



## **NPC Migration Blueprint**

**Unlock the Full Potential of Your CRM with Salesforce Nonprofit Cloud**



# What is Nonprofit Cloud<sup>©</sup>?

A multi-departmental hub, made for nonprofits

## Bring fundraising, programs, and outcomes together.

Nurture all stakeholder relationships on a unified platform that facilitates data-driven work, in a secure way. Have the flexibility to adapt, to sustain, and grow, in an ever-changing environment.

### SCALABLE

Nonprofit Cloud offers flexibility as your organization grows, building upon learnings from NPSP and creating a best-in-class suite

### COMPREHENSIVE NONPROFIT SUITE

Nonprofit Cloud is built to support every aspect of nonprofit management, including Donor Management, Grant Management, Fundraising, Volunteer and Event Management

### COLLABORATIVE

Nonprofit Cloud fosters team collaboration by enabling real-time communication, shared insights, and synchronized efforts across departments.

### ENHANCED ANALYTICS

Nonprofit Cloud offers powerful, customizable analytics and dashboards that provide real-time insights to help drive data-driven decisions.

### ADVANCED AUTOMATION AND INTEGRATIONS

Nonprofit Cloud automates key processes and integrates seamlessly with other tools, streamlining operations and enhancing overall efficiency.

# Nonprofit-Specific Capabilities

What can I expect from Nonprofit Cloud for my industry-specific needs?



## NPC Capability

## NPSP Equivalent

### Program Management

Deliver programs with clarity and efficiency. Create structured program models and automate enrollments, ensuring participants receive the right services at the right time.

Program Management Module managed package. Similar, minor differences in data model.

### Fundraising

Modern, scalable fundraising. NPC uses Opportunities with flexible gift entry, donor journeys, and major giving workflows — built on standard Salesforce objects for better integration across the org. Action Plans define steps to achieve specific outcomes. Data Processing Engine powers rollups for flexible analytics.

NPSP OOTB. Recurring Donations object. Engagement Plans. Separate Payments object. Customizable Rollups/DLRS.

### Case Management

Support individuals holistically using Cases and long-term Service Plans. Case Managers get a 360° view of clients and can track goals, assessments, notes, and services. Built-in alerts and assessments keep interventions proactive and data-driven.

NPSP OOTB. Basic Case object for tracking client services, no built in plan tracking and limited cross-object integrations.

### Volunteer Management

*Coming Summer 2025.* Mobilize your mission. Easily post volunteer opportunities, match people based on availability and skills, and track hours — all in a unified hub with real-time calendar views and volunteer history.

Volunteers4Salesforce (V4S) managed package.

### Grant Management

Track grants from application to reporting. Manage deliverables, deadlines, and funder relationships while aligning funding with specific programs and outcomes.

Outbound Funds Management (OFM) managed package.

# Industry-Agnostic Capabilities

What can I expect from Nonprofit Cloud for my broader business needs?



## NPC Capability

## NPSP Equivalent

### User Interface

With OmniStudio, nonprofits can craft tailored, drag-and-drop user interfaces that simplify complex processes. Whether serving clients, volunteers, or staff, OmniStudio empowers you to build guided workflows and data-driven forms *without code* – accelerating time to impact and enhancing user satisfaction.

Limited declarative through screen flows, largely custom-code LWC only.

### Data Visualization

ARC provides modern, real-time and interactive visuals designed for nonprofit needs. Empower teams with clear, centralized visuals that make program metrics, fundraising trends, and operational data easier to understand, share, and act on – all within the Salesforce platform.

Embeddable reports or LWC.

### Accounting Management

Accounting Subledger (ASL) translates donation data into finance-ready entries that sync seamlessly with accounting systems like QuickBooks, Sage, or NetSuite. Reduce reconciliation headaches, eliminate manual exports, and ensure financial accuracy across development and finance teams.

ASL managed package.

### Outcome Mgmt. and Tracking

Demonstrate your impact. Collect qualitative and quantitative data linked to outcomes. Dashboards and reports show funders and boards how your work creates real-world change.

No built-in expansive outcome tracking (Outcome, Indicator, Measurement)

### People Management

In NPC's Party-Centric model, individuals are represented as Person Accounts (a type of Account), and their roles (e.g., donor, client, volunteer) are managed through related Party Role records, allowing greater flexibility, and a single individual to engage in multiple capacities.

Households composed of Contacts. Relationships, Affiliations objects to connect Contacts/HHs/Accounts.

# The Strategic Case for Nonprofit Cloud: Is It Right for You?



## KEY BUSINESS FUNCTIONALITY & USABILITY

What key non-profit functions does Salesforce support at your organization and departments?

*NPC supports all non-profit functions without managed package installation*

Are you planning to scale any of those functions in the next 12-24 months?

*NPSP can become fragile as we add more automations and layers, but easier to manage*

Are you creating custom objects to make up for missing functionality?

*New objects integrate better with existing automations/data model in NPC*

Is clean UI/UX desired, that goes beyond standard screen flows and matches Salesforce's or your organization branding guidelines?

*OmniStudio and ARC enable polished user experiences without code*

## INFRASTRUCTURE SCALABILITY

Is automation or performance an issue, particularly with some of the NPSP objects?

*TDTM is apex heavy, NPC is admin friendly with prebuilt declarative components*

Is NPSP starting to feel like a black box — powerful, but hard to fully understand or scale (e.g. one person managing NPSP Settings)?

*NPC customization is integrated with standard Salesforce setup, not a custom settings hub*

What types of integration are used? Were custom workarounds built to support your system?

*NPSP relies heavily on TDTM and legacy architecture, making integrations tricky*

Do you rely on AppExchange and third-party products? Are they non-profit specific, or more industry-agnostic?

*Non-profit specific third-party products will need to be vetted for NPC compatibility*

# Resource Estimates by Module

Estimated Effort and Workstream Overview



Functionality Module	Complexity Level	Key Outcomes
Program Management	High	Guided process screens and intake OmniScripts, program and service tracking, tailored workflows, MoM tracking and dashboards
Fundraising and Donor Management	High	Recurring donations, gifts, soft credits VS hard credits, roll-ups, campaign management, automated thank-you notifications
Case Management	Medium	Case routing, email to case, intake, follow-up processes, case status and milestones, email standardization and authentication (SPF/DMARC/DKIM)
Grant Management	Medium	Grant application tracking and lifecycle flow, document storage, compliance milestone tracking
Volunteer Management	Medium	Scheduling, volunteer demos and support, hour tracking, engagement management, guided/help texts and catered documentation
Financial Management (Accounting Subledger)	Medium to Low	Exportable journal entries report based on revenue recognition policies, automatic adjustments based on data changes
Outcome Mgmt. and Tracking	Medium to High	Actionable Relationship Centre [ARC] data visualization, pipeline visualization and forecasting, system user adoption tracking and KPI success metrics

# Key Considerations



# Tradeoffs to Consider in your move to NPC

NPC is Powerful — But It's Better with a Guide



## DATA MODEL

**Custom Objects:** Moving from NPSP's heavy use of custom objects (e.g., Household Account, Relationship, Affiliation) to the standardized model in NPC means some customization and legacy configurations may no longer fit.

**Address Management:** There is no specific object for seasonal or temporary addresses, instead standard Contact/Account objects store all the addresses.

**People Relationships & Households:** NPC de-emphasizes the Household model, relying more on a more flexible [Person Accounts](#) model.

**Migration and Mapping:** Data migration needs careful mapping between the old NPSP model and the new NPC model

**Rollups:** Customizable Rollups/DLRS has evolved into Data Processing Engine (DPE) - scalability and performance has increased, along with complexity

## DATA HYGIENE

**Data Validation Rules:** NPSP has some built-in validation rules for handling data quality (e.g., Household name formatting, duplicate detection). NPC may have new validation logic that can impact your existing data hygiene practices.

**Data Integrity:** Transitioning between data models may expose old data integrity issues that weren't apparent in NPSP (e.g., duplicated records, misaligned relationships).

**Clean-up Pre-Migration:** We may need to complete significant data clean-up before migrating, especially for contacts and households that don't fit into the new NPC person-account model.

## THIRD-PARTY COMPATIBILITY

**AppExchange Compatibility:** Some NPSP-specific apps may not be fully compatible with NPC's new data model and may require updates or replacements. Industry-agnostic applications are likely unaffected.

**Integrations:** Legacy integrations (e.g., payment processors, external systems) built for NPSP's custom objects may break or need adjustments to work with NPC's API-first design.

**Integration Strategy:** NPC's new architecture will simplify some integrations (e.g. Omnistudio), but for others, custom development may still be needed to connect with third-party systems.



# Frequently Asked Questions (FAQ)

NPC is Powerful — But It's Better with a Guide



***Is NPC replacing NPSP?***

NPSP net-new developments will not be occurring. Nonprofit Cloud will have ongoing support and new build functionality

***Is NPC built on the same platform as NPSP?***

Nonprofit Cloud is its own cloud and architecture, whereas NPSP is a managed package on Sales Cloud

***Is NPC more expensive than NPSP?***

No, as part of a promotion - for 6 months org licenses are \$0

***Do I lose my Power of Us donation licenses?***

No, as part of a promotion - all NPSP licenses will be match, surpassing the Power of Us 10 (for eligible nonprofits)

***Can I migrate all my data to NPC?***

As part of implementation, mapping exercises are conducted to realize direct paths object-object

***What happens to my existing configurations like automations, objects, and reports?***

Each configuration can be examined, enhanced and re-constructed in Nonprofit Cloud



# Why a Strategic Partner Can Make All the Difference

NPC is Powerful — But It's Better with a Guide



Salytics is a Toronto based group of Salesforce consultants, distinguished by world class technical expertise. In our 15 years experience catering to a diverse clientele, Salytics brings people, process and technology together.

Our journey is marked by the success stories we create, forging a link between technology solutions and meaningful missions of our clients. Our proficient delivery team supports a spectrum of transformation projects while maintaining the agility, responsiveness and unwavering focus on client success.

Salytics is a trusted partner of Salesforce, specializing in the Non Profit and High Tech industry sectors. We pride ourselves on our methodology centered around collaboration and transparency, fostering strong customer relationships. Count on our team of experts to bring in-depth knowledge and hands-on experience to ensure a seamless and efficient implementation.

# Salytics Overview & Corporate Profile





# Meet The Leadership Team

**Ryan Abreo**  
CRO / Managing  
Partner



**Ben Griffith**  
CFO / Managing  
Partner



**2011**

Founded. Launched  
AppExchange apps to  
capture web analytics in  
Salesforce

**2013**

Published  
Marketing  
Automation with  
Eloqua book with  
Packt Publishing

**2014**

Migration of Adobe and  
Oracle

**2021**

Acquisition of  
Gladly Beyond

**2023**

20+ full time consultants

**2024**

AI + Data Cloud  
specialization



# Salytics Corporate Profile

**We empower companies to get the most out of their Salesforce investments.**

## Our Leading Technology Services

- ★ Salesforce Consulting
- ★ Systems Migration
- ★ Enterprise Project Delivery
- ★ Managed Services
- ★ Change Management

✓ **Customer Centricity** | Align with your mission and form long term relationships through open communication.

↗ **Scalable Standards** | Solutioning your digital transformation to be up to enterprise standards.

⊖ **Exceptional Talent** | Informed recommendations from a passionate team of senior consultants.

↻ **Continuous Improvement** | Create an actionable roadmap to stay ahead of the curve.

## Imagine Canada

"...what sets Salytics apart is their *commitment to excellence across all capabilities required in a Salesforce partner*: leading technical expertise, ability to navigate complex collaborations, attentive stewardship of the engagement, and ultimately, a deep and genuine dedication to our shared success. Salytics is more than just a vendor, they are an *indispensable and trusted partner* and we look forward to many more collaborations with them in the future."

NON PROFIT SOLUTIONS



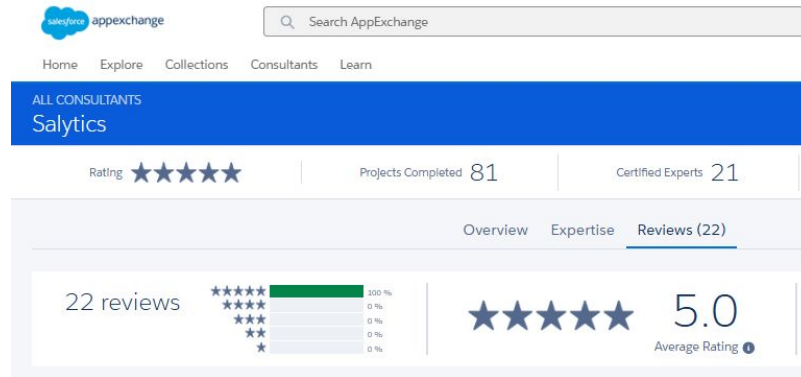
# Best in Class - Salesforce Nonprofit Partner



## Proven Track Record of making Nonprofits Successful

As shown on our Partner Profile in the Salesforce AppExchange Partner Page we have consistently held the highest standards in client satisfaction and value with an average CSAT score of 5/5 in over 90 Salesforce Implementations and reviews to match.

We build long term strategic relationships with our Nonprofit Clients based on trust and consistency over time.



Survey Response  
Project Review

Product Area  
Sales Cloud, Nonprofit Solutions

Industry  
Nonprofit



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Salesforce Verified

Absolute professionals with a commitment to excellence. They got to know us, our operations, even our own internal jargon. They took on thought leadership, initiative, and truly thought about all angles and possibilities in the planning stages, with an excellent execution to follow. Stunning.



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