AI & Fundraising

Charity Digital Webinar

Alzheimers UK and Salesforce

Today's Speakers

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Charity Digital

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Salesforce

Thank you
salesforce

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Salesforce: Committed to Changemakers

>50K

Nonprofit Organisations

20+ years

Nonprofit-specific Innovation

Continued Innovation

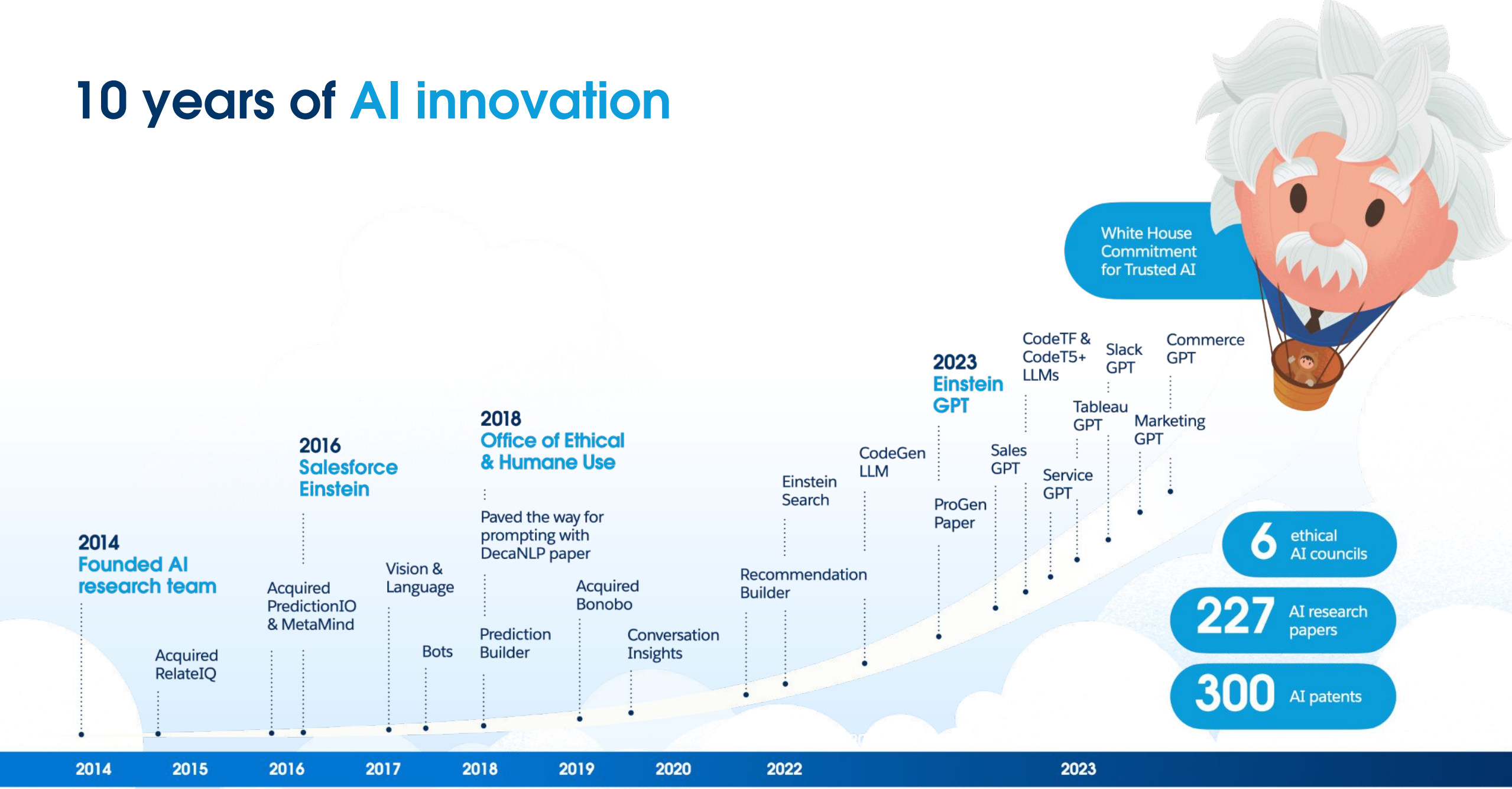
Nonprofit Cloud

Fund, deliver, and measure your impact

10 Free Licenses!!

(via Power of Us Program)

10 years of AI innovation



Data + AI + CRM + Trust

Nonprofit AI Readiness Research

AI Readiness refers to an organization's preparedness and capacity to adopt AI technologies in it's operations.

Opportunities

Nonprofits show limited AI readiness due to:

Average data management and governance requirements.

Insufficient technological infrastructure.

A **lack of trust and support** for AI technologies.

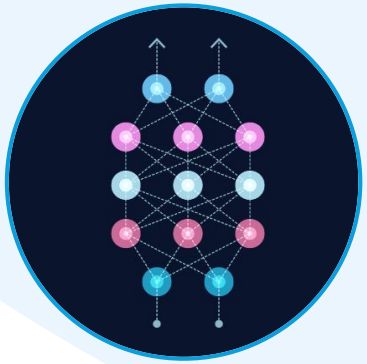
Low literacy, talent, and AI culture with a preference for off-the-shelf solutions.

Perceived value and ROI in AI Solutions but have **implementation and cost concerns.**

AI is the broad concept of having machines think and act like humans

Types of Artificial Intelligence

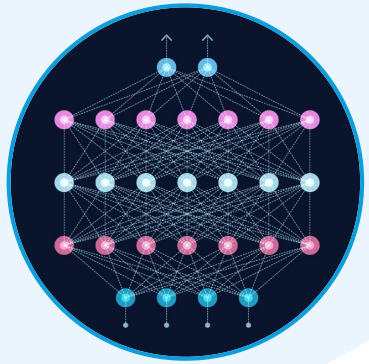
Predictive AI



Millions of parameters

- Propensity To Give
- Campaign Results
- Segmentation

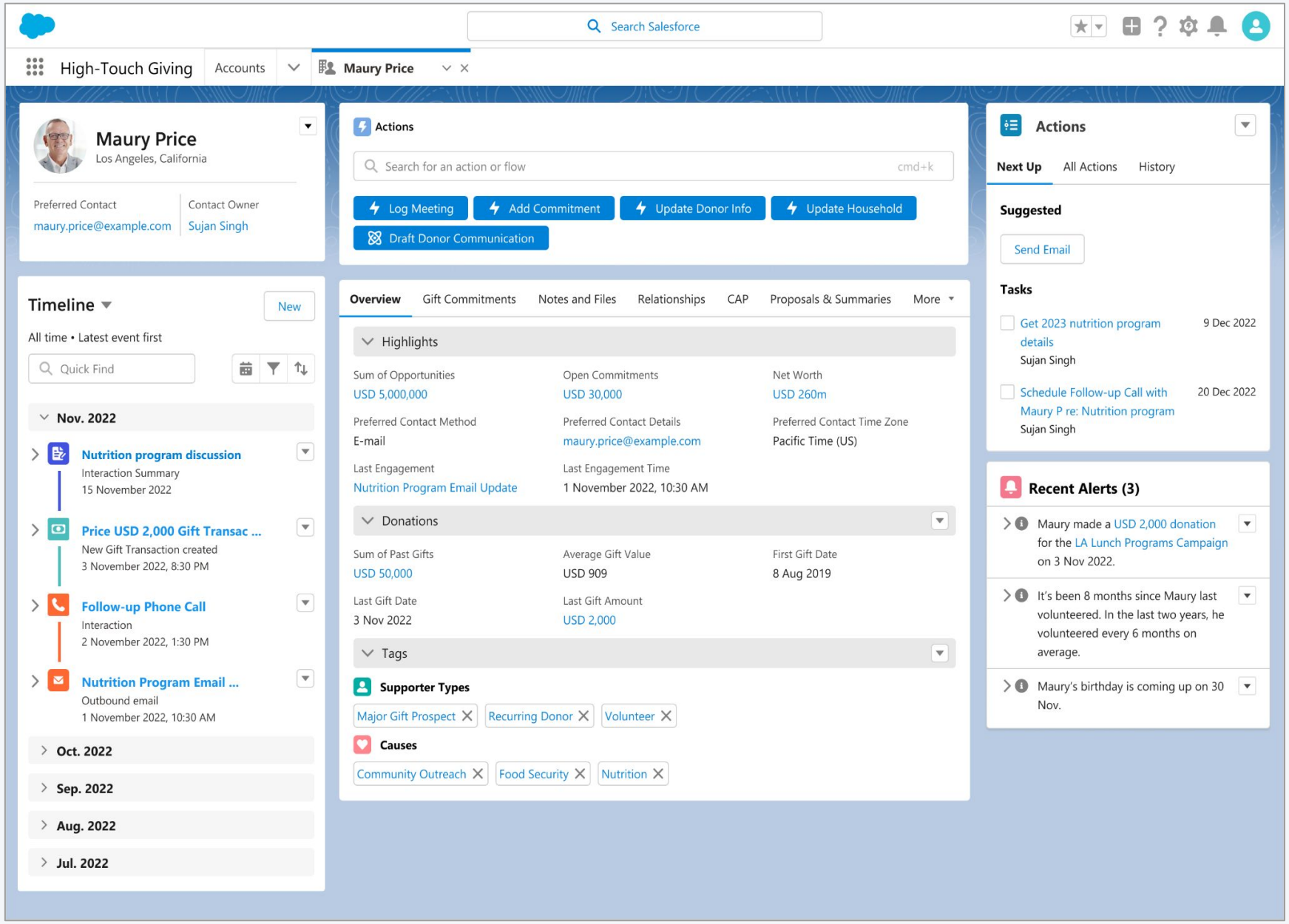
Generative AI



Billions of parameters

- Social & Web Content
- Giving Appeals
- Marketing Campaigns

A strong data strategy and foundation

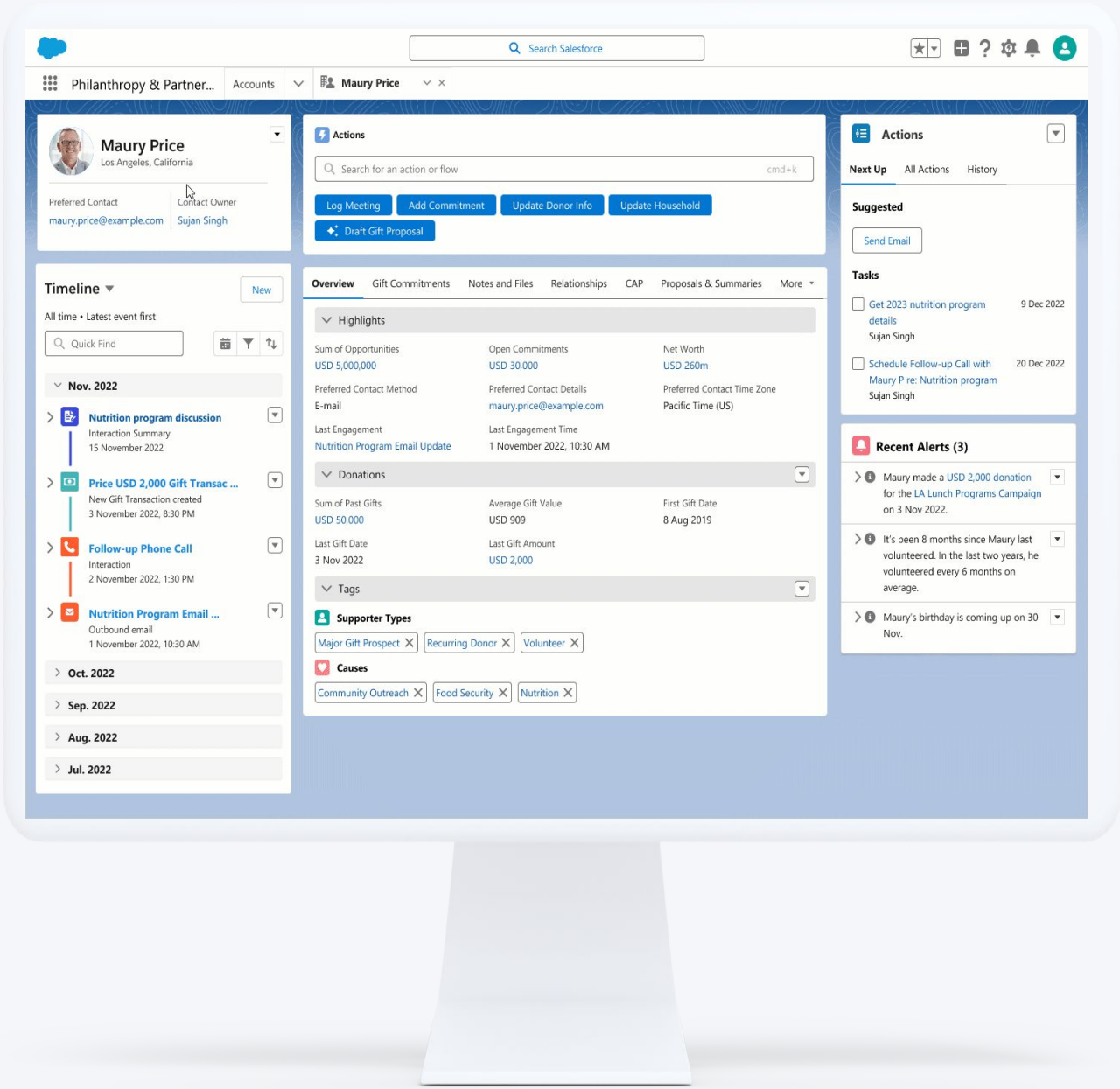


Predictive AI in Nonprofit Cloud Fundraising - Propensity

Live Today

Within Nonprofit Cloud you can use Predictive AI to predict the likelihood of individuals to become:

- A recurring donor
- A major donor
- A lapsed donor



Gen AI in Nonprofit Cloud Fundraising - Personalized Gift Proposals

Feb '24 (Pilot) **June '24 (Live)**

Einstein automatically generates content for prospective donor and funder outreach.

Einstein Assistant suggests data to include in the outreach proposal and uses the previously specified data to generate the draft. Einstein saves fundraisers hours in their day by helping to craft personalized messages. This allows fundraisers to spend more time building human relationships with donors while delivering personalized outreach at scale.

Common AI Terms

Trust

Prompts

LLMs

Security

Resources

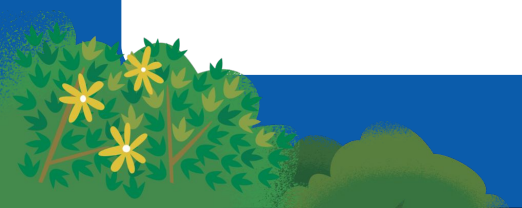
Some handy resources for those that want to learn more

How to Get Started With AI for Nonprofits

White Paper: Building a Data Management Strategy

Get Started with AI Trailhead Trails

Securing Buy-In from Your C-Suite and Board



Ask More of AI

AI Poll

Is your organisation using AI technology today?

Yes / No / Not Sure

Do you have the right culture and technology in place to make the best of AI in the future?

Yes / No / Not Sure

2023 NEW CLOUD

Nonprofit Cloud

Fund, deliver, and measure your impact

10 Free Licenses!!

(via Power of Us Program)

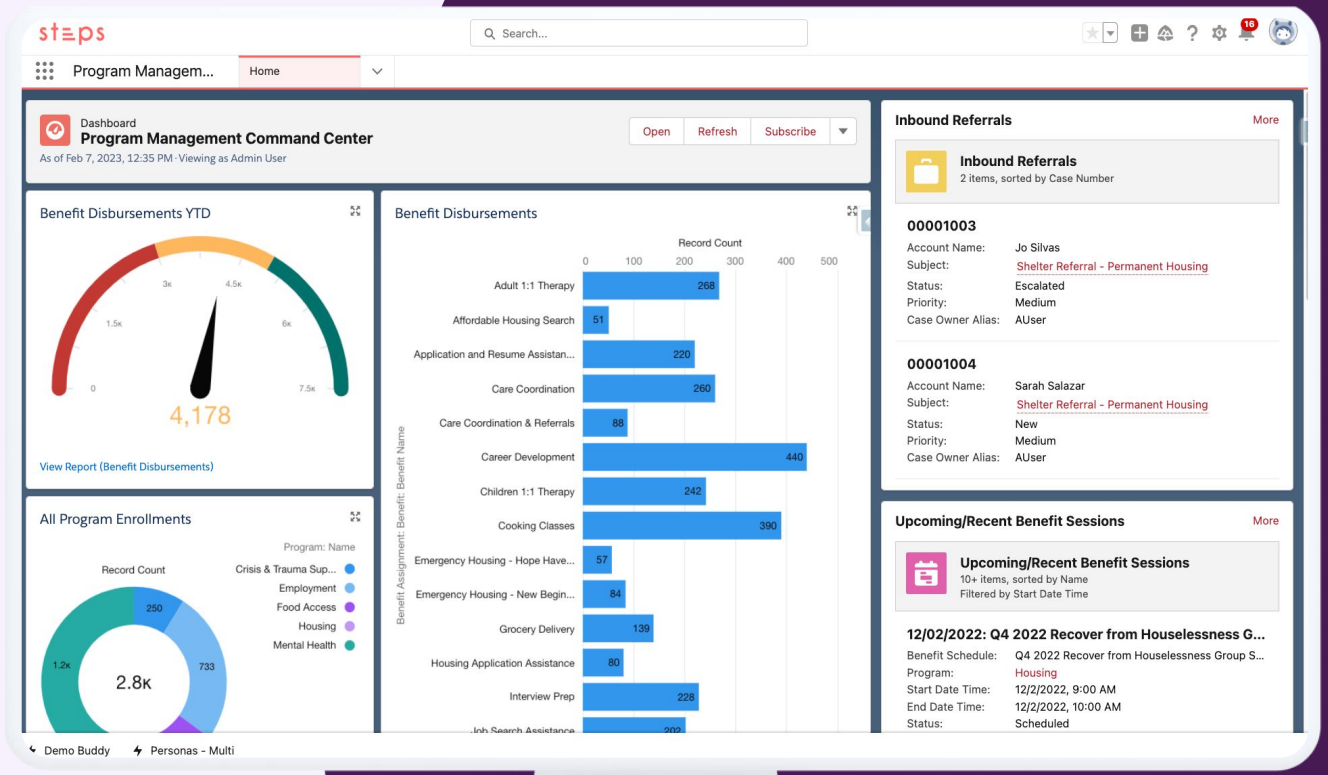
Built into the core Salesforce platform on Hyperforce, enabling local data residency & security

Enables Nonprofits to managing funding, program delivery, grants, and outcomes all in one place

Purpose Built Applications for:

- Program & Case Mgmt
- Grantmaking
- Fundraising
- Outcome Management

1. Mass Market
2. High Touch
3. Operations



Fundraising 2023 Features in Nonprofit Cloud

Mass Market Fundraising

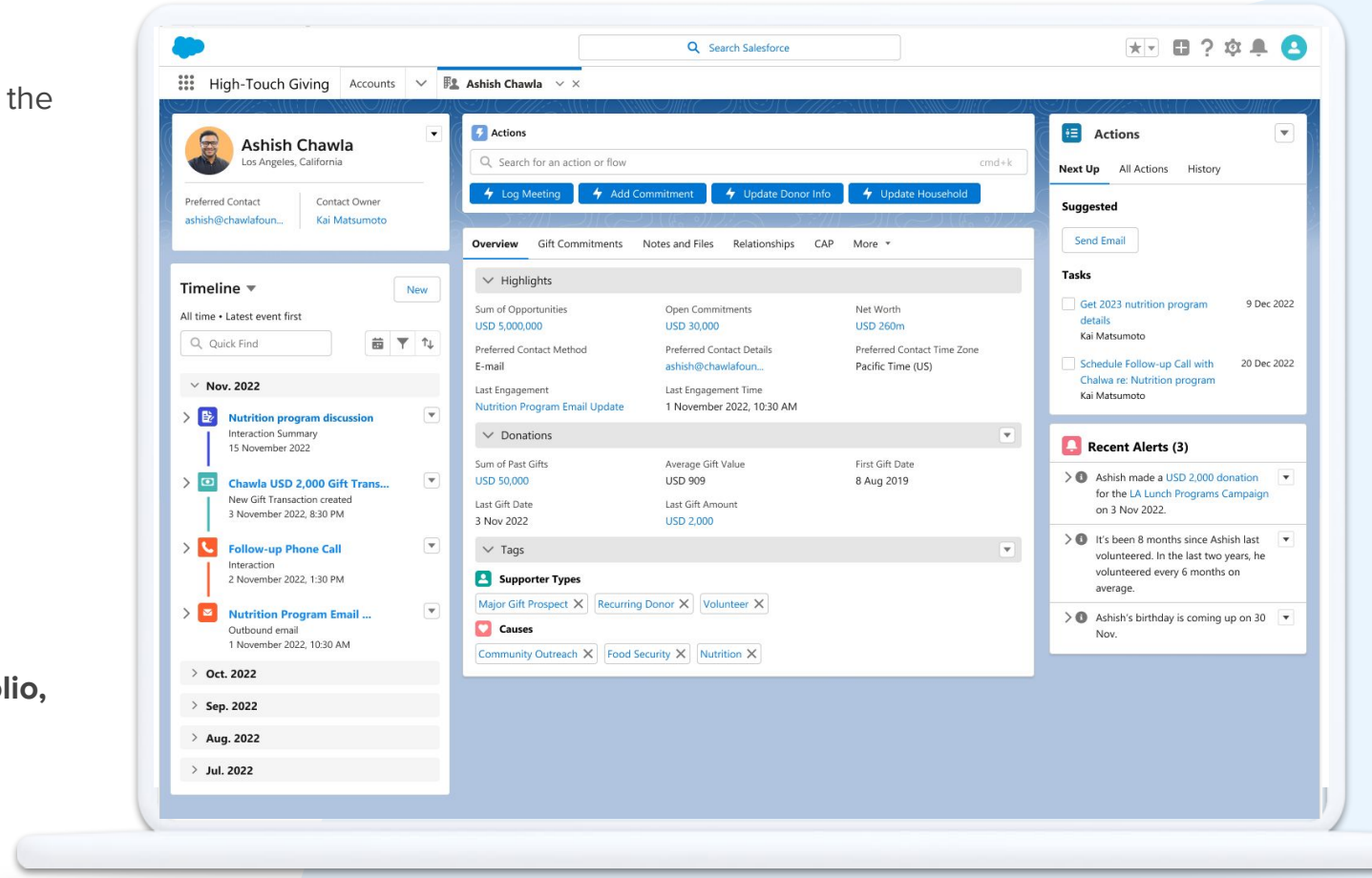
Build complex, reusable segments, and use **Source Codes** to track the performance of your appeals across segments, messages and channels.

Fundraising Operations

Run the business of fundraising with a new **Gift Data Model**. Track **Commitments, Designations,** and **Soft Credits**, process gifts with **Batch Gift Entry**

High-Touch Fundraising

Manage personal solicitation lifecycles with the **Fundraising Portfolio,** and work with a holistic view of a person with the **Donor Profile**.



Salesforce Einstein

Trusted Enterprise AI. Built for CRM.

Customer 360 Data

CRM data

External data

Engagement events

Slack knowledge

Einstein Trust Layer

Inter & intra enterprise trust

Anonymized zero retention generation

Open model ecosystem

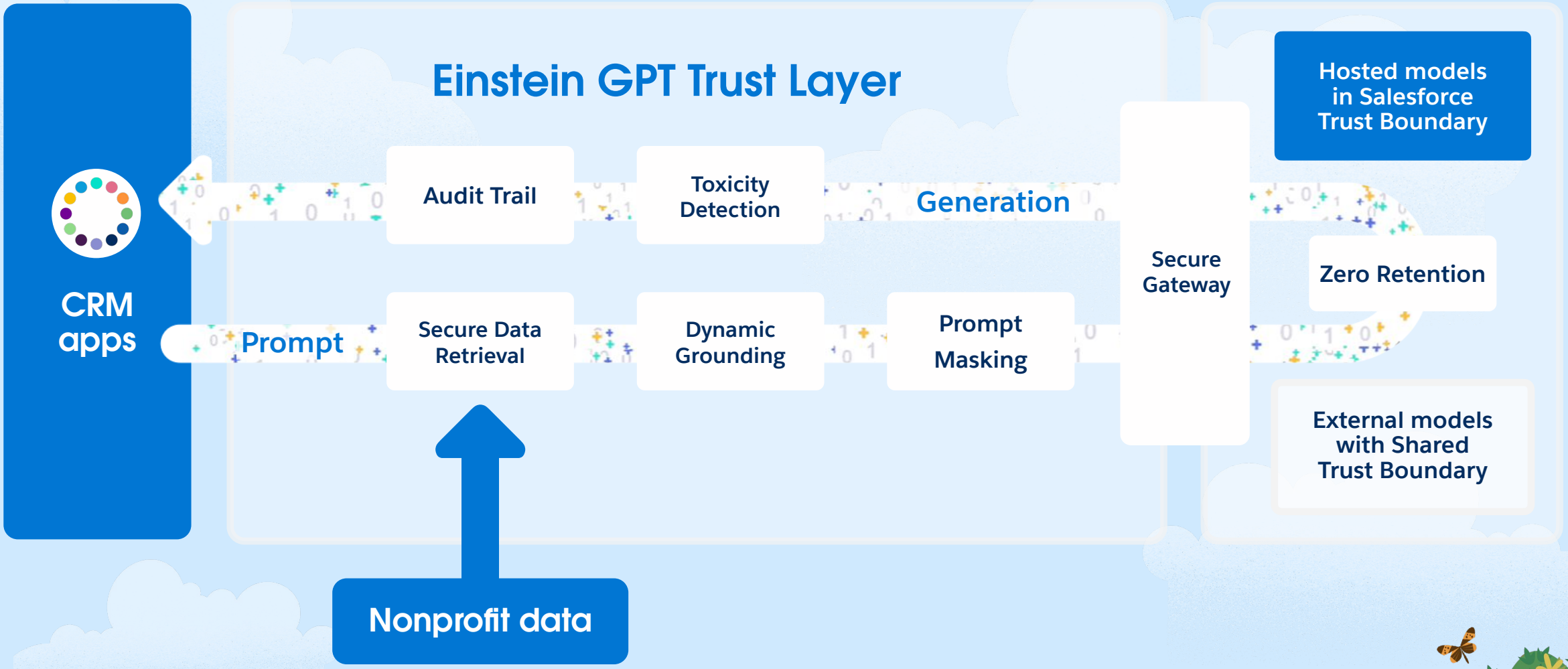
#1 AI CRM

AI for any workflow, user, department & industry

Reinforced by org outcomes

Generative AI App Ecosystem

How the Einstein GPT Trust Layer Enables Secure, Dynamic Grounding



Trusted AI Architecture

Unified Metadata Framework

Einstein 1 Platform

Apps
Sales | Service | Marketing | Commerce | Tableau | Industries

Einstein Copilot

Lightning Builders
Einstein Copilot Studio: Prompts, Actions, Models | Predictions | Flows | Apps

Einstein Trust Layer
Secure data retrieval | Dynamic grounding* | Data masking | Toxicity detection | Auditing | Zero data retention

Open Models
Our Models: salesforce
Your Models: Amazon SageMaker | Vertex AI | databricks
Any Models: aws | OpenAI | ANTHROP\C | cohere

Data
Lakehouse | Real-time | Zero ETL | Unified Profile | Data actions | Governance | MuleSoft Connectors

Hyperforce
Data residency | Compliance | End to end encryption | Net Zero

"Future functionality. Any unreleased services or features referenced here are not currently available and may not be delivered on time or at all. Customers should make their purchase decisions based upon features that are currently available."

The Einstein Trust Layer Keeps Your Data Safe

Stored Data in CRM, Data Cloud

Stored data

Structured & unstructured

Row & field-level security

Einstein Trust Layer

Secure data retrieval

Dynamic grounding

Data masking

Toxicity detection

Auditing

Zero retention

LLMs

Learned data

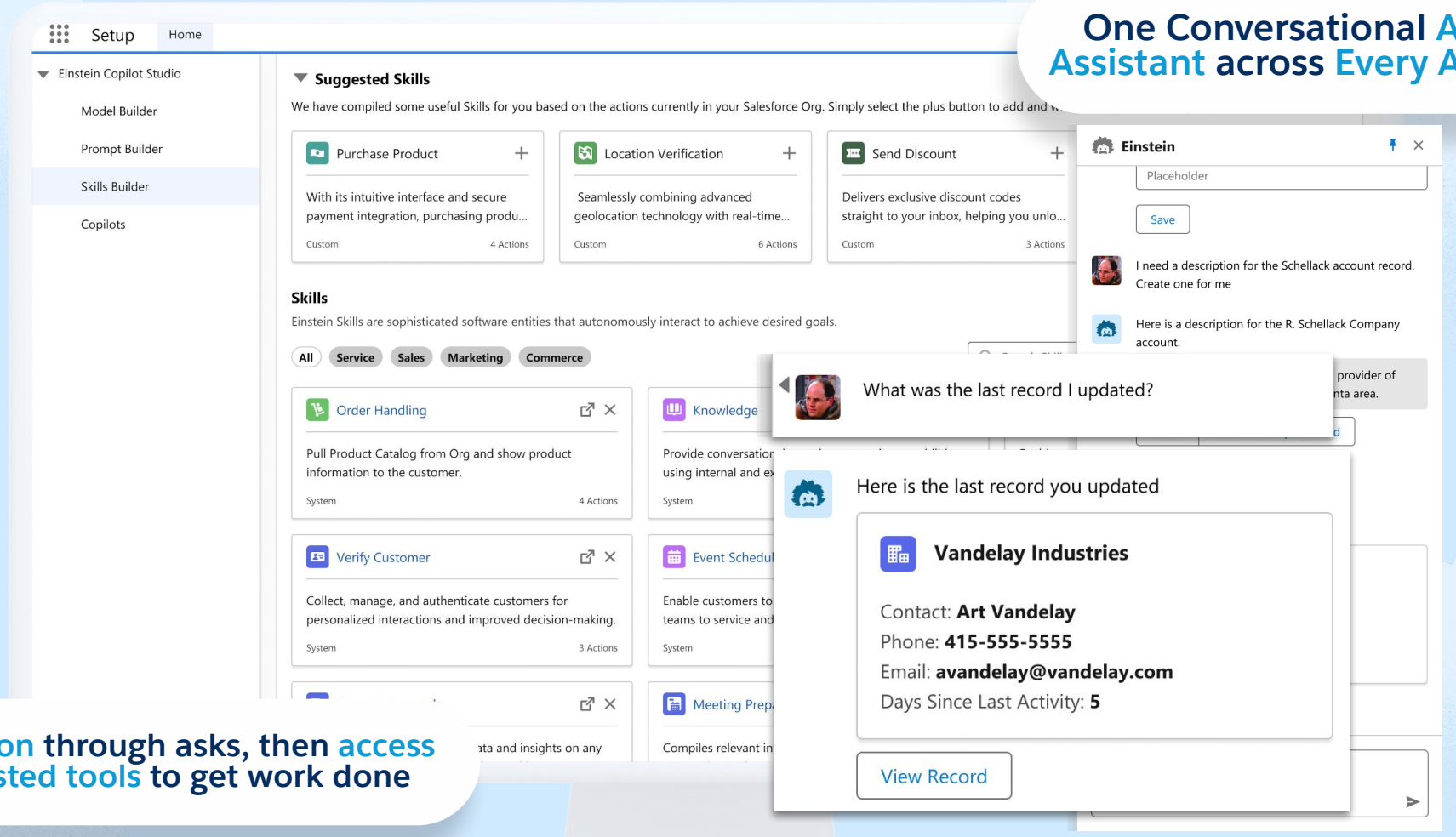
Neural network

No control over recall

Announcing

Einstein Copilot

One Conversational AI Assistant across Every App



Reason through asks, then access trusted tools to get work done

Pilot | Feb '24

Tenets of Trusted AI
Your data is not our product
Data residency & compliance
Customer control & privacy
Enterprise scale
Built-in security
Ethical in design and practice
Accurate, Safe, Transparent, Empowering, Sustainable
Trail Blazer
Managing the Risks of Generative AI
salesforce

3 Paths to Enriching Prompts with Customer Data

CRM Data

Generate trusted insights based on company-specific knowledge

Einstein GPT features automatically ground prompts in **CRM data** within each application.

Solve a case with the right knowledge article in my Service Cloud knowledge base

External Data

Create content with customer data from any platform

MuleSoft connects Einstein GPT to any external enterprise system directly.

Solve a case by surfacing order data from my ERP alongside my account's case history.

Unified, Real-time Data

Drive relevant AI with a single, up-to-date view of your customer

Data Cloud enables a unified source for data across clouds, 3rd parties, and external enterprise systems.

Solve a case using device data from S3, purchase data from commerce, and orders from ERP.

The Right LLM for the Right Task

Shared Trust

Data retained in Salesforce with joint moderation

OpenAI

GA July 19

Salesforce Hosted

Globally on Hyperforce

aws

ANTHROPIC

salesforce

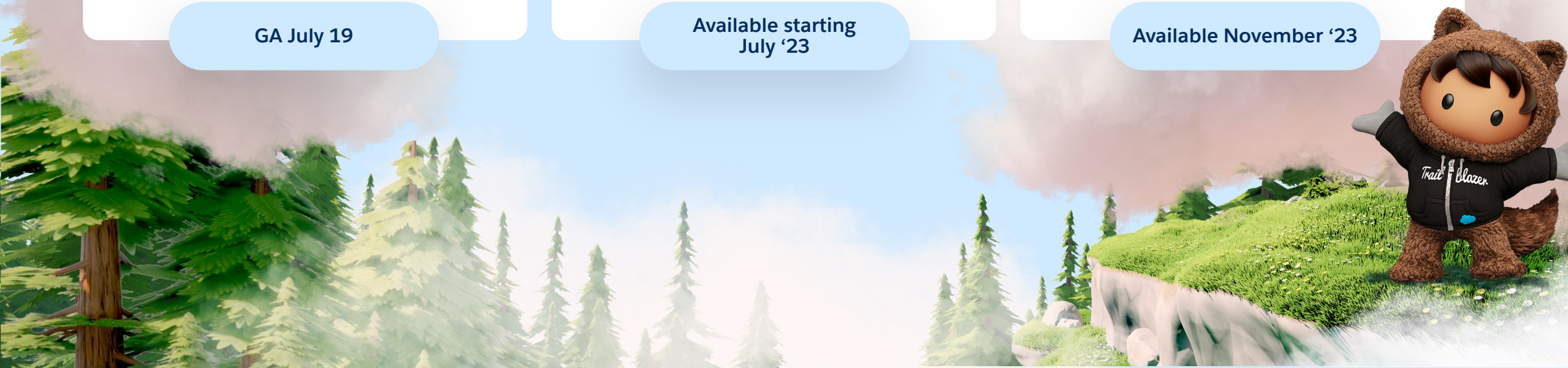
cohere

Available starting July ‘23

Bring Your Own Model

Your model, your infrastructure

Amazon SageMaker

Vertex AI

Available November ‘23