



AI Uses for Nonprofits

Empowering Nonprofits Through Innovation

Fíonta works with nonprofit teams to identify their business needs and build technical solutions to support organization growth and improvements. This includes **Einstein** and **Agentforce** use cases that are available to organizations with Salesforce to streamline workflows, save the staff time and money, and make the interactive experience easier for clients, donors, and other stakeholders.



Einstein Copilot (aka generic Agentforce Agent)

Perform general usage AI actions across an organization.

Benefits: Quick answers to common staff questions; improved staff comfort with Agentforce capabilities, limitations, and best practices without long implementation time or high cost to start.

What's Included: Enabling basic Agentforce infrastructure, turning on Copilot and deploying to end users.

Prompt Builder

Creates custom instructions based on dynamic CRM data across multiple objects to generate text or populate record fields.

Benefits: Craft warm emails to constituents and members, customized and grounded in historical data, at the touch of a button.

What's Included: Creating a template with any flows to populate the template with the right data. All work assumes that relationships between objects already exist to support summary.



Agentforce for Donor Management

Custom Agent with actions and topics associated with donation management.

Benefits: Agentic automation custom-built to serve your constituents, donors, and staff, tailored to your needs without compromising security or data integrity. Save staff time for what's important - meaningful connections with your communities and advocating for their needs.

What's Included: Building a single Agent for external or internal implementation, focused on donor management.

Einstein Lead Scoring

Smart lead scoring based on lead source, revenue, org type, and other metrics.

Benefits: Focus on the leads that are most likely to convert with data-driven scoring that's trained in your own org, not influenced by outside trends.

What's Included: Enabling and configuring the model based on available attributes. The organization must have enough historical opportunities in the system for this feature to function.

Licensing Insights: Available for Unlimited edition orgs with no additional cost.

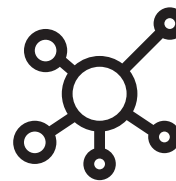
Einstein Opportunity Scoring

Smart lead scoring for opportunities, including scores in percentile likelihood of closing.

Benefits: Identify the most qualified targets and let your sales team focus on the opportunities where they can make a meaningful impact for your organization by securing funding and gifts.

What's Included: Enabling and configuring the model based on available attributes. The organization must have enough historical opportunities in the system for this feature to function.

Licensing Insights: Available for many Unlimited and Enterprise edition orgs with no additional cost.



Recommended Connections

Indicates which staff users have the strongest connections to contacts based on tracked activities.

Benefits: This functionality is helpful for larger organizations or instances where different staff members interact with the same contacts, providing context around relationships and insights into how to improve building and retaining those relationships.

What's Included: Feature activation and addition to contact and account page layouts. Requires usage of Einstein Activity Capture to provide optimum value from the tool.

Licensing Insights: This feature is included in Unlimited edition orgs.



Einstein Activity Capture

Track email conversations and meetings directly against Salesforce contacts, accounts, etc.

Benefits: Help streamline communications with members and donors to present a united front.

What's Included: Enabling Einstein Activity Capture in collaboration with your IT team.

Automatic Contact Creation

Automatically creates contacts and Account-Contact Relationships when a Salesforce user emails a valid email address that doesn't match an existing contact.

Benefits: Ensure you never lose a valuable contact in your inbox. Ensures that all emails are tracked and centralized in Salesforce to improve visibility across teams.

What's Included: Enabling of Automatic Contact Creation; required prerequisite Einstein Activity Capture setup.

Einstein Forecasting

AI-enabled forecasting that predicts pipeline volume closure, tracking against KPIs, closure dates, etc.

Benefits: Enhanced forecasting and analysis of opportunities driven by your own historical data.

What's Included: Enabling Einstein Forecasting on all opportunities or a segment of opportunities.

Licensing Insights: Available in many orgs with no additional licensing costs, but useful only for organizations already using opportunities (trade associations, etc). Requires some profile updates to allow forecasts to access required data. Forecasting requires 12 months of data.

Buyer Assistant

An Einstein Bot that replaces web-to-lead forms with a conversational tool. .

Benefits: Shortcut the time required to connect prospective members, sponsors, and donors from your website to your sales team

What's Included: Configuring and testing the tool, which also enables Einstein Bots and Omni-Channel.

Licensing Insights: Conversation volume limited to 25/user/month.



Einstein Email Insights

Identifies keywords in emails tracked via Einstein Activity Capture and spotlights areas where a specific response or action is recommended. Includes Einstein Activity Metrics (Activity 360), which highlights the date of the last tracked activity on a record when Einstein Activity Capture is enabled.

Benefits: Highlight key content in emails tracked in Salesforce, saving your time for what matters most, such as responding to your members and constituents quickly and appropriately.

What's Included: Enabling Email Insights and Activity Metrics.

Einstein Relationship Insights

Provides recommended relationships and connections between account and contact records.

Benefits: Improve outreach attempts to lapsed members when a primary contact has left by identifying other potential contacts to receive membership outreach.

What's Included: Initial setup and license assignment in collaboration with client admins.

Licensing Insights: Basic is included for free for Unlimited orgs.



Einstein Next Best Action

Recommends next actions based on pre-configured recommendation options. 5K POPM requests included for many Salesforce editions.

Benefits: Quick identification of the predicted most effective outreach for your key members, constituents, and sponsors.

What's Included: Turn on feature and release on appropriate page layouts, including flow setup and testing.

Einstein Case Classification and Routing

Modeled on data from previous closed cases, Einstein can populate fields like Priority and others in a recommendation component. Provides more robust routing and escalation rules based on skill matrices, queue assignment, etc., with training over time based on patterns from previous closed cases.

Benefits: Sort cases and send them to the right team member with ease, smoothing the path from case submission to getting care plans in motion for constituents in need.

What's Included: Setting up the model, making additions to the service console, and training staff.

Licensing Insights: A limited implementation is available for existing Service Cloud users.

Einstein Bots

Automated chat bots with configurable actions.

Benefits: Test out externally available Salesforce AI with quicker time to launch and freedom from consumption costs, for straightforward use cases.

What's Included: Creating and testing one Einstein Bot, and releasing to production. Train staff on ongoing maintenance.

Licensing Insights: These are constrained versions of Agents (e.g. cannot have full conversations), which don't have consumption costs.

Put AI to Work

Fionta helps nonprofits identify practical, responsible AI solutions that streamline operations, strengthen relationships, and free staff to focus on building deeper connections with donors, members, and constituents.

Let's talk.