



# Taking a digital step(s) forward to support your journey to impact

15 Nov 2022

SOCIALware @Dunden Antwerp





# Being in the driving seat of new models

FUTURE



PRESENT + TECHNOLOGY





# Think & Build, Beyond

Introduction to asUgo



Think  
and  
Build,  
Beyond.

75+  
asUgoers



2  
Villages  
(Belgium, Portugal)



#Curious  
#Nimble  
#Committed

150+  
Projects





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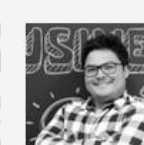
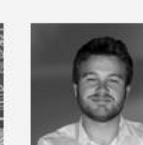





# The (growing) team

#curious #nimble #committed #oneteam



 <b>Ilse Marin</b> Senior Consultant	 <b>Benoit Neuville</b> Manager	 <b>Gaetan Mondet</b> Managing Director	 <b>Julien Blaise</b> Managing Director	 <b>Philippe Uyttendaele</b> Senior Manager	 <b>Jennifer Maignon</b> Manager	 <b>Duarte Catela</b> Consultant	 <b>Lucie Blanckaert</b> Senior Consultant	 <b>Gaëtan Fisse</b> Manager	 <b>Anne-Laure Davin</b> Finance Manager	 <b>Nicolas Chesnel</b> Consultant	 <b>Nuno Tomás</b> Consultant
 <b>Jürgen Janssens</b> Senior Manager	 <b>Harold Van Crombrugge</b> Consultant	 <b>Celine Brandt</b> Senior Manager	 <b>Margaux Decortis</b> Senior Consultant	 <b>Julien Stroobants</b> Manager	 <b>Erik Stuyven</b> Senior Manager	 <b>Yann Thomas</b> Consultant	 <b>Quentin Mathoux</b> Manager	 <b>Mathilde Dubois</b> HR Partner	 <b>Luis Armada</b> Senior Consultant	 <b>Pierre-Louis Picard</b> Consultant	 <b>Maité Delabye</b> Talent Acquisition Specialist
 <b>Jérémy Theunis</b> Senior Consultant	 <b>David Ooms</b> Senior Manager	 <b>Romain Haarscheer</b> Consultant	 <b>Sarah Gilis</b> Senior Manager	 <b>Loïc Callewaert</b> Senior Consultant	 <b>Agnes Kabongo</b> Consultant	 <b>Arthur L'Hoir</b> Senior Consultant	 <b>Olivier Warnier</b> Senior Manager	 <b>Jean-Michel Cricus</b> Manager	 <b>Marie de Hempinne</b> HR Coordinator	 <b>Ousmane Diallo</b> Consultant	 <b>Philippe Bonsang</b> Senior Consultant
 <b>Marie-Noëlle Moinet</b> Manager	 <b>Nathan Zorn</b> Consultant	 <b>François Bertieaux</b> Senior Consultant	 <b>Rodrigue Piette</b> Senior Consultant	 <b>Claire Riboud</b> Senior Consultant	 <b>Guillaume Paulus</b> Senior Consultant	 <b>Sandrine Ineza</b> Senior Consultant	 <b>Pierre Vanneste</b> Consultant	 <b>Maité Cupers</b> Manager	 <b>Jorge Baptista</b> Senior Consultant	 <b>Thomas Devroye</b> Consultant	 <b>Antoine Leflot</b> Consultant

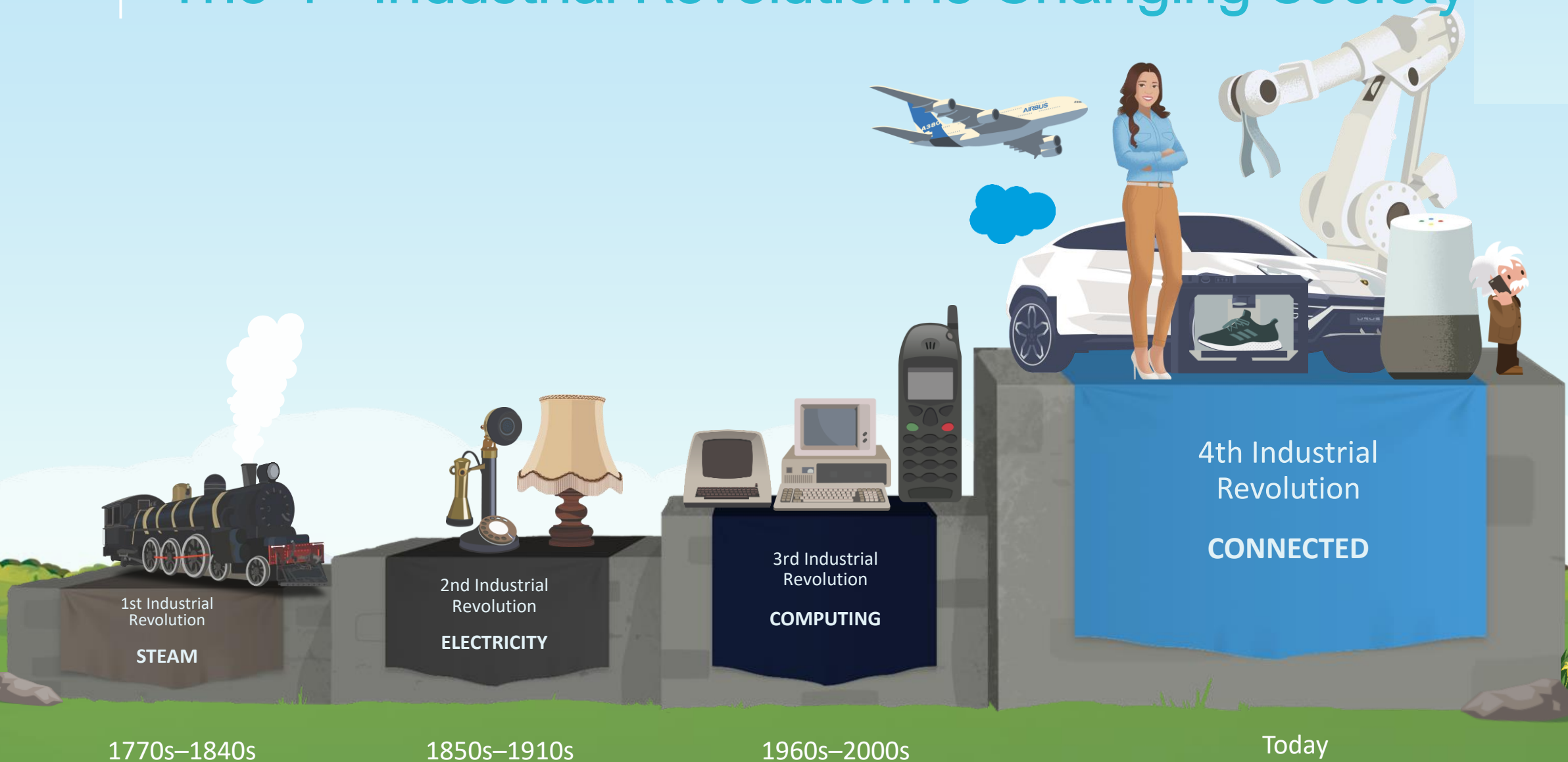


## AGENDA

1. Taking a digital step forward
2. Why a CRM platform
3. Moving forward, together!



# The 4<sup>th</sup> Industrial Revolution Is Changing Society



1770s–1840s

1850s–1910s

1960s–2000s

Today



# The Nonprofit Sector is Changing Rapidly



**PEOPLE**  
are expecting more



**TRANSPARENCY**  
is the key to trust



**DATA**  
is crucial for driving impact

**80%**

of millennials would give & volunteer more if the nonprofit created personalised experiences<sup>2</sup>

**66%**

see an increased demand in transparency from funders and donors<sup>1</sup>

**5%**

use data in decisions that they make, despite 90% of organisations regularly collecting data<sup>3</sup>

1. Salesforce.org 2018 Nonprofit Trends Report  
2. Salesforce.org Connected Nonprofit Report 2016  
3. The State of Data in the Nonprofit Sector, Everyaction.com, NonprofitHub.org





# The challenges of (non-profit) organisations





# The challenges of (non-profit) organisations

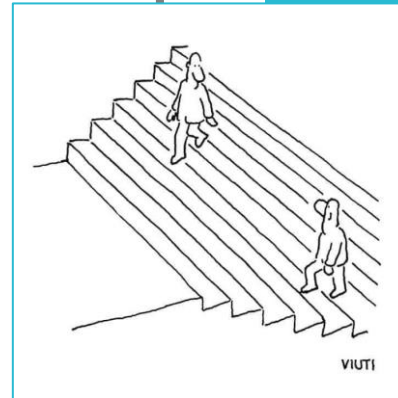


- Decentralised and non structured info
- Low data quality
- Mixed customer experience
- Limited reporting possibilities
- Very motivated vs Operational inefficiency
- Lack of organizational maturity



# Moving forward is still an option

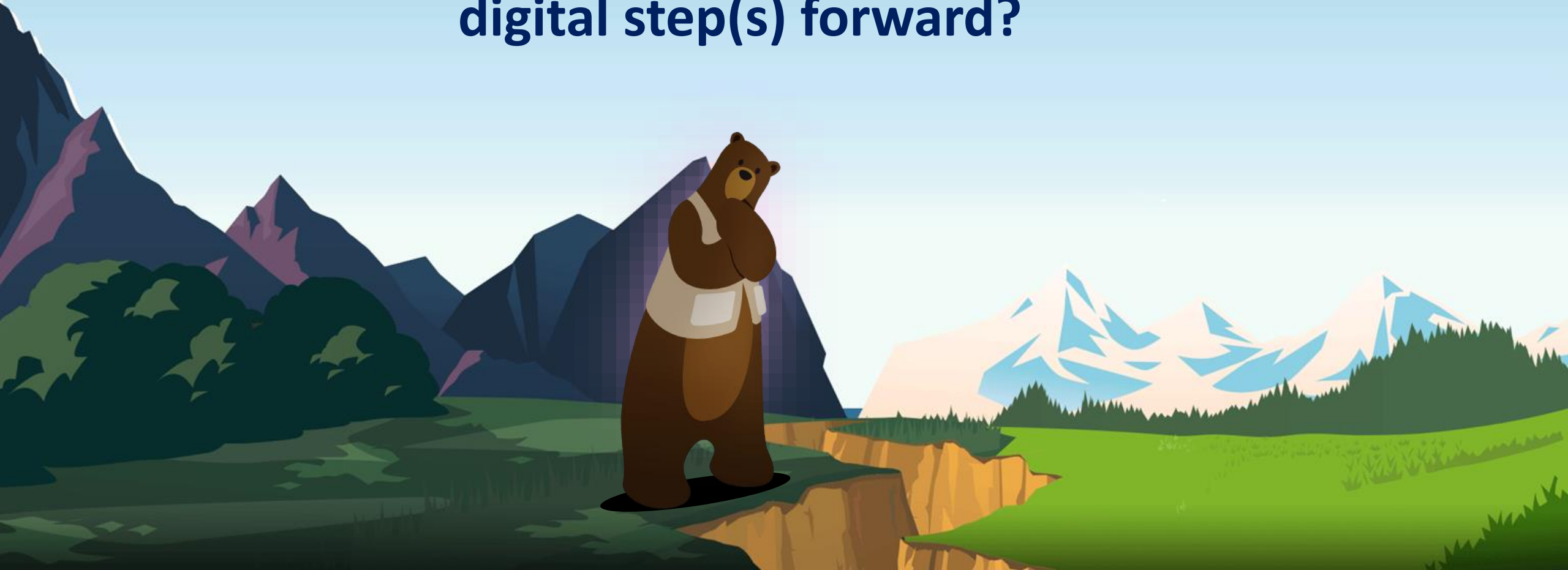
- « 2023 will be complicated»
- « change requires time & money »
- « Again a crisis»
- « Culture can only survive by monetising it»
- « 20% of donors will give less at the end of the year »
- « the number of legacies has decreased »



- « Gen Z is very values driven »
- « Doing nothing is the real risk »
- « Social impact is key for people and companies»
- « Value driven fundraising is a sustainable option»
- « Many people volunteer»
- « during COVID, many non-profits took a digital step forward »



How do we take a  
**digital step(s) forward?**





## RENOVATE

How do we **optimize**  
our **existing activities**?



## TRANSCEND

How do we create **customer**  
**value in new ways**?





## RENOVATE

How do we **optimize**  
our **existing activities**?



## EVOLVE

How do we put our **customer**  
**in the center** of our activities?



## TRANSCEND

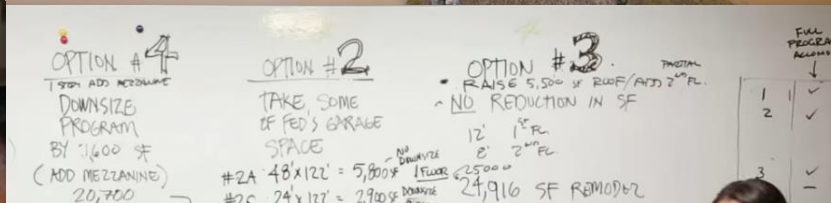
How do we create **customer**  
**value in new ways**?



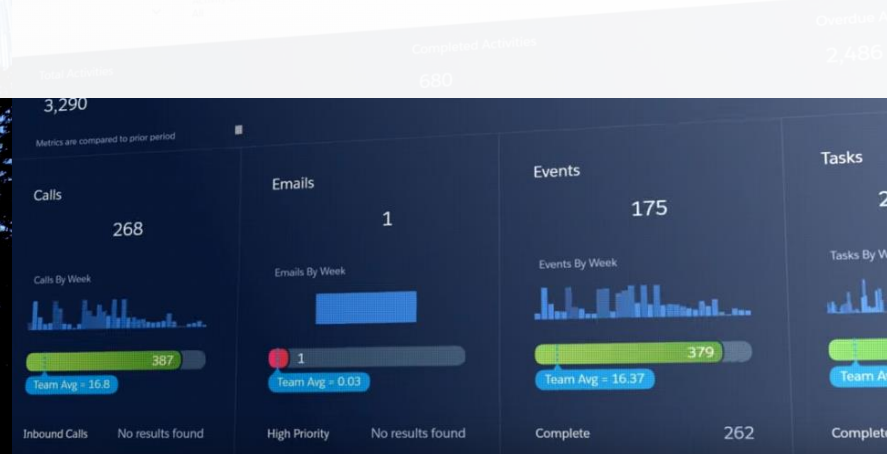


## AGENDA

1. Taking a digital step forward
2. Why a CRM platform
3. Moving forward, together!



**Making it easier for you to have your big ideas**  
**By connecting you with a better understanding of your community**  
**A CRM is there to help you see your way, and connect with the world**







# Connecting you with a better understanding of your community





# Keeping a customer



Costs 5x less than Getting new ones!



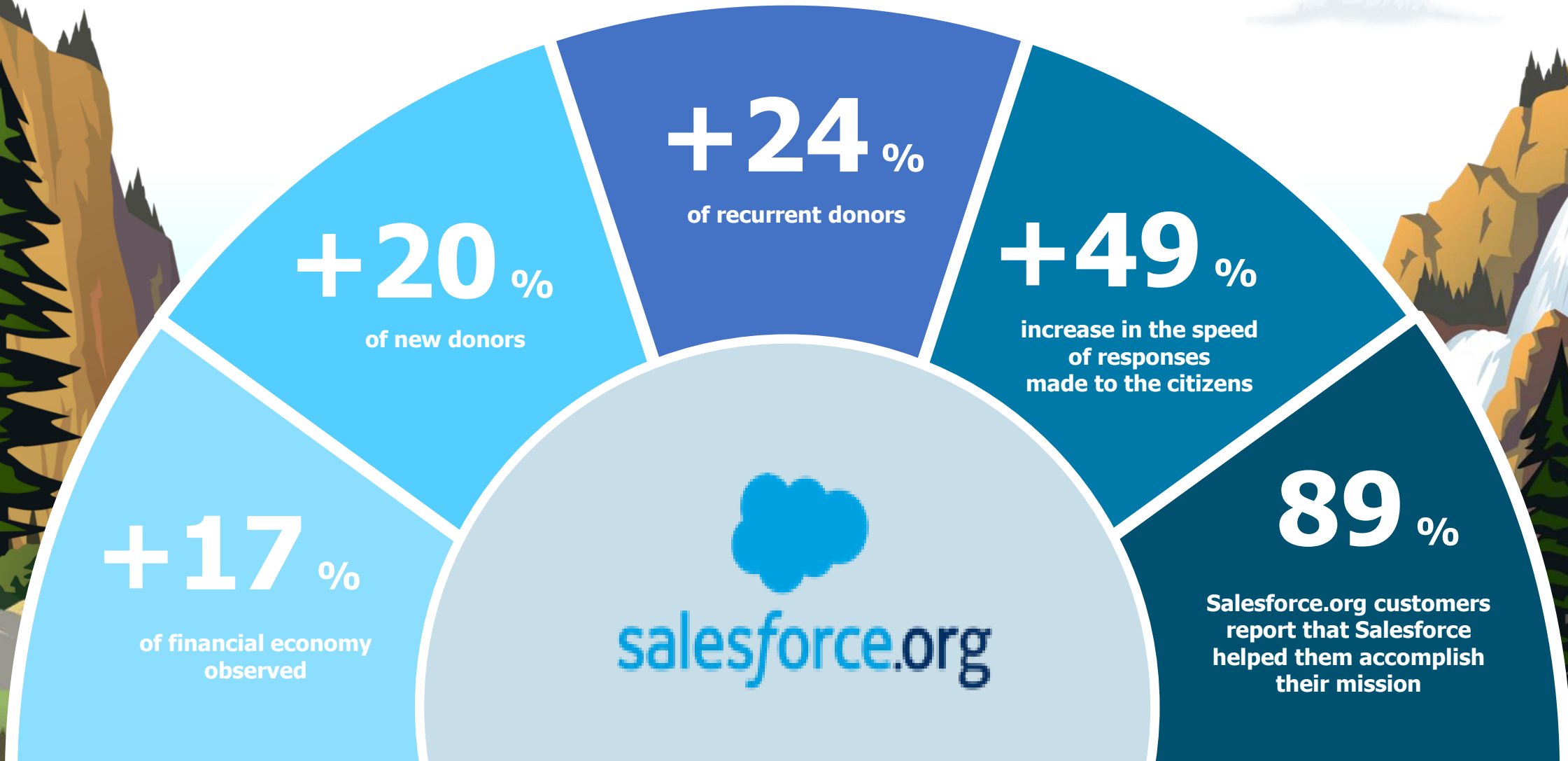
# A connected Non-Profit



- ✓ Employees
- ✓ Volunteers
- ✓ Partners
- ✓ Customers
- ✓ Donors
- ✓ Community



# The « Connected Nonprofit » gets real results



**Let's make it tangible!**





# Welcome to



**Non-profit organisation**  
(Brussels, Ghent, Liège and Eupen)  
**Strong growth the last 6 years**

## Goal:

- **Grow the positive societal impact of locally produced, healthy food**

## Activities:

- **INFORM**
  - Informing private people, companies & organisations
- **ACTIVATE**
  - Bringing together actors of the field
  - Guiding its members
- **PROMOTE**
  - Private & public projects
  - Organise Educational & other Events
  - Invite to relevant Events organised by Members
  - Sell products (Books, Products...)
  - Give small grants to support projects





# The journey to impact of asUgrow



Solid actions taken during the last 2 years, to go beyond the daily challenges



Personalization



Nurturing  
Management



Automated  
communications



**Knowledge**

Understand what matters to the community



**Engagement**

Nourish Engagement



**Automations**

Take targeted actions, based on knowledge & facts



**Impact**

Grow impact at their own pace





# Let's make it tangible!

## Demo flow



**asUgrow** is an organization that supports the positive societal impact of **locally produced, healthy food**. They are active in Brussels, Ghent, Liège and Eupen. Strong growth the last 6 years.



**Marie and Peter** are a couple since 20 years.

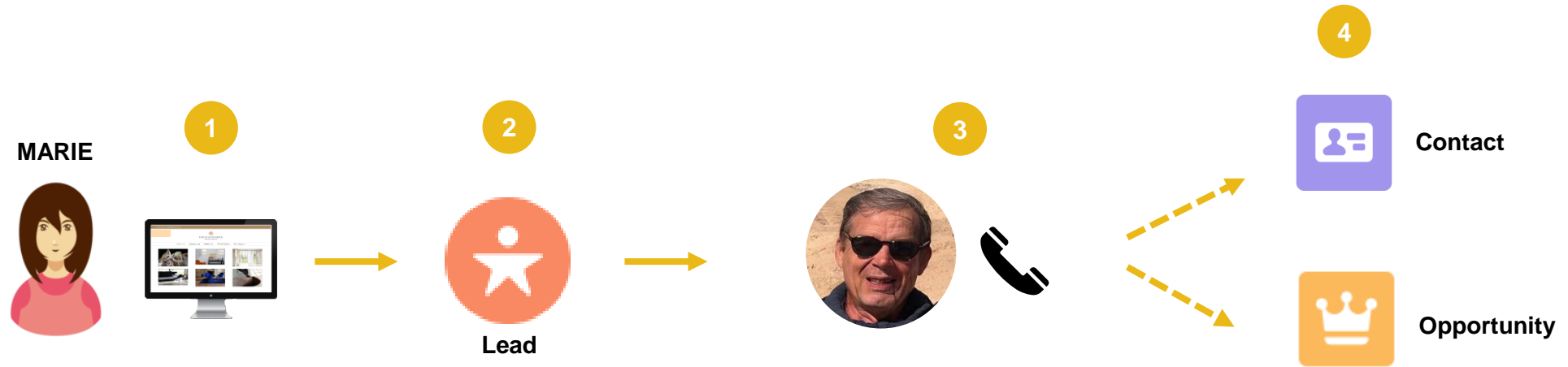
As they are fan of healthy food with a positive local impact, **Marie** decides to setup a collaboration project with **asUgrow**





# Let's make it tangible!

## Demo flow



- 1** Marie looks up information on the website of **asUgrow** and completes the form to be contacted.
- 2** A **lead** is created automatically in Salesforce and assigned to the person in charge.
- 3** **Gauthier, the person in charge, contacts Marie** to answer her questions. At the end of the call, Marie is convinced that she wants to support asUgrow.
- 4** Gauthier **converts the lead** automatically in contact and opportunity.

 The asUgrow team can now help Marie with her demand



# Demo

Your leads are automatically created based on the form

The screenshot shows a Salesforce CRM interface for a lead record. At the top, there is a navigation bar with the 'asUgrow' logo, a search bar, and a star icon. Below the navigation bar is a menu with options: Home, Chatter, Accounts, Contacts, Opportunities, Assets & Liabilities, Reports, Dashboards, Tasks, Calendar, and Campaigns. The main content area displays the lead record for 'Mrs. Marie Depailhe'. The record includes a title, company name 'Imfine', phone number, and email address 'm.depailhe@gmail.com'. There are buttons for '+ Follow' and 'Convert'. Below the record information is a 'Related List Quick Links' section with a link to 'Campaign History (0)'. The 'Details' tab is active, showing fields for Lead Owner (Gauthier Demeure), Name (Mrs. Marie Depailhe), Company (Imfine), Title, Lead Source, Website, Preferred Phone (Mobile), Phone (+32 9 210 01 01), Mobile (+32 486 73 25 62), Preferred Email, Email (m.depailhe@gmail.com), and Lead Status (Open - Not Contacted). On the right side, there is a 'Chatter' section with a 'Post' button, a text input field for 'Share an update...', and a search bar for 'Search this feed...'. The bottom right corner features a decorative blue cloud graphic.



# Demo

Your contacts are automatically created after conversion of the leads

The screenshot shows the Salesforce CRM interface for a contact named Mrs. Marie Depailhe. The top navigation bar includes the asUgo logo, a search bar, and a star icon. The main navigation menu contains Home, Chatter, Accounts, Contacts, Opportunities, Assets & Liabilities, Reports, Dashboards, Tasks, Calendar, and Campaigns. The contact record header shows the name Mrs. Marie Depailhe with a '+ Follow' button. Below the header is a table of key information:

Account Name	Donor	Volunteer Status	Mobile	Email
<a href="#">Marie Depailhe Household</a>		No	+32 486 73 25 62	<a href="mailto:m.depailhe@gmail.com">m.depailhe@gmail.com</a>

Below the table is a 'Related List Quick Links' section with icons and counts for Relationships (0), Organization Affiliations (0), Opportunities (1), Campaign History (0), and Notes (0). A 'Files (0)' link is also present. The 'Details' section is expanded to show 'Contact Details' with a grid of fields:

Contact Details	
Name	Mrs Marie Depailhe
Account Name	<a href="#">Marie Depailhe Household</a>
Primary Affiliation	
Gender	Female
Language	Dutch
Birthdate	30/06/1957
Deceased	<input type="checkbox"/>
Description	

The right sidebar shows the 'Activity' section with a 'Chatter' tab. It includes a 'Post' area with a text input field 'Share an update...' and a search bar 'Search this feed...'. At the bottom of the sidebar is a decorative illustration of a landscape with trees and mountains.



# Demo

The opportunity can now (collaboratively) evolve throughout the defined process

The screenshot displays the Salesforce CRM interface for an Opportunity record. The top navigation bar includes the 'asUgo' logo, a search bar, and a menu with options like Home, Chatter, Accounts, Contacts, Opportunities, Assets & Liabilities, Reports, Dashboards, Tasks, Calendar, and Campaigns. The main content area shows the Opportunity details for 'L-002360\_Marie\_Depailhe\_Project', including the account name 'Marie Depailhe Household', a close date of '30/11/2022', and an amount of '€2,500.00'. A stage progression bar is visible, with 'Low' highlighted in blue, followed by 'Medium', 'High', 'Won', and 'Lost'. Below the bar, there are related list quick links for Contact Roles (1), Opportunity Field History (2), Notes (0), and Stages History (1). The details section is expanded to show 'Project Information' with fields for Opportunity Name, Account Name, Primary Contact, Contact Person, Stage, Qualification, Amount, Close Date, and Lead Source. On the right side, there is an 'Activity' sidebar with options for 'New Event' and 'New Task', and a section for 'Upcoming & Overdue' activities.

Account Name	Close Date	Amount
<a href="#">Marie Depailhe Household</a>	30/11/2022	€2,500.00

Stage Progression: Low (Active) → Medium → High → Won → Lost

Related List Quick Links:

- Contact Roles (1)
- Opportunity Field History (2)
- Notes (0)
- Stages History (1)

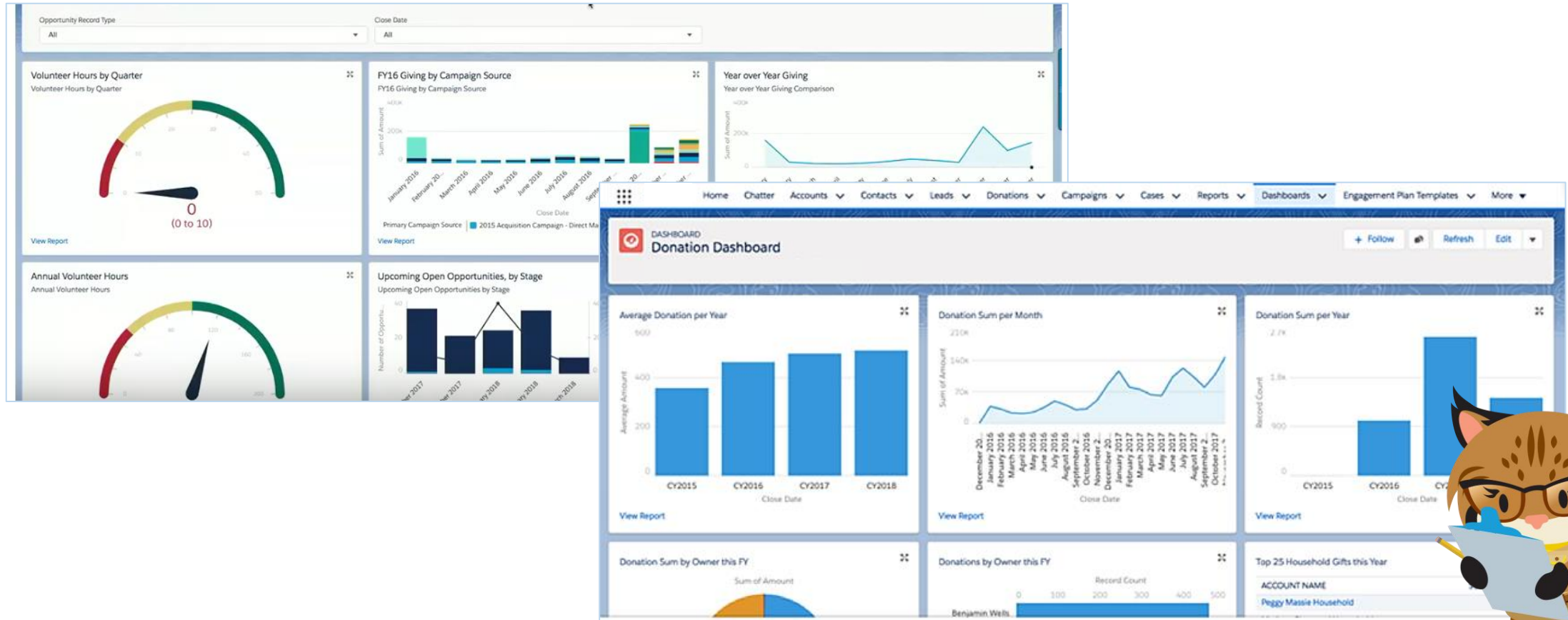
Details - Project Information:

Opportunity Name	L-002360_Marie_Depailhe_Project	Stage	
Account Name	<a href="#">Marie Depailhe Household</a>	Qualification	
Primary Contact	<a href="#">Marie Depailhe</a>	Amount	€2,500.00
Contact Person		Close Date	30/11/2022
		Lead Source	Website



# Demo

Focused decisions. Measure your impact





# Connecting you with a better understanding of your community





# Accelerators

#Innovation



Opportunity  
D-0008 Collaboration project

+ Follow Edit Quick Update New Payment

Contribution to Sustainable Development Goals

1 - No Poverty	<input type="checkbox"/>	10 - Reduced Inequalities	<input checked="" type="checkbox"/>
2 - Zero Hunger	<input type="checkbox"/>	11 - Sustainable Cities and Communities	<input checked="" type="checkbox"/>
3 - Good Health and Wellbeing	<input checked="" type="checkbox"/>	12 - Responsible Consumption, Production	<input checked="" type="checkbox"/>
4 - Quality Education	<input checked="" type="checkbox"/>	13 - Climate Action	<input checked="" type="checkbox"/>
5 - Gender Equality	<input type="checkbox"/>	14 - Life Below Water	<input checked="" type="checkbox"/>
6 - Clean Water and Sanitation	<input checked="" type="checkbox"/>	15 - Life on Land	<input checked="" type="checkbox"/>
7 - Affordable and Clean Energy	<input checked="" type="checkbox"/>	16 - Peace, Justice, Strong Institutions	<input checked="" type="checkbox"/>
8 - Decent Work and Economic Growth	<input checked="" type="checkbox"/>	17 - Partnerships for the Goals	<input type="checkbox"/>
9 - Industry, Innovation, Infrastructure	<input type="checkbox"/>		

SDG Impact

Selected SDGs appear

Closed Mark Stage as Complete

Reusable “plug and play” accelerators:

- European VAT Checker
- Segmentation Module
- SDG 360
- Stakeholder 360
- KPI Dashboards
- Responsive Templates
- Legacy Foundations kit
- Major Donor Foundations kit
- Talent Development canvas
- ...

Contact  
Mr. Hugo Grow

+ Follow Edit New Donation New Recurring Donation

Account Name	Contact Status	Address Status	Email	Phone	Total Gifts
Grow Household	Active	OK	hugogrow@gmail.com	+32 474/44.44.16	€0.00

Related List Quick Links

- Campaign History (0)
- Contact History (4)
- Engagement Plans (0)
- Files (0)
- Notes (0)
- Opportunities (0)
- Recurring Donations (0)
- Related Accounts (1)
- Relationships (0)

Donor Major Donor Peer to Peer Donor Legacy Candidate Volunteer Corporate Donor

Details Related

Activity Chatter

New Task On a Call Email

Donor Major Donor Peer to Peer Donor Legacy Candidate Volunteer Corporate Donor Legacy Candidate Committee Member

A collection of various colored pencils (red, blue, green, yellow, purple, brown, orange, pink, black, white) arranged in a circular pattern around the central text. The pencils are sharpened and their tips point towards the center.

**ALSO  
APPLICABLE  
TO YOUR  
REALITY**





## Other examples with a human / societal impact

- Culture
- Micro-finance
- Environment & Sustainability
- Mentoring & Talent development
- International solidarity
- Mental & physical health
- Grants for Projects with Impact
- Students & Alumnis
- Affordable Housing
- Youth & Education

...





# Other examples with a human / societal impact

Supporting cancer research

**Major organization supporting cancer research in Belgium through Information, grants and events.**

- **Their ambitions**

1. Helping teams of employees and volunteers to have more impact
2. Structure the data, to better understand the stakeholders
3. Activate and engage through targeted communications

- **Project challenges**

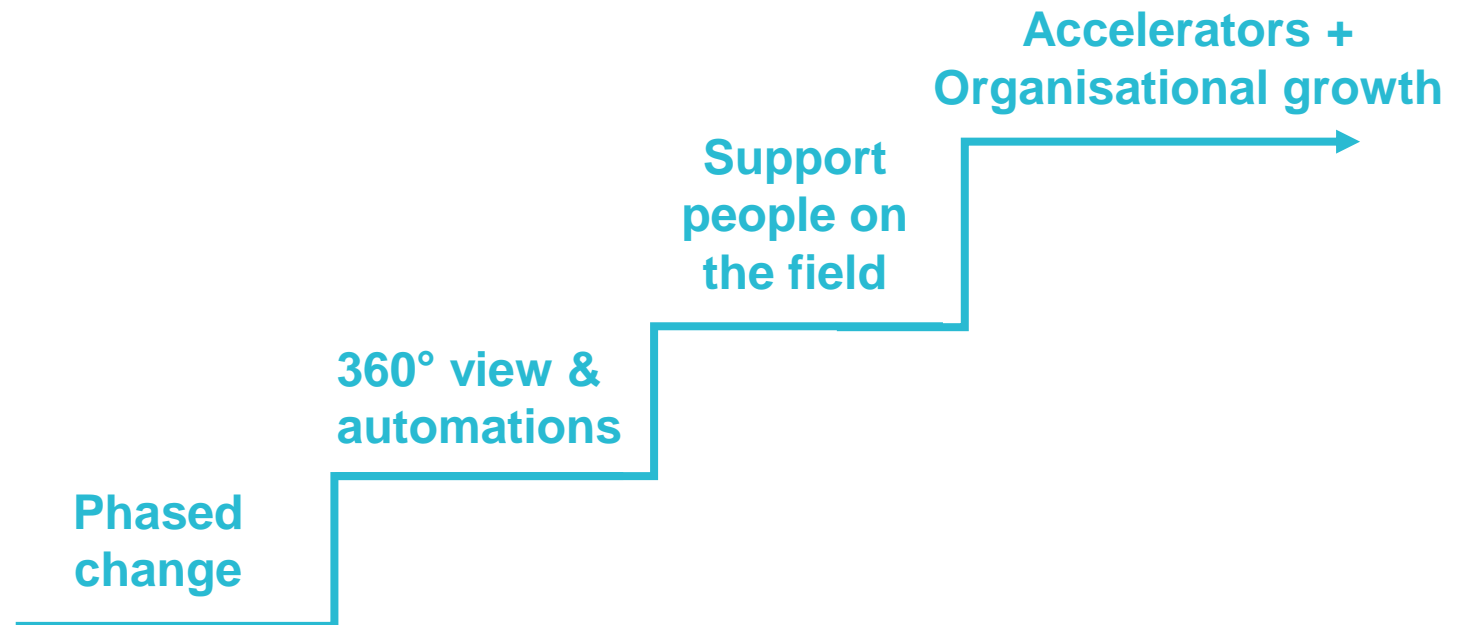
- New to Salesforce.
- Availability of teams to combine project and daily activities
- Take the step towards a new way of thinking and working



# Other examples with a human / societal impact

Supporting cancer research

- Our solution: Moving forward step by step, while keeping the impact in mind





# Other examples with a human / societal impact

## Culture

**Cultural institution that organizes concerts, festivals and theatre plays while remaining open to affordability and niche streams**

- **Their ambitions**

1. Modernise their applications
2. Centralise information
3. Ease collaboration

- **Project challenges**

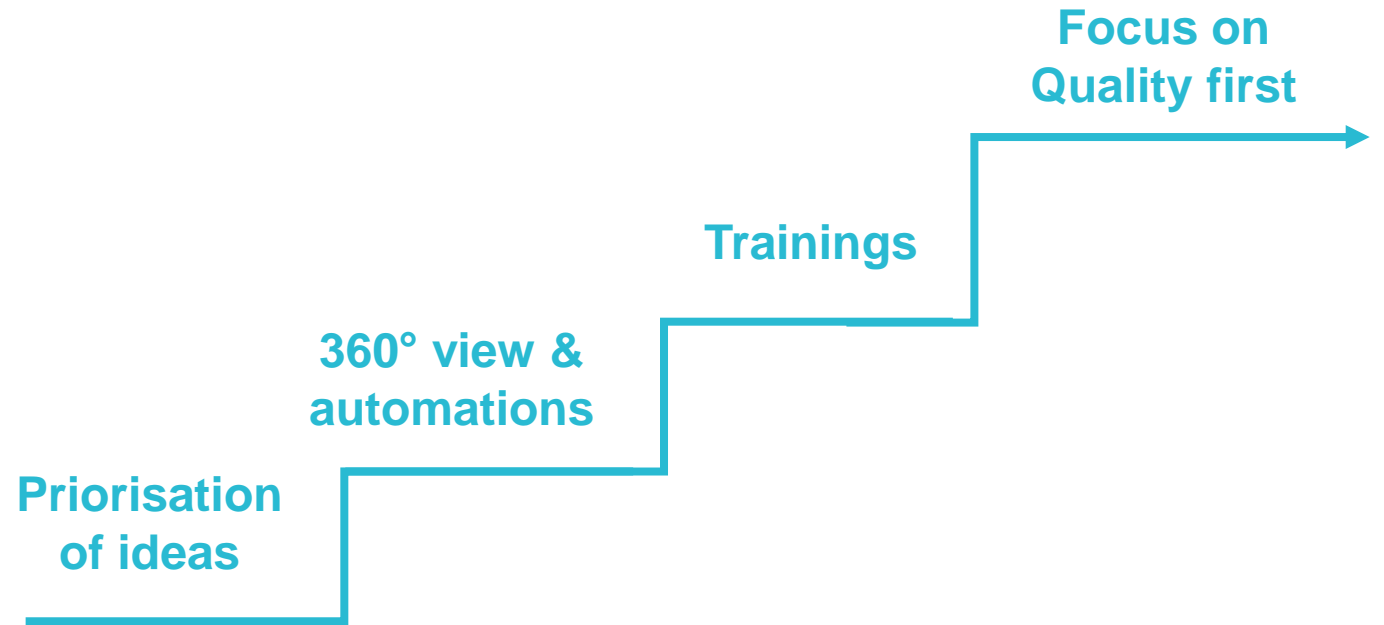
- Small team. Limited budget. Lots of ideas.
- Heavy pressure due to lockdown restrictions
- Limited affinity with technology



# Other examples with a human / societal impact

## Culture

- **Our solution: Progress step by step, Focus on value & learning**





# Other examples with a human / societal impact

## Grants for Projects with Impact

**Contributing to a sustainable, inclusive society in which everyone has a chance to thrive through a job.**

### **Their ambitions**

1. Create a grants portal to receive, review and select projects
2. Allow the further follow and guidance

### **• Project challenges**

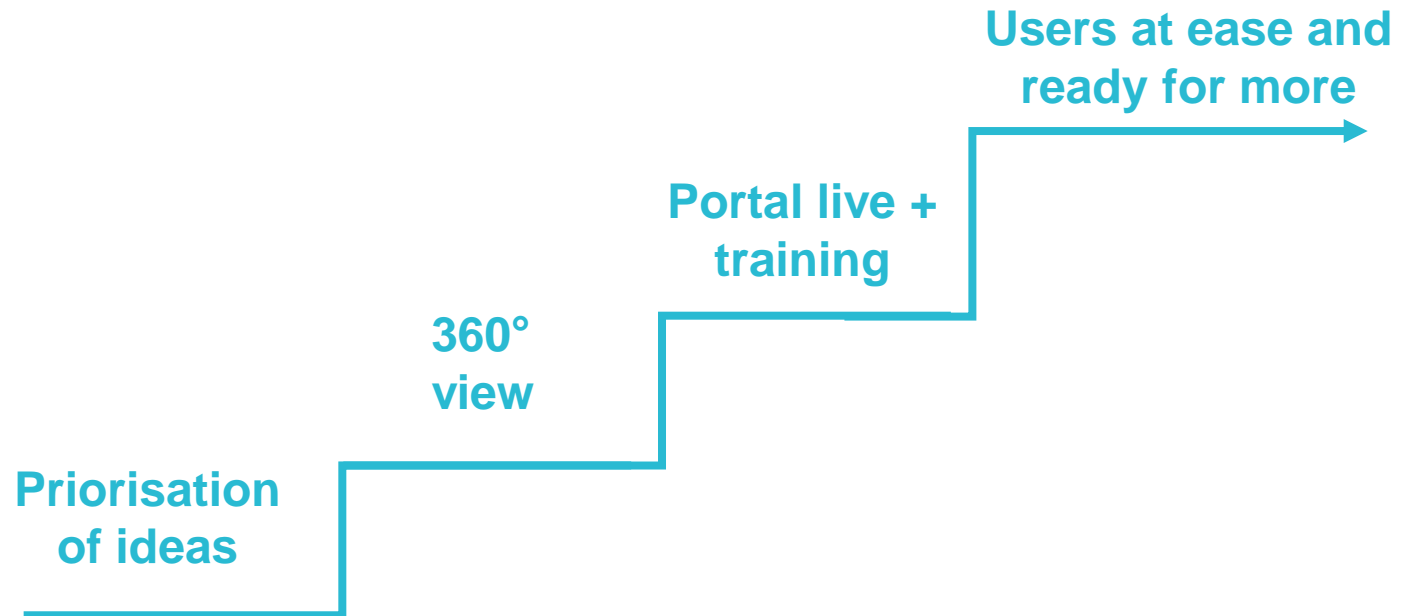
- Small team, many ideas
- Ambitious timeline
- Limited tooling experience



# Other examples with a human / societal impact

## Grants for Projects with Impact

- **Our solution: A pragmatic Think Big, Start Small approach with focus on value**





## AGENDA

1. Taking a digital step forward
2. Why a CRM platform
3. Moving forward, together!





Think **BIG**

Start small



*...Move fast*



# Think big, Start small... and grow your ambitions

- Give yourself the means to support your ambitions
- A CRM is not a goal on itself. It is an enabler.
- Start with a solid foundation, and move forward in steps
- Choose wisely
  - Solid foundations from the start
  - Ease of use for your team(s)
  - Enable your organisation to progress
  - In line with your focused growth



THINK **BIG.**  
START **SMALL.**  
MOVE **FAST.**



# asUgo and SOCIALware

Supporting you in thinking, building and creating impact

salesforce.org  
nonprofit  
cloud

Connect to a Better World



10 free licences for qualified non-profits,  
and preferential rates for Quick Start project



Thank you!





# Thank you!

## BELGIUM

asUgo  
Avenue Lloyd George 7 Laan  
1000 Brussels  
Belgium

Email : [welcome@asugoconsulting.com](mailto:welcome@asugoconsulting.com)



Julien Blaise  
Managing Director  
+32 474 74 14 12



Gaëtan Mondet  
Managing Director  
+32 477 59 68 88



Jürgen Janssens  
Senior Manager  
+32 486 73 42 67

