How **First Book** Uses Classy for Salesforce to Target Donors

FOUNDED	YEARS ON CLASSY	NUMBER OF EMPLOYEES	ANNUAL REVENUE
1992	1	85	$100 MILLION+

PREPARE FOR THE NEXT CHAPTER

In her role as SVP of Development and Alliances, Diana Peacock oversees all the fundraising activities for First Book. Recently, she's also been overseeing a huge migration of their online fundraising efforts to Classy.

This transition will help First Book support their audience—the largest and fastest growing network of educators and program leaders serving children from low-income families. That means building the resources to supply new books, learning materials, and other essentials by bringing in more support through personalized and targeted outreach.

First Book began using Classy in May 2017, and they're currently in the process of integrating with Salesforce. With the Classy for Salesforce integration, they can talk to all their donors to understand specifically how each supporter interacts with First Book.

It's important for the organization to meet donors where they are, but that's a big job because there are more than 375,000 members in their network, and tens of thousands of supporters who engage with First Book on their behalf. Further, this network grows at a rate of about 1,000 educators per week. That's why a system like Salesforce that scales along with them is essential at this stage in their growth.

For the most part, these break down into three kinds of donor groups: individual supporters, committees of volunteers who fundraise for local communities, and corporate partners. But First Book also wanted a holistic view of the people who fundraise on behalf of the organization.

For First Book, part of sustaining a robust 360-degree view of their donors and managing the data associated with these supporters means working with a partner that prioritizes efficiency. As a Classy customer, First Book automatically reaps the benefits of Classy being backed by Amazon Web Services, which ensures security and scalability for all Classy customers. With both Salesforce and AWS on their side, First Book can get crucial supporter information without worrying whether or not the data flow will be interrupted.

" *We went through a rigorous software selection process. With Classy, the reason it was perfect for us with the Salesforce integration is that our peer-to-peer fundraising program is half offline and half online.* "

DIANA PEACOCK
SVP of Development and Alliances,
First Book

First Book wanted a platform that showcased the power of new fundraising technology and was simple to learn. This is especially relevant to their group of community-based fundraisers who raise money and distribute books, primarily offline. With Classy and Salesforce, they can track these offline initiatives.
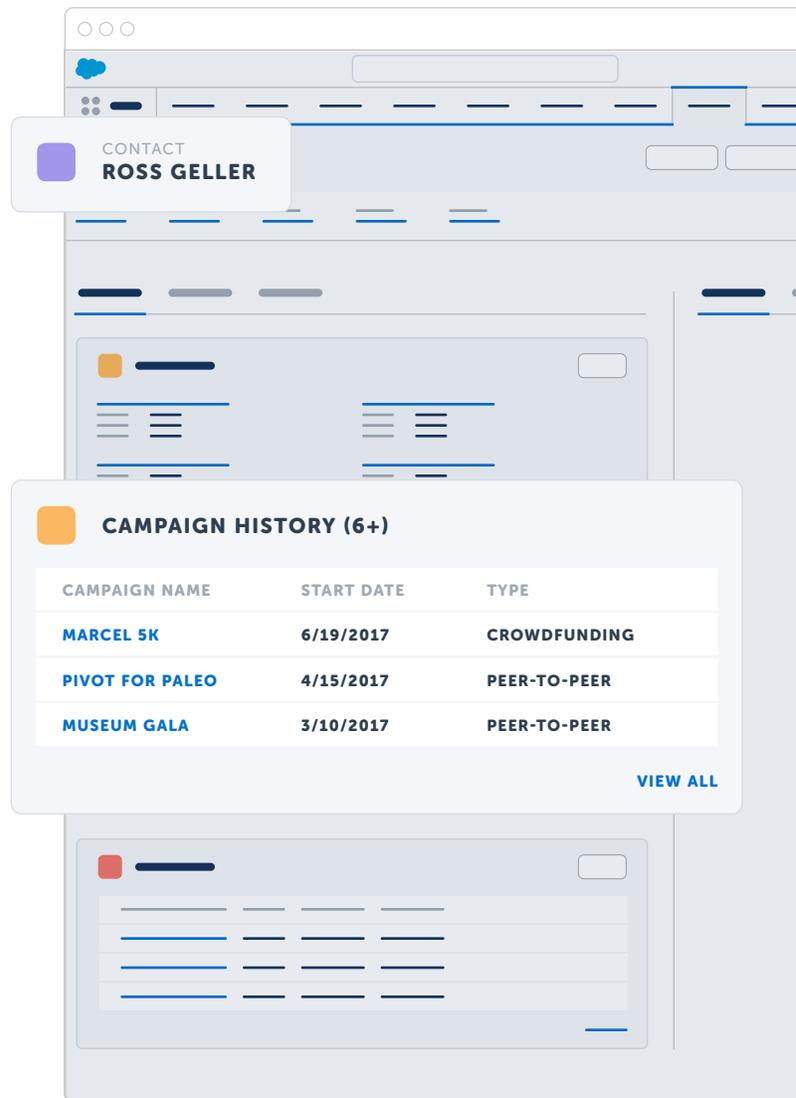
THE MOTIVATION BEHIND CHOOSING CLASSY FOR SALESFORCE

" I come from the belief that donors, like consumers, expect a certain level of intelligence from organizations they interact with. That's based on the incredible CRM movement and increasing levels of personalization with online interfaces like ecommerce, websites, and social media. " **DIANA PEACOCK**

First Book wants to give their constituents an interface that has the same level of sophistication, speed, ease, and intuitiveness as any other modern technology platform. Diana feels that Classy offers this, and it's important because their donors aren't just donors, they're consumers.

"Nonprofits aren't resourced like for-profit companies are. Some have a legacy system that provides a nearly 360-degree view of the donor. However, a lot have older technologies as their core, and they're bolting on other systems. We had just dipped our toes in the water of peer-to-peer and crowdfunding through other platforms and homegrown solutions, but we didn't have anywhere to integrate all of that information."

That's why they turned to Salesforce.

CONTACT
ROSS GELLER

CAMPAIGN HISTORY (6+)

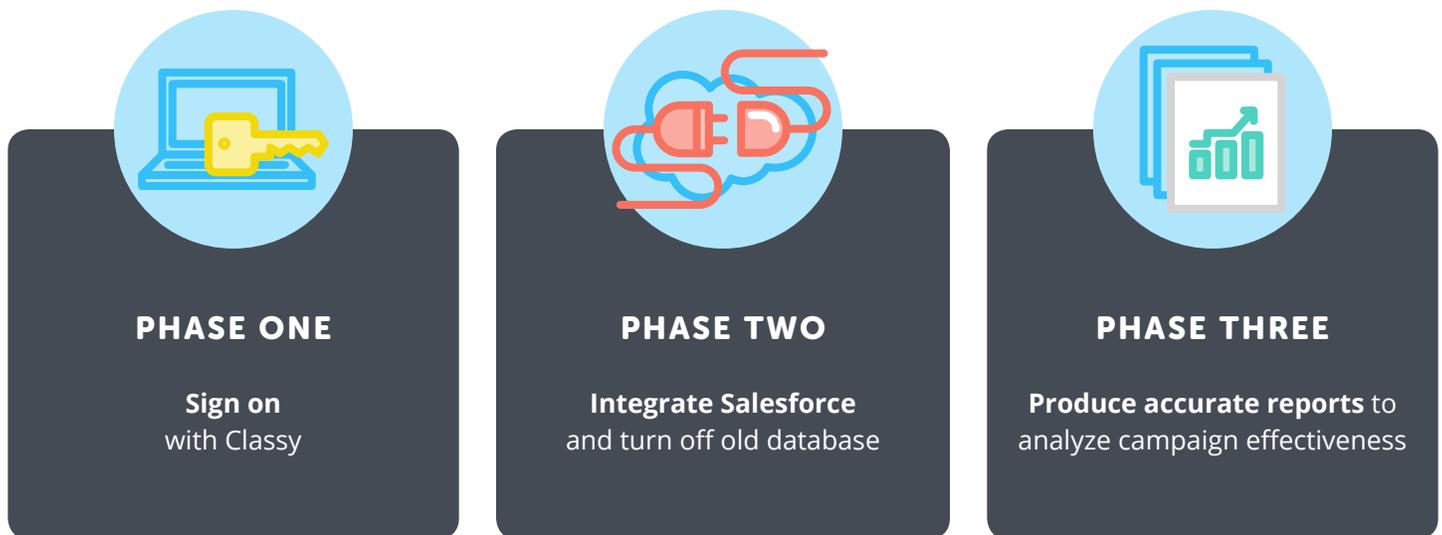| CAMPAIGN NAME	START DATE	TYPE
MARCEL 5K	6/19/2017	CROWDFUNDING
PIVOT FOR PALEO	4/15/2017	PEER-TO-PEER
MUSEUM GALA	3/10/2017	PEER-TO-PEER

VIEW ALL

INTEGRATING WITH SALESFORCE

With the Classy for Salesforce integration, Classy remains First Book's comprehensive online fundraising platform that delivers a best-in-class user experience to donors. Salesforce is the master database that provides the 360-degree view of First Book's donors and enables them to successfully report back to supporters about their impact.

Salesforce also shows First Book details about their more than 375,000 registered educators, or members, who are the main target for their nonprofit ecommerce

platforms, the First Book Marketplace and First Book National Book Bank. With this information, Diana and her team can ensure they're sending the appropriate number of emails to both their educators and donors, and not overburdening them with messages.

As the integration continues to take shape, First Book will be rolling it out in phases. They determined this roadmap with their channel partner Coastal Cloud, who is helping with the implementation.

PHASE ONE

Sign on
with Classy

PHASE TWO

Integrate Salesforce
and turn off old database

PHASE THREE

Produce accurate reports to
analyze campaign effectiveness

This is what some of the individual elements of the integration process look like:

- **Member Side**: First Book is integrating Magento—their nonprofit ecommerce platform and database of record for educators who became registered members in order to access books and resources—with Salesforce

- **Direct Marketing**: Pardot was chosen because it provides sophisticated email automation that can be triggered based on transaction history and registration information

- **Development**: First Book is leveraging the Nonprofit Success Pack (NPSP) and classic core functionality of Salesforce to strengthen fundraising efforts
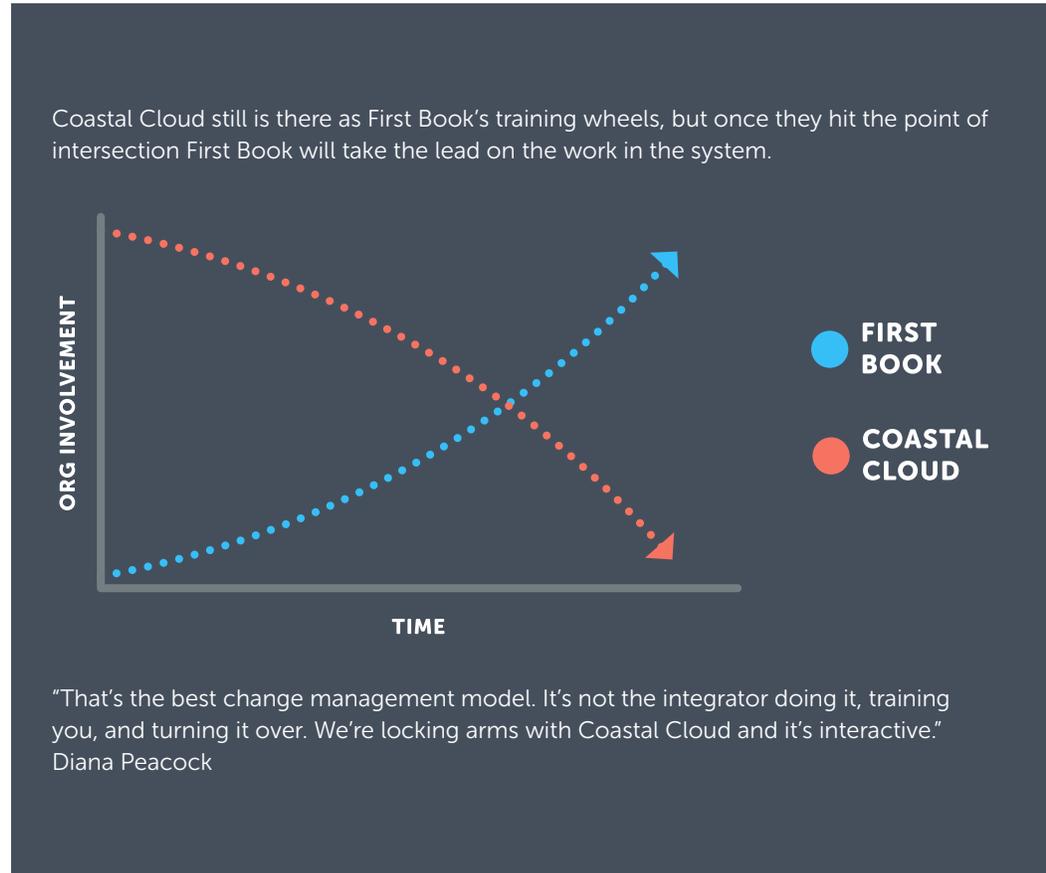
CHANNEL PARTNERS

While successfully integrating with Salesforce doesn't require channel partners, they can be incredibly helpful for larger organizations that need to maintain a focus on the day-to-day business. In that light, Coastal Cloud has been instrumental for First Book's Salesforce integration.

" *We chose them because they had experience working with nonprofits as well as commercial ecommerce clients. They're able to draw from a bigger bench to help us.*" **DIANA PEACOCK**

The common misconception with channel partners is that you can turn over the keys and they'll do everything for you. But with complex processes, involvement of the business owners at each step in the integration is key to success.

This entire process, which involves implementing NPSP, Pardot, Magento, and the whole Salesforce database, takes about 9 to 12 months. First Book is doing a crawl, walk, and run approach so they don't bite off too much at once.

" *Even with a phenomenal integration partner like Coastal Cloud, it's significant time away from the business. But, at the same time, it's absolutely worth the time and effort.*" **DIANA PEACOCK**

Coastal Cloud still is there as First Book's training wheels, but once they hit the point of intersection First Book will take the lead on the work in the system.

ORG INVOLVEMENT

TIME

FIRST BOOK

COASTAL CLOUD

"That's the best change management model. It's not the integrator doing it, training you, and turning it over. We're locking arms with Coastal Cloud and it's interactive." Diana Peacock

BENEFITS TO KNOWING DONORS

Members and donors are crucial to First Book, but these dedicated users weren't easily trackable, especially within a database of thousands. This is one of the reasons First Book is so excited about the Classy for Salesforce integration and the ability to have a single repository for their most devoted constituents.

Further, First Book can facilitate the reporting they need to suit their specific campaigns, programs, and initiatives. For example, every month they report back to their corporate partners about how much they've raised, and then reconcile their online and offline donations.

Before integrating with Salesforce, First Book was creating these reports from multiple databases, which was a significant investment of time for the team. Now they have access to detailed reporting in a more streamlined, efficient system.

This also means that First Book can build a more personalized and relevant approach into their interactions with donors. For example, if a donor gives at a $1,000 level, First Book can configure the communications flow so that individual sees different page elements from someone who gives at a $10 level. This personalized approach encourages donors to be more generous because they're being catered to as individuals, not lists.

> " *I'm most excited about being able to efficiently deliver a more personalized experience that's easier and more relevant to them.* "

DIANA PEACOCK

Building an experience like this isn't an easy task, but Classy for Salesforce can help with a targeted approach that ultimately encourages more donations with a custom solution catered to who they are as individuals.

Classy

Learn How Classy for Salesforce Can Transform Your Nonprofit

Talk to an Integration Expert Today