce configuration (NPSP, EDA, Enterprise Edition), you may already have record types defined for Campaigns.

1. In **Setup**, click **Object Manager**, then **Campaign**.
2. Click **Record Types** to view what types already exist. For example, these are the record types we include in new NPSP Trials:

Record Types		
4 Items, Sorted by Record Type Label		
RECORD TYPE L...	DESCRIPTION	ACTIVE
Event	Use this Record Type for Events	✓
Fundraising	Use this Record Type for fundraising activities	✓
General	Use this Record Type to create lists of people	✓
Marketing	Use this Record Type for outreach	✓

3. To create a new record type for your fundraising activities, click **New**.

You can also create record types for other kinds of activities such as for newsletter mailing lists or volunteer events.

For fundraising, we recommend using a single record type. You can call it Fundraising or something similar. Given that there are many other ways to categorize your Campaigns, it's usually not necessary to create additional record types for different kinds of fundraising. However, you may wish to create record types for other outreach activities such as a newsletter mailing list, advocacy campaigns, and so forth.

Customize Standard Campaign Fields

Your research and planning process should uncover some specific customizations you want to make on your Campaign records. While every organization will have a different list of those requirements, below are some common customizations that most organizations find useful. Feel free to take or leave what you will!

Categorize Your Campaigns

Use the **Type** field to categorize your Campaigns. Common Type values include:

- Fundraising Appeal
- Appeal Mailing
- Fundraising Event
- Event Invitation
- Clothing/Food Drive
- Parent (indicates that the Campaign is a Parent Campaign at the top of the hierarchy)

You can also define types for activities not related to fundraising such as advocacy, volunteerism, newsletter mailings, and more. Be sure to assign the picklist values to appropriate Campaign record types.



Note

Salesforce comes with several Campaign Type values already defined that you should deactivate if they aren't useful for your organization. These values include: Webinar, Trade Show, Banner Ads, and so forth.

Track Campaign Progress

Use the **Status** picklist field. Change, add to, or delete picklist values as needed. The **Status** field is informational only and doesn't affect the functionality of the Campaign in any way. Your Campaigns don't become inactive if the Status is set to Completed or Cancelled, for example.

Track Fundraising Goals

Change the **Expected Revenue** field label to `Campaign Goal`. That way the field has a more intuitive name and its purpose is clearer. If you set the goal amount at the top of the

hierarchy, you can compare it to **Value Won Opportunities in Hierarchy**. You can also choose to set an amount at every level if you wish.

Create Custom Campaign Fields

Track Outbound Communications by Channel

Create a custom `channel` picklist field and include values like:

- Direct Mail
- Email
- Social Media
- Phone Bank

Be sure to [assign the picklist values](#) to appropriate Campaign record types.

If you need to track the details of what went out in different mailings, create a `Mailing Details` long text field.

Track Reports Used to Add Members to Campaigns

Reports are a common way to add Leads or Contacts to a Campaign using the Add to Campaign button. To keep track of what report or reports were used to populate the Campaign, do one of the following:

- Create a custom URL field called `Report URL`. Copy and paste the URL of the report you used into this field.
- Create a custom long text field called `Campaign Source Details`. Use the long text field to copy and paste several report URLs, or to record the details of the list source as descriptive text.

Track Event Information

You can create custom fields to help you track important information about your events. Here are some commonly used custom fields (and their field type) for event Campaigns:

- Event Start Time (Time)
- Event End Time (Time)
- Event Location (Text)
- Venue Name (Text)
- Venue Contact (Text or Contact Lookup)

- Directions Information (Long Text)
- Parking Details (Long Text)

**Tip**

If certain staff members should only see these event-related fields, [create a page layout](#) for your event Campaigns and assign it to their user profiles.

Track Amount to Goal

You can create a custom field that helps you see how much more you need to raise to hit your Campaign goal. This field is available in Trial orgs created after August 25, 2020; existing orgs can create it using these values:

- Field Label: Amount to Goal
- Field Name: Amount_To_Goal
- API Name: Amount_to_Goal__c
- Description: Formula field showing the Amount left towards the Campaign's Expected Revenue
- Help Text: Formula field showing the Amount left towards the Campaign's Expected Revenue
- Data Type: Formula
- Decimal Places: 2
- Formula: `IF(NOT(ISBLANK(ExpectedRevenue)), ExpectedRevenue - AmountWonOpportunities, 0)`

Create Additional Custom Fields

You will no doubt have at least a few pieces of information that you need to track about your Campaigns that are unique to your organization. The flexibility of Salesforce makes this easy, but there is an [art to good data model design](#). For example, field names convey important information to your users about the purpose of each field. Choosing the field type, making the field required or not, adding help text, and other configuration options all affect the utility of your custom fields.

Optimize Campaigns for Users

Help Gift Entry Staff Locate the Correct Campaign

Even if you're rigorous about naming your Campaigns in a very standardized way, it can sometimes be difficult for staff doing data entry to find the correct Campaign. As with all lookup fields in Salesforce, you must [search by using the name of a record](#). So, if you have Campaigns that use similar names year after year, users may have a hard time finding the correct Campaign and run the risk of associating donations to the wrong one!

As an admin you can [define a lookup filter](#) on the Opportunity's Primary Campaign Source field to help focus your users on the Campaigns they should be using. For example, you might filter the lookup to only find Campaigns with a Start Date in the current year. Or you could define criteria that filters Campaigns by user Profile so fundraisers only see fundraising Campaigns and event coordinators only see events. Get creative!



Note

A full lookup search will include all text fields along with Name. So if you happen to have important data in the Description field or a custom text field, you can find it. Lookups can't search other types of fields like number fields, data fields, or picklist fields.

As part of your Campaign strategy, it's a good practice to only assign Opportunities to one level of the Campaign hierarchy. Often, that will be one of the lowest levels in the hierarchy such as the name of the appeal itself or individual mailing segments.

Ensure You Enter Date Information

Always populate the **Start Date** field. That way you have date information you can report on, use with list views, and use programmatically. Additionally, you can populate the **End Date** field. It's ok if you don't have exact dates. Select the first day of the month that your Campaign is in, if it doesn't have a specific start date. That way you at least have a month and year that you can report on.

Also, consider making **Start Date** a required field to ensure there's always data in this field.

Ensure Every Donation has a Corresponding Campaign

It's very important that all gifts coming to your organization have a corresponding Campaign. That way you can accurately track and analyze your fundraising appeal efforts. Consider making the **Primary Campaign Source** field on Opportunities required.

Track Donations Not Related to Specific Appeals

Sometimes donors just feel generous, love your mission, and surprise you with a donation. Consider creating an "Unsolicited" Campaign to capture gifts that you can't tie back to a specific appeal. The unsolicited Campaign should still be part of your Campaign hierarchy so those donations roll up to the top-level Campaign.

Show What Level a Campaign Is in the Hierarchy

Once you start building up a lot of Campaigns and really fleshing out your Campaign hierarchy, it can get confusing keeping track of where all those Campaigns fit into your hierarchy. Consider creating a picklist field called `Campaign Level` so that when you view a Campaign record, it shows its hierarchy level.

If you'd like, go one step further and create instead a formula field to automate Campaign Level. Here's a formula you can use. Configure the formula as a Text type field:

```
IF(ISBLANK(Parent.Id), "Level One",
IF(AND(NOT(ISBLANK(Parent.Id)), ISBLANK(Parent.ParentId)), "Level Two",
IF(AND(NOT(ISBLANK(Parent.Id)), ISBLANK(Parent.Parent.ParentId)), "Level Three",
IF(AND(NOT(ISBLANK(Parent.Id)), ISBLANK(Parent.Parent.Parent.ParentId)), "Level Four",
IF(AND(NOT(ISBLANK(Parent.Id)), ISBLANK(Parent.Parent.Parent.Parent.ParentId)),
"Level Five",
null))))
```

This formula looks at the hierarchy and automatically displays the Campaign's level.

If you liked that one, you can create another formula that tells you which Campaign is at the top of the hierarchy. This is especially useful if you have multiple hierarchies. Create a formula called Top Level Campaign (text-type as well):

```
IF(ISBLANK(Parent.Parent.Parent.Parent.Name),
IF(ISBLANK(Parent.Parent.Parent.Name),
IF(ISBLANK(Parent.Parent.Name),
IF(ISBLANK(Parent.Name),
Name,
Parent.Name),
Parent.Parent.Name),
Parent.Parent.Parent.Name),
Parent.Parent.Parent.Parent.Name)
```

Track the Influence of Multiple Campaigns

When a person responds to a donation, they are often influenced by more than one communication from your organization. An active donor might receive an appeal email, an appeal letter, and see a post on social media asking them to donate. With an optional feature called [Customizable Campaign Influence](#), Salesforce automatically associates multiple Campaigns to a single donation. You can set a timeframe during which a Campaign is considered influential, and add or remove Campaigns manually.

Configuring Customizable Campaign Influence can be complex. Read the documentation, take your time, and above all, **test in a sandbox first!**

Define Sharing Rules (Optional)

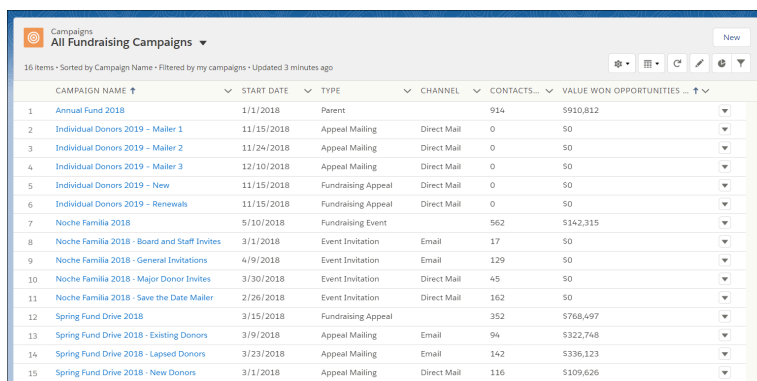
You may wish to define [Sharing Rules](#) if you want users to access only certain Campaign records. For example, you might want to allow volunteer managers to access only volunteer-related Campaigns and not any fundraising Campaigns and vice versa. This step is purely optional and depends on the requirements of your organization and your users.

Customize Campaign Layouts

After you've had a chance to create custom fields for your Campaigns, it's time to define list views, search layouts, and page layouts. These layouts help your staff easily find and sort Campaigns.

Customize List Views

A good place to start is to create a list view called All Fundraising Campaigns. Filter the list view to include only the Fundraising record type. Next, define columns for the list view that are most important for fundraising. Here's an example:



	CAMPAIGN NAME	START DATE	TYPE	CHANNEL	CONTACTS...	VALUE WON OPPORTUNITIES ...
1	Annual Fund 2018	1/1/2018	Parent		914	\$910,812
2	Individual Donors 2019 - Mailer 1	11/15/2018	Appeal Mailing	Direct Mail	0	50
3	Individual Donors 2019 - Mailer 2	11/24/2018	Appeal Mailing	Direct Mail	0	50
4	Individual Donors 2019 - Mailer 3	12/10/2018	Appeal Mailing	Direct Mail	0	50
5	Individual Donors 2019 - New	11/15/2018	Fundraising Appeal	Direct Mail	0	50
6	Individual Donors 2019 - Renewals	11/15/2018	Fundraising Appeal	Direct Mail	0	50
7	Noche Familia 2018	5/10/2018	Fundraising Event		562	\$142,315
8	Noche Familia 2018 - Board and Staff Invites	3/1/2018	Event Invitation	Email	17	50
9	Noche Familia 2018 - General Invitations	4/9/2018	Event Invitation	Email	129	50
10	Noche Familia 2018 - Major Donor Invites	3/30/2018	Event Invitation	Direct Mail	45	50
11	Noche Familia 2018 - Save the Date Mailer	2/26/2018	Event Invitation	Direct Mail	162	50
12	Spring Fund Drive 2018	3/15/2018	Fundraising Appeal		352	\$768,497
13	Spring Fund Drive 2018 - Existing Donors	3/9/2018	Appeal Mailing	Email	94	\$322,748
14	Spring Fund Drive 2018 - Lapsed Donors	3/23/2018	Appeal Mailing	Email	142	\$336,123
15	Spring Fund Drive 2018 - New Donors	3/1/2018	Appeal Mailing	Direct Mail	116	\$109,626



Tip

It's a good practice to limit the number of columns in your list view to six. Too many columns can be confusing to look at and you can't see the column headers easily either.

Now create additional list views. Some ideas you can use are:

- Recent Fundraising Campaigns

- Upcoming Fundraising Events
- All Level One (or Level Two) Campaigns

Customize Search Layouts

To help you and your users easily find Campaigns, customize the Search Layouts for Campaigns. [Search Layouts](#) determine the fields that are displayed in global search results and in lookup dialog boxes. For example, when you search for the word `mailer` in global search or in a lookup field like Primary Campaign Source on an Opportunity, you're presented with a list of results. Search Layouts allow you to define what fields are displayed here.

Here's an example of a lookup search with a customized layout:

Primary Campaign Source					
Primary Campaign Source					
<input type="text" value="mailer"/>					
Campaigns					
4 Results - Sorted by Relevance ▾					
CAMPAIGN NAME	START DATE	TYPE	CHANNEL	CONTACTS IN CAMPAIGN	WON OPPORTUNITIES IN CAMPAIGN
Noche Familia 2018 - Save the Date Mailer	2/26/2018	Event Invitation	Direct Mail	162	0
Individual Donors 2019 - Mailer 1	11/15/2018	Appeal Mailing	Direct Mail	0	0
Individual Donors 2019 - Mailer 3	12/10/2018	Appeal Mailing	Direct Mail	0	0
Individual Donors 2019 - Mailer 2	11/24/2018	Appeal Mailing	Direct Mail	0	0

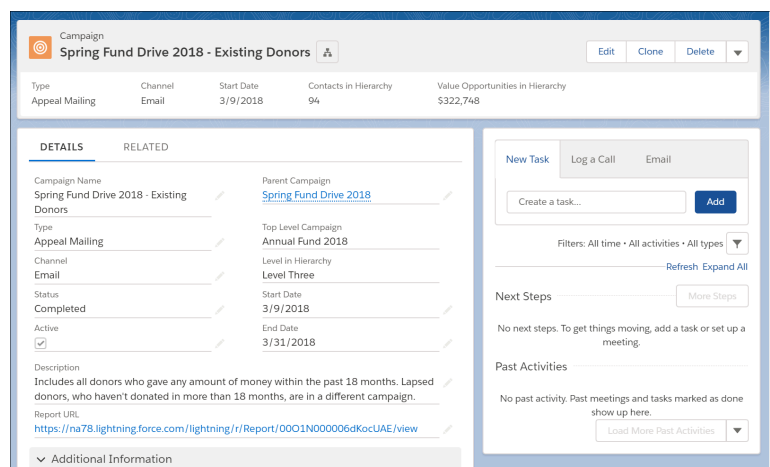
Customize Page Layouts

Customize your Campaign page layouts to work the best way possible for your users. Use page layouts to:

- Prioritize critical information toward the top of the layout
- Group similar fields together
- Simplify layouts for certain users

You can organize your layouts in any number of ways, and it may take some time and feedback from your staff before you've settled things.

Here's an example of the top section of a Campaign page layout:



Compact layouts define what information appears in the header of a record detail page. In the example above, Type, Channel, Start Date, Contacts in Hierarchy, and Value Opportunities in Hierarchy are displayed. [Customize your Campaign compact layout](#) to surface the most important information right at the top of the page.

Configure Campaign Member Status

Track the engagement of every Campaign constituent using Campaign Member records. A Campaign Member record links a Lead or Contact to a Campaign, and includes a field for that person's status within the Campaign. For example, when you identify the people you're targeting for a fundraising appeal and add the Contacts to a Campaign, the Member Status might be Sent, meaning that you have (or are about to) send some form of mailing to that person. If they never respond, then they stay in the Sent status. If they do respond, by making a donation or registering for an event, then their status changes to Donated, Responded, RSVP-YES, or some other value.

Define Available Statuses for a Campaign

Define the statuses available for a given Campaign by clicking **New** in the Campaign Member related list. Here you can enter a new value, delete a value, change a value, and define which values count as a response using the Responded checkbox. The checkbox defines which Campaign Member Statuses count toward the Responses in Campaign and Responses in Hierarchy fields. Simply labeling a Status as "Responded" doesn't populate those fields.

Use **Change Default Status** to change the default status for the Campaign.

Default Campaign Member Statuses

Each new Campaign comes with two Campaign Member Statuses predefined for you: Sent and Responded. For many organizations, that's enough. You just want to track who was sent a solicitation and then who responded to it. You can choose to change the names of these values to anything you want and add additional values. Very often for Campaigns used to track event registration, event planning staff create values like: Invited, RSVP Yes, RSVP No, Cancelled, Attended, and No Show.

I periodically review the Status values in use and make sure they are consistent across the whole organization. Sometimes users will create new ones without realizing that we already have a value for

that! A summary report of Campaign Member Status helps a lot here.

Tips for Managing Status Values

As an admin, it's best if you keep the list of Campaign Member Statuses short. If you're using two terms that mean the same thing, combine them into one. RSVP No and Not Attending could be an example. Also watch out for variable ways of spelling the same status such as Donor and Donated. Implement policies and procedures at your organization that help control who has access to create new Status values and be sure they understand the desired structure you want to keep in place. It may help to create a dictionary of sorts that outlines all the values that should be used and what kinds of Campaigns they should be used for. One common approach is to map Campaign Member Status to Campaign Type. For example:

Campaign Type	Available Member Statuses
Appeal	Sent, Donated
Event	Invited, RSVP Yes, RSVP No, Attended, Cancelled, No Show



Note

There is no way to set the values available in all Campaigns centrally. There are some third-party apps that can do this for you however.

Create Custom Campaign Member Fields

You can create custom fields for the Campaign Member object just like you can for other objects. Sometimes it makes sense to create fields to track specific event registration details on a per-person basis. A couple of common custom fields you can create are:

- A text or picklist field called `Role`. Role is useful because member Status is often used to track the attendance status. With Role you can specify what the person's role at the event is. For example: Attendee, Speaker, Sponsor, and so on.
- A number field called `Number of Guests`. Your constituents may bring guests to your events who have not formally registered. Use Number of Guests to keep track of the total number of people coming to your events.

Exercise: Run a Fundraising Appeal

In this section, with the help of Maria, we're going to walk you through an end-to-end exercise where you'll set up some Campaigns, add Campaign Members, do some mock gift entry, and report on the results. Since you'll be creating several test records, you may wish to use a sandbox instead of your production instance.

There are six steps involved in completing a fundraising Campaign. We recommend that you follow these steps for each of your Campaigns:

1. [Identify Target Audience](#)
2. [Create Campaign Records](#)
3. [Populate Campaigns with Reports or List Views](#)
4. [Send Mailings](#)
5. [Track Campaign Responses](#)
6. [Analyze Campaign Results](#)

Let's work through an example appeal Campaign. Feel free to follow the steps exactly or use your own ideas.

Identify Target Audience

Before you create Campaign records, it's a good idea to understand who your target audience is. Most fundraising appeals and event invitations are composed of many constituent segments. Take some time to map out what all those segments are so that you know how many Campaign records you need to create.

Here are some examples of segments you might choose to target:

- Current Donors
- Lapsed Donors
- Potential Donors
- Major Donors
- Board Members & Staff

At Mundo Sin Fronteras, one technique we like is to use previous Campaigns as the source for building new Campaign lists. For example, we often want to make sure that everyone who got the invitation to our last event gets the next one. You can easily run a Campaigns with Campaign Members report and choose one or more Campaigns. Then add all the members to a new Campaign and you're all done! Then we run additional reports to include anyone who is new to the organization, or who also needs the invite. It works great!

**Tip**

NPSP includes several reports that you can use or customize to help you identify your mailing segments. Take a look at the NPSP 3.0 Donor Management Reports folder for some ideas.

Create Campaign Records

Let's say that you choose to target your Current Donors, Lapsed Donors, and Potential Donors. That's three Campaigns, but you'll also need one for the parent appeal Campaign.

Create the Parent Campaign first, using this field data:

- **Name** = Summer Fundraising Appeal 2018
- **Type** = Fundraising Appeal
- **Channel** = Direct Mail
- **Status** = Planned
- **Active** = True
- **Start Date** = 6/1/2018
- **End Date** = 8/31/2018

Create the child mailing segment Campaigns next:

- Create three Campaigns. For **Name**, enter:
 - Summer Fundraising Appeal 2018 - Current Donors
 - Summer Fundraising Appeal 2018 - Lapsed Donors
 - Summer Fundraising Appeal 2018 - Potential Donors
- **Type** = Appeal Mailing

- **Channel** = Direct Mail
- **Status** = Planned
- **Active** = True
- **Start Date** = 6/1/2018
- **End Date** = 8/31/2018
- **Parent Campaign** = Summer Fundraising Appeal 2018

When you've finished your appeal mailing Campaigns should look about like this:

The screenshot shows the 'Campaign' record for 'Summer Fundraising Appeal 2018 - Current Donors'. The record is categorized as 'Appeal Mailing' with a 'Channel' of 'Direct Mail', 'Start Date' of '6/1/2018', 'Contacts in Hierarchy' of '0', and 'Value Opportunities in Hierarchy' of '50'. The 'DETAILS' tab is active, showing fields for Campaign Name, Type, Channel, Status, Active, Parent Campaign, Top Level Campaign, Level in Hierarchy, Start Date, and End Date. The 'Active' checkbox is checked.

Navigate to the Summer Fundraising Appeal 2018 Campaign, click **Related**, then click **View All** in the Campaign Hierarchy related list. The hierarchy should look like this:

The screenshot shows the 'Campaign Hierarchy' for 'Summer Fundraising Appeal 2018'. The hierarchy is displayed as a list of campaigns under the 'CAMPAIGN NAME' header. The first item is 'Summer Fundraising Appeal 2018' with a 'CURRENT' status. Below it are three sub-campaigns: 'Summer Fundraising Appeal 2018 - Current Donors', 'Summer Fundraising Appeal 2018 - Lapsed Donors', and 'Summer Fundraising Appeal 2018 - Potential Donors'.



Note

In this example, we're just using the default Sent and Responded Campaign Member Status values. For fundraising events, the parent Fundraising Event Campaign typically has Statuses like RSVP Yes, RSVP No, Attended, Cancelled, and so forth. Review [Configure Campaign Member Status](#) for more information.

Populate Campaigns with Reports or List Views

Now that you've created your Campaign structure, you're ready to populate the Campaigns with Campaign Members. While you can add Campaign members [one at a time](#) or [in small groups](#), it's a common practice to use a report or list view to add many members at once.

Let's populate the `Potential Donors Campaign` using a simple report. Note that you could also use a list view if you wish. In this example, we're going to use field data from the Nonprofit Success Pack (NPSP). If you aren't using NPSP, use different report criteria.

1. Create a **Contacts & Accounts** report.
2. In **Filters**, use the following criteria:
 - a. **Show Me** = All Accounts
 - b. **Created Date** = All Time
 - c. **Total Gifts** = \$0.00
 - d. **Do Not Mail** = False
3. **Save & Run** the report.
4. Click **Add to Campaign**.
5. For **Campaign**, select `Summer Fundraising Appeal 2018 - Potential Donors`.
6. Select `sent` for **Member Status** and `Keep existing Member Status`.
7. Click **Submit**.

Salesforce populates the target Campaign with all the members included in your report. Navigate to the target Campaign, then click **Related**. Click `view All` in the Campaign Member related list to confirm the members of the Campaign.

Create or find additional reports and populate the `Summer Fundraising Appeal 2018 - Current Donors` and `Summer Fundraising Appeal 2018 - Lapsed Donors Campaigns`.

**Tip**

Don't worry if the same Contact appears in more than one report or list view. When you Add to Campaign, Salesforce only allows one Campaign Member per Contact for a given Campaign.

Send Communications

You are now ready to execute your Campaign. Export the Campaign list data to prepare a postal mailing and/or use a third-party email integration or event management service to send mass email to your Campaign list.

If you are using NPSP and plan to send postal mail, use the Household Mailing List action to export the mailing list. This feature ensures that only one piece of mail will go to each household address.

This part largely happens outside of Salesforce for us. I export all the list data, perform a mail merge on my desktop, and send the address and merged letter files off to our mail house to be printed and mailed. We don't do the mailings in house, so we save time there. I recently have been looking into mail merge tools that directly integrate with Salesforce. So much potential—maybe next year!

Track Campaign Responses

After you send your Campaign communications out, you'll start to receive responses. Checks arrive in the mail, donors use your online donation forms, and attendees register for your events.



Important

It's critical that your organization is consistent about associating Opportunities and Campaign Members with the correct Campaigns within your Campaign hierarchy. You have several options for doing this, but above all, **keep it consistent!** Your reports and dashboards are only as good as the data you have.

You can record the responses in several ways:

Online

Most nonprofit and education institutions use an online donation and payment processor through a third-party vendor. When a donation or event registration comes in, many of those tools will automatically create or update a Contact, Campaign Member, and Opportunity record.

Be sure to look for providers who offer an integration with your Campaign records so that when gifts and registrations come in, they're automatically associated with the correct Campaign.

Manual Record Entry

Although donors often will donate online, some may choose to mail a check. If the volume of checks you receive during an appeal is manageable, you can manually enter the donor and payment information.

If you are using NPSP, you can also [Create and Update Campaign Members Through an Opportunity](#).

Record Import

If the volume of responses is more than can be handled through individual manual entry, use a data import tool such as the [Data Loader](#). If you are using NPSP, you can import donations using the [NPSP Data Import](#) tool.

Batch Entry

There are a variety of third-party batch gift entry tools [available through the AppExchange](#). Batch entry allows you to enter many records at once in batches that can be verified before being committed to the database.

Gift entry is one of the most important processes I help manage at Mundo Sin Fronteras. I do a fair amount of it myself but also train staff members to do it too. I try hard to ensure that we're all doing it the same way! When there are only a few gifts to enter, we just enter them manually. For larger volumes, we use data import tools to speed up the process.

Go ahead and create some Opportunity records using one of the methods above. To really see your Campaign hierarchy in action, associate some Opportunities to each of the Campaigns you created for this exercise.

Analyze Campaign Results

Reporting and analysis is where all the hard work of setting up your Campaign structure really pays off. Let your data shine!

Campaign Hierarchy Data

At Mundo Sin Fronteras, we're midway through our annual fundraising for the year and I can see all the totals, year-to-date, on one record. Here it is:

Annual Fund 2018	
Campaign Hierarchy Information	
Contacts in Hierarchy	Opportunities in Hierarchy
1,073	379
Responses in Hierarchy	Value Opportunities in Hierarchy
658	\$258,677
Actual Cost in Hierarchy	Won Opportunities in Hierarchy
\$3,287	373
Budgeted Cost in Hierarchy	Value Won Opportunities in Hierarchy
\$3,175	\$247,048
Campaign Goal in Hierarchy	
\$775,000	

Now if I want to drill down and see which appeals have generated the most (or least) money, I only need to look at the Campaign hierarchy view.

CAMPAIGN - ANNUAL FUND 2018		
Campaign Hierarchy		
CAMPAIGN NAME	VALUE OPPORTUNITIES IN HIERARCHY	CONTACTS IN HIERARCHY
Annual Fund 2018 CURRENT	\$258,677	1,117
> Noche Familia 2018	\$153,944	608
> Spring Fund Drive 2018	\$103,403	497
Spring Fund Drive 2018 - Exist...	\$87,600	223
Spring Fund Drive 2018 - Laps...	\$5,326	142
Spring Fund Drive 2018 - New...	\$10,477	132
Unsolicited Donations 2018	\$1,330	12

Reports

Here's a snapshot of some of our more recent Campaigns. With this report, I can analyze which channels and which types of Campaigns are performing best. Not surprisingly, our existing donor base shows up with big numbers when we send appeal mailings. Our annual family night event, Noche Familia, however is still our top performing fundraising activity of all!

REPORT
Campaigns by Channel and Type

Total Value Won Opportunities in Campaign
\$247,048

CHANNEL	CAMPAIGN NAME	VALUE WON OPPORTUNITIES IN CAMPAIGN Sum	CAMPAIGN TYPE
Direct Mail	Spring Fund Drive 2018 - New Donors	\$10,477	Appeal Mailing
Email	Spring Fund Drive 2018 - Existing Donors	\$87,600	Appeal Mailing
	Spring Fund Drive 2018 - Lapsed Donors	\$5,326	Appeal Mailing
Event	Noche Familia 2018	\$142,315	Fundraising Event
Unsolicited	Unsolicited Donations 2018	\$1,330	Unsolicited
GRAND TOTAL		\$247,048	

Earlier this year, I spent some time learning more about [formula fields on Trailhead](#). Since we were also working on our Campaign implementation, I decided to try a few formula fields out: Average Gift Amount and Donor Percentage. Average Gift Amount shows the average gift size within a given Campaign and Donor Percentage is the percentage of people who donated based on the total number solicited. Our executive director loves these metrics, and now they are used in reporting. Check it out!

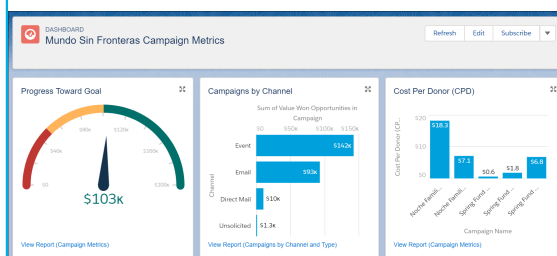
REPORT
Average Gift and Donor % per Campaign

Total Records
5

CAMPAIGN NAME	CONTACTS IN CAMPAIGN	WON OPPORTUNITIES IN CAMPAIGN	AVERAGE GIFT AMOUNT	DONOR PERCENTAGE
Noche Familia 2018	211	35	\$674.48	16.59%
Spring Fund Drive 2018 - Existing Donors	252	217	\$347.62	86.11%
Spring Fund Drive 2018 - Lapsed Donors	142	47	\$37.51	33.10%
Spring Fund Drive 2018 - New Donors	132	62	\$79.37	46.97%
Unsolicited Donations 2018	12	12	\$110.83	100.00%

Dashboards

We're still working on getting our dashboard totally put together, but we do (at last) have agreement on some key metrics for our organization. You'd think that would be an easy question to answer, but it sure has taken a long time! The Cost Per Donor (CPD) chart shows how much money it cost for materials to solicit each donor.



I hope you've enjoyed taking this journey with me. There's a lot of learning and experiences packed into this user guide so you should expect to refer to it again and again as you work through the various exercises.



But you don't have to do it all alone. We're at our best when we help each other and for Salesforce I have found mi familia in the [Trailblazer Community](#). If you are looking for help, check out the [System Administrators](#) and [Fundraising](#) groups. [Si hablas español](#), there's a group for that too! And don't forget to lend a hand if there's a question that you can answer. You might just make someone's day. Adiós!

Resources

NPSP How-To Series Videos

- Watch the Nonprofit Salesforce How-To Series video: [What are Campaigns? Why Would Nonprofits Use Them](#)
- Watch the Nonprofit Salesforce How-To Series video: [Add Donations to Campaigns](#)
- Watch the Nonprofit Salesforce How-To Series video: [How To Add Campaign Members](#)
- Watch the Nonprofit Salesforce How-To Series video: [How To Use Campaign Hierarchy](#)

Further Resources

- [What are Campaigns and How Do They Work](#)
- [Campaign Basics Trailhead Module](#)
- [Campaign Management Implementation Guide](#)
- [Standard Campaign Fields](#)
- [Send Email in Lightning Experience](#)

Acknowledgements

This guide would not have been possible without the advice and insights from a wide range of customers, users, and partners. A lot of the research and planning was conducted during the 2018 Open Source Community Sprints. [Community Sprints](#) are two-day events where the community of users, admins, implementation partners, app partners, and developers come together to make the ecosystem around our products better for everyone. Salesforce.org would like to thank the following contributors:



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I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.

– Maya Angelou