



Your Essential Guide to Running a Nonprofit

Manage your people, projects and money on the
Salesforce Platform



PEOPLE, PROJECTS & MONEY: MAXIMIZE THE IMPACT OF YOUR NONPROFIT MISSION. FinancialForce is 100% native to Salesforce, and brings back office functions into your Salesforce environment. Now you can manage your people, projects and money on the same platform where you manage your fundraising, programs and communications.

Single Cloud Platform for Fundraising & Back Office: Maximize the impact of your mission

Easy to own and quick to adapt, our apps let you stay agile and grow profitably. Maximize the investment you've already made in Salesforce applications and know-how.

- Easy to configure and implement for fast ROI.
- Flexible to change and adapts to your organization.
- "Clicks not code" customization and integration.
- Extend your use of the Nonprofit Starter Pack with apps on the Salesforce AppExchange.

Visibility & Reporting: See across everything, drill into anything

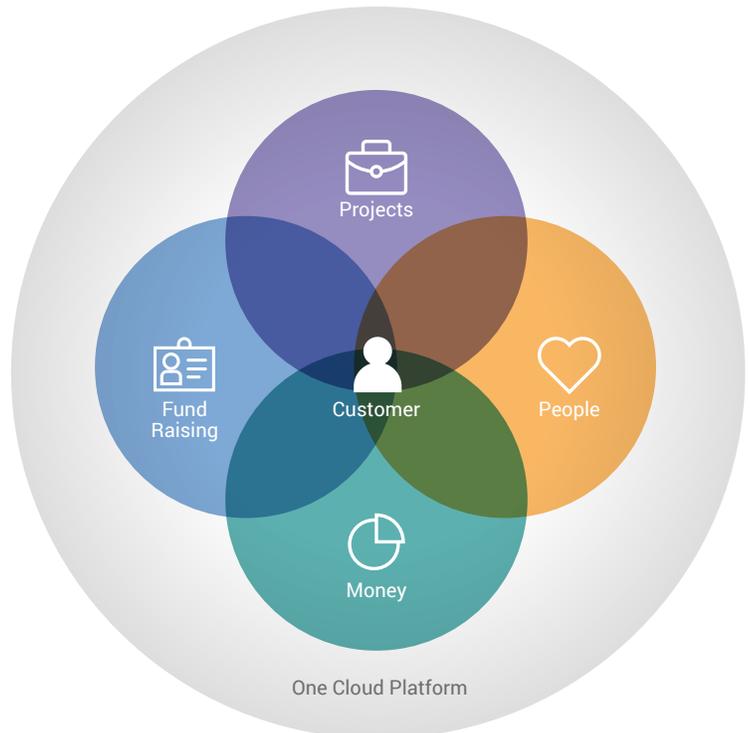
One database for your donors, beneficiaries, programs and ERP information provides a single version of truth across the organization using one set of reporting and dashboarding tools.

- Get an end-to-end view of your entire organization.
- See KPIs across donations, programs and ERP apps in one dashboard.
- ERP data drives better decision-making.
- Measure the effectiveness of every dollar raised and spent.

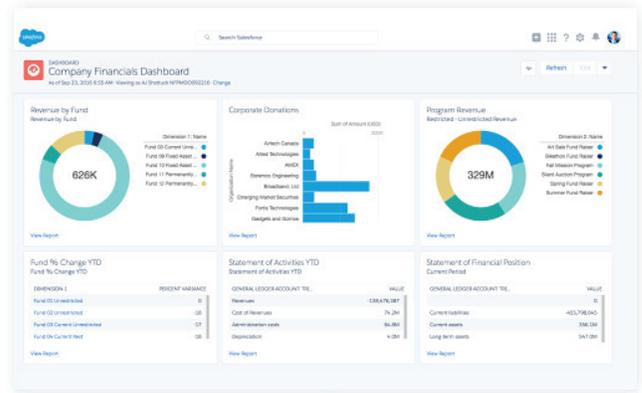
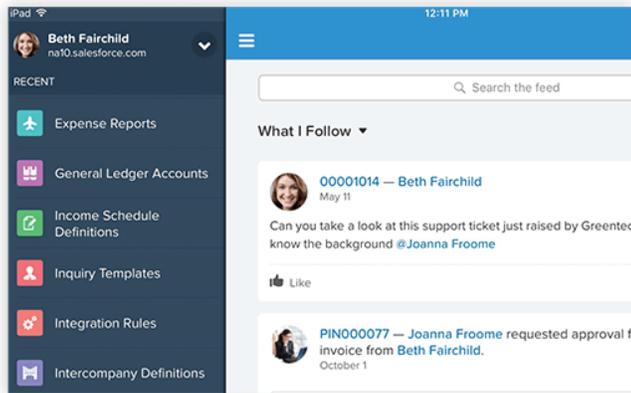
Compliance & Audit: One platform, one truth

All your apps living on one platform means a single version of the truth. Compliance and audits are a breeze with automated audit trails, documentation and associated conversations.

- Automatic tracking of essential audit fields.
- User-defined tracking of your key fields — old value and new value.
- Commentary, files, scanned documents and evidence on any transaction all in one place.



FINANCIALFORCE FOR NONPROFITS



Actionable Social Feed: Chat. Cooperate. Collaborate

- Get social and break down the walls between departments.
- Use Chatter, an instant news feed for teams to share info, ask questions, and update one another.
- Perform actions without ever leaving your organization's social feed.
- Get intuitive collaboration across all departments and teams.
- Enable teams to build cross-company networks, resources and knowledge.

Reporting & Analytics: Personalized dashboards and trend analyses for everyone

- Get standard reports, customized reports and ad-hoc inquiries.
- "Clicks not code" report creation and editing.
- Data visibility controlled by security profiles.
- Full mobility of reports and dashboards.

Salesforce1 Mobile: The mobility of everything

- See, and act on, all your business data, and communicate with co-workers, donors and beneficiaries.
- Get on-the-go notifications for approval requests, @mentions and system generated alerts.
- See all your dashboards on the go with drill down access.

MAXIMIZE THE IMPACT OF YOUR MISSION

Solve your most pressing problems today with one app and grow into a full solution over time.

Projects

Reporting & Dashboards
 Project Management
 Mobility & Collaboration
 Sales Engagement
 Project Financials
 Talent Management
 Resource Management
 Billing & Revenue Recognition
 Time & Expense Management

Money

Accounting & Finance
 Revenue Management
 Billing Central
 Spend Management
 Inventory Management

People

Human Capital Management
 Human Resource Management
 Workforce Management
 Benefits
 Employee Engagement
 Talent Acquisition
 Talent Management
 Workforce Reporting & Analytics

SUCCESS STORY

Interlochen



Kim Zubrickas
Executive Director, HIR

I love what FinancialForce has done for us, because it's connected us to the institution and to the employees more. It's given us the opportunity to have a really powerful system that we can talk, collaborate, communicate, and do what we need to do as a business.

Interlochen Center for the Arts creates magic, FinancialForce HCM powers it

Interlochen Center for the Arts is a magical place, a creative institution where thousands of artists and arts patrons come to experience world-class educational and cultural opportunities. Interlochen is dedicated to the promotion of world friendship through the universal language of the arts.

Interlochen wants that same magic to be felt by employees and FinancialForce Human Capital Management (HCM) is making that happen. The cloud-based HR application empowers Interlochen HR to inspire employees to collaborate and be engaged. FinancialForce HCM also provides the HR team a powerful system to remove administrative overload and bring in richer communication.

Case Study Product

FinancialForce Human Capital Management

Systems Replaced

Other

Company Size

Medium

Location

Interlochen, Michigan

Industry

Nonprofit

SUCCESS STORY • Interlochen

Before: Too many systems needed to run HR

Kim Zubrickas, Executive Director, HIR at Interlochen knew that to be a cutting-edge HR department, their existing systems were too antiquated and lacked functionality. They had too many point solutions managing key pieces of HR e.g. recruiting, performance management, compensation planning. The HR team was spending more time managing data and in admin hassles than adding value to the organization.

Now magic: Hire to Retire in a single app

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Now Magic: Hire to Retire in a Single App

Kim had the vision of a single solution to manage the entire 'hire to retire' lifecycle and FinancialForce HCM was the answer. Now they can recruit, hire, track and manage the workforce using a single, unified HR app. The HR team is better equipped to provide deeper business value to the organization.

"FinancialForce is really helping us be more successful, and have a higher level internal customer service for our employees" – Kim Zubrickas

Onboarding a breeze

Interlochen manages a year-round full time staff along with a large number of seasonal hourly employees which was a challenge until FinancialForce HCM. An applicant record becomes the interview record which becomes a new hire record. The mounds of paperwork are gone. FinancialForce makes it so everyone can find what they need to get up to speed quickly.

"We wanted a system that would make that transition from, 'I want to work at Interlochen,' to 'I am going to work in Interlochen,' to 'I'm arriving here to work in Interlochen,' as smooth as possible. HCM has allowed us to streamline that a lot." – Michael Slawnik, Manager of Applications and Development

Engagement brings productivity

Employees are more productive when they're engaged and Kim has the data to back this up. Since implementing, HCM employees are more active in the self-service portal, collaborating with other team members and feeling empowered.

"Employees love being able to go in the system and look at their vacation time, their sick time, and all of their data. They can change it on their own in real time. And because of that reason, they have connected a lot more with Interlochen." – Kim Zubrickas



What stood out for us about HCM was the way that it took very, very complex pieces of data, benefits, what benefits am I enrolled in, what am I eligible for, how did that all fit together last year, etc, and the way that they put that together for the end user to manage, again user experience, was really, really awesome."

Michael Slawnik | Manager of Applications and Development



Self-service removes the burden off HR team

The self-service ability for managers and employees has removed all kinds of data inaccuracies, inconsistencies, and time-consuming processes chasing down answers. Everything is in the cloud, and everything is accessible to everyone.

An HR app driving decisions for the business

Cortney Wallace loves the reporting in HCM! She is able to provide more meaningful data to the senior staff. Interlochen gets detailed visibility of all the worker info they need to make data-driven, business decisions on things like wages and salaries by department. 'Are we doing the right thing, or do we need to make some changes' are internal questions that drive smarter business decisions.

"HCM reporting is the best I've seen anywhere. I can report on everything now, and it's the most exciting part of my job, because everything is accurate, I trust it. FinancialForce reports are so presentable. You can use dashboards and make them beautiful." – Cortney Wallace, HR Generalist

Creating a lifelong community

Michael Slawnik conveys how the flexibility of HCM allows them to capture interesting information about the community in this unique organization.

"So that 360-degree view of the person as: Came to camp when they were 10, came to the high school when they were 14, and then 10 years later had a child and that child wanted to go to camp, and lo and behold, they had a career that meant they could come to camp and work. That's an amazing picture of affinity and relationship with the institution that we were missing before we adopted FinancialForce."

Benefits with benefits

The Financial HCM Open Enrollment functionality makes the process quick to manage, pretty understandable, and you can ask a question in a way that you get an answer back immediately. Along with the powerful core HR stuff, Open Enrollment adds richness to the functionality. It's a piece that touches everybody in the organization.



Onboarding with HCM is absolutely amazing. It's all electronic. The new employee doesn't have to fill out paper anymore. Everything lives together, all streamlined, in one place. We have over 1,000 employees that check in every summer, and this process has made our lives in HR much easier!"

Cortney Wallace | HR Generalist

SUCCESS STORY • Interlochen

Payroll connectivity

One of the greatest benefits for Interlochen is that the HR friendly system from FinancialForce still connects to ADP Payroll. The HCM Payroll interface allows the two systems to talk to each other and everyone gets paid!

Clicks not code!

The flexibility of FinancialForce allows even the most non-technical person to work IT magic in the system.

"I'm not a developer. I have an English degree and a Music degree. The way that FinancialForce architected their solutions to allow for further customization and automation is game-changing. The Clicks Not Code way allows us to get the benefit to the business much more quickly and get them moving" – Michael Slawnik



Employees are more productive when they're engaged with Interlochen, and that's just a statistical fact. And we've seen a lot more engagement since we've implemented the system."

Kim Zubrickas | Executive Director, HIR

Founded in 2009, FinancialForce is the leading Cloud ERP vendor with apps built entirely on the Salesforce App Cloud. The company's Financial Management, Professional Services Automation (PSA), and Human Capital Management (HCM) offerings provide services-centric businesses with a platform that organizes sales, services, finance and HR entirely around their customers. Headquartered in San Francisco, FinancialForce is backed by Salesforce Ventures, Technology Crossover Ventures, Advent International and UNIT4.

For more information about FinancialForce:

www.financialforce.com
info@financialforce.com
Americas: 1-866-743-2220
UK: 0808 2389791
Int'l: +44 1423 532832
APAC: +61 2 9006 1351



To find out more about FinancialForce solutions, please contact us at:

www.FinancialForce.com | info@financialforce.com | 866-743-2220 | @FinancialForce