



Driving Global Impact through Digital Innovation

Tony Blair Institute's Salesforce Journey



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Sophie Green

Nonprofit Cloud, EMEA





Thank you for
being Trailblazers

We're in front of a Challenge



Nonprofit
Workforce
Shortage



Tighter Budgets



Demand is on the
Rise



#1

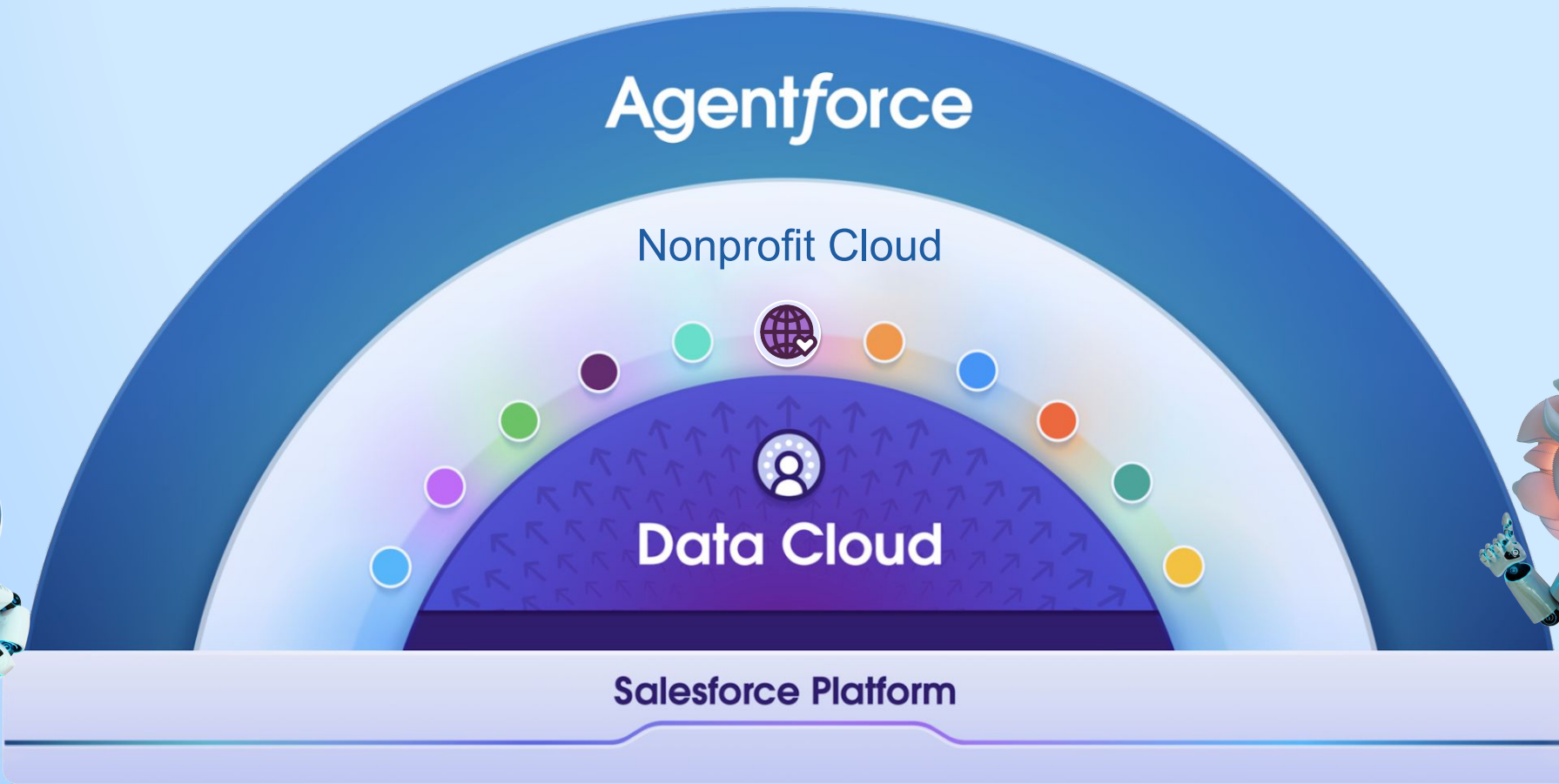
Challenge is
managing workload

Every
Challenge

Provides an
Opportunity



Salesforce for Nonprofits



Agentforce is powering Nonprofit Impact

salesforce



Human-only Workforce

Demands On Services
Reducing Income / Time
Greater Admin Burden
Manual Process

Humans With Agents

Unlimited Helpers
Faster Support
Maximum Outreach





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We have a once-in a lifetime Opportunity



Reimagine
Work



Connect your Data



Leverage
Trusted AI

82%*

Employees
who say
reskilling in the
age of AI is
essential



Purpose-built Agents for Nonprofit



NEW

Participant Management
(pilot)

June

Prospect Research (pilot)

June

Volunteer Management

Oct

The screenshot displays a nonprofit management software interface. At the top, there's a search bar and navigation tabs for "Program Mangement" and "Accounts". The main content area shows a contact profile for "Robin Garcia", including fields for Type (Person), Phone (555-555-5555), Address (10 Main Rd., New York, NY 31349), and Account Owner (Admin User). Below the profile is a "Timeline" section with tabs for "Activities" and "Benefit Disbursement". The "Activities" tab shows a list of events: "Completed Resume Workshop" (10:00am | 10/02/24), "Met with Meg" (9:00am | 10/02/24), and "Scheduled meeting with Meg" (6:48am | 10/01/24). To the right of the timeline is an "Action Launcher" with buttons for "Email", "Log a Call", "New Task", and "New Note". Below the action launcher is a "Details" section with tabs for "About" and "Related". The "About" tab shows fields for Name, Account Name, Website, Account Owner, and Address. The "Related" tab shows a map of the Financial District in San Francisco. On the far right, there's an "Einstein" AI assistant panel with a chat interface. The chat history shows three messages: "Hi Meg, what can I help you with today?", "Create the benefit disbursements for Robin based on what was discussed on our meeting today.", and "OK, based on the recording of your virtual meeting with Robin, here's the Benefit Disbursement record I created. Does everything look correct?". The chat input field contains the text "Describe your task or ask a question...".

Volunteer Management in Nonprofit Cloud



The screenshot displays the 'Budgeting Workshops 2025' page in the Nonprofit Cloud system. The interface includes a top navigation bar with 'Volunteer Management', 'Volunteer Initiatives', and 'Budgeting Workshop...'. The main content area is divided into two sections: 'Job Positions (2)' and 'Job Position Assignments (8)'. The 'Job Positions' table lists 'Workshop Setup' and 'Event Coordinator' at the 'Fremont Center'. The 'Job Position Assignments' table lists five assignments, all for 'Event Coordinator' at the 'Fremont Center', with various statuses like 'Awaiting Approval' and 'Upcoming'. The right sidebar shows 'Activities' with a 'Filter' button and a section for 'Upcoming and Overdue' activities, indicating 'No next steps' and 'No past activity'.

Volunteer Initiative: Budgeting Workshops 2025

Related Details

Job Positions (2)

Name	Position	Location
Workshop Setup	Workshop Setup	Fremont Center
Event Coordinator	Event Coordinator	Fremont Center

Job Position Assignments (8)

Name	Assigned Account	Assigned Contact	Status	Job Position	Job Position Shift
JPA-00000001	Miranda Porter		Awaiting Approval	Event Coordinator	JPS-00000003
JPA-00000002		Stacy Spence	Awaiting Approval	Event Coordinator	JPS-00000004
JPA-00000003		Colleen Cohen	Upcoming	Event Coordinator	JPS-00000003
JPA-00000004	Zachary Tyler		Upcoming	Event Coordinator	JPS-00000003
JPA-00000005	Parker Morrison		Upcoming	Event Coordinator	JPS-00000004

Activities

Activity Timeline

Upcoming and Overdue

No next steps.
Description to get things moving

October 2024

No past activity
meetings and tasks marked as done show up



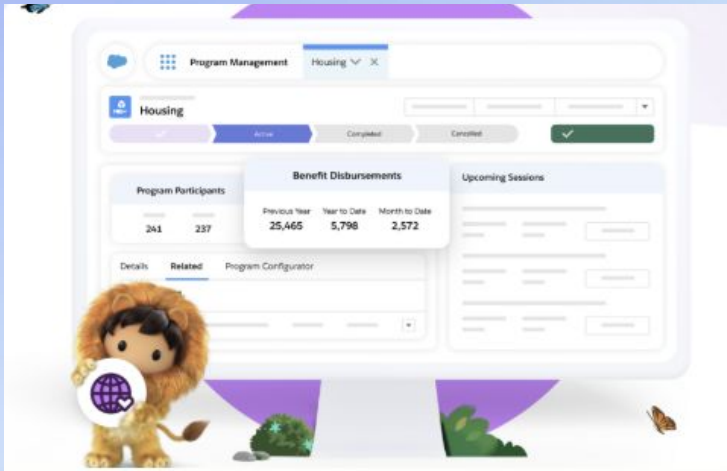
80.000 Trailblazer Community

salesforce



Where do I find out more?

salesforce



Nonprofit
Cloud



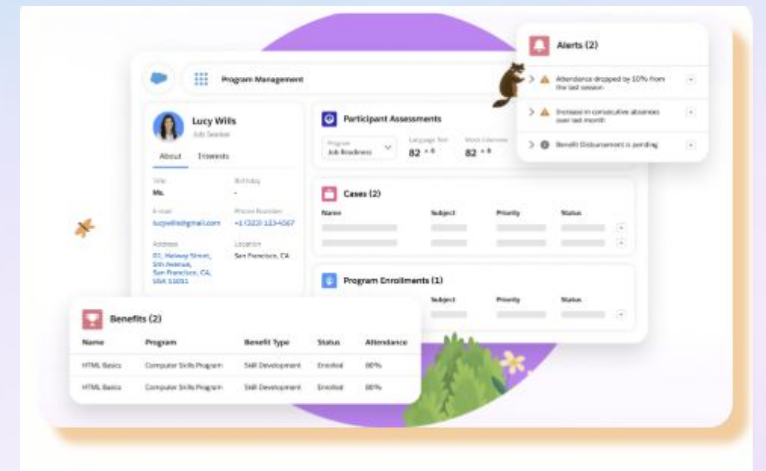
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Community



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with a Trial



Register



Thank you

