What Tracey Did:
Chicago Community Commons Sprint and Nonprofit Dreamin 2024

2023.11.21

Tracey Braun

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After 20+ years in the nonprofit sector, I'm now a certfied Salesforce professional using my database administration, data analysis, and community development skills to help nonprofits do what they do best – change the world.

Salesforce Trailblazer Profile   **Meet Nonprofit Cloud trailmix**

Tracey Braun

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DTG. DIGITAL TRANSFORMATION GROUP

- LinkedIn
- Trailblazer ID
- Website
- DTG Website

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Trailhead

ALL STAR RANGER

708 Badges   **311,700** Points   **121** Trails

CERTIFIED Administrator

CERTIFIED Marketing Cloud Email Specialist

CERTIFIED Platform App Builder

CERTIFIED Business Analyst

CERTIFIED Nonprofit Cloud Consultant

CERTIFIED Sales Cloud Consultant

Salesforce.org Commons Community Sprint

[Salesforce.org Commons & Sprint Events (Trailblazer Community)](#)

[Community Innovation in Chicago](#)

- ➤ October 30 – 31, 2023
- ➤ Chicago, IL, USA
- ➤ 98 sprinters (83 in person and 13 virtual), 50% new sprinters
- ➤ Work done on 10 projects over 2 days
- ➤ Projects continue between Sprints
- ➤ 2 new Best Practice Groups:
  - ➤ Deployment
  - ➤ Nonprofit Cloud

- Live Projects

  - Declarative Lookup Rollup Summaries (DLRS) – interface to rollup data between records where Salesforce can't do it natively

  - Salesforce Indicators – Visually highlight important data at a glance

  - Summit Events App (SEA) – Events management for paid, free, group, guests, and individual attendee events

- In Development Projects

  - Membership Done Better (live Winter 2024) – common data model and support automations for managing memberships in Salesforce

  - AI Prompts for Nonprofits – making AI tools like ChatGPT easier to use for nonprofits

  - Grants Content Kit – stores and organizes grant proposal content in Salesforce

Nonprofit Dreamin

Nonprofit Dreamin (Main Website)

➤ November 1 – 2, 2023

➤ Chicago, IL, USA

➤ A dedicated, inclusive community to collaborate, build relationships, and learn within the Salesforce ecosystem.

➤ Created for, and by, nonprofit professionals who work with Salesforce

- I watched the release webinar, now what? – Sandi Nuss Zellner
  - CREATE
    - Calendar – Know when changes are happening; block your calendar to give time for learning and testing
    - Research – Learn the details of what is coming and how it could impact your org (positively and negatively)
    - Experiment – Main sandbox on same version as PROD; build, test, and deploy
    - Align – Prioritize features with business value; find quick wins; make a release plan; define roles and responsibilities for the whole team (not just the Salesforce team)
    - Tell – Keep your team informed of changes and important dates
    - Enhance – Complete a readiness release retrospective so you know what worked, what didn't, and what to do next time

- Cracking the Code: Introducing SOQL for #AwesomeAdmins – Mark Jones
  - Query and extract data for reports, dashboards, and automation workflows
  - Pros- no report types; can sort up to 4 fields; can limit number of records
  - Great for ad hoc reporting
  - Basic Syntax:
    - Select <select_list> - field(s)
    - FROM <Object_API_Name> - object(s)
    - WHERE [Add clause]
    - GROUP BY [Add clause]
    - ORDER BY [Add clause] -sort
    - LIMIT BY [Add clause] - number of records you want to see
  - LWC SOQL Builder – free tool that allows you to download SOQL queries as a CSV

- Admin's Guide to Crafting Effective Scenarios for Salesforce Testing Success – Cassie Supilowski
  - Shift Left – The cost to fix an issue gets progressively higher the later you solve it.
  - Testing can help users understand the complexity of their request
    - Your estimate should be configuration hours + testing hours
  - Testing includes:
    - Positive testing – what you want to have happen actually happens
    - Negative testing – what should not happen doesn't happen
    - Edge cases – testing the thing you assume no user will do
  - Be a tester, not a checker – think creatively about how people are using your system and test from that knowledge base

Nonprofit Cloud (NPC) Updates

- Salesforce team expectation: not everyone is going to move to Nonprofit Cloud
  - There are 54K nonprofits registered through the Power of Us
- At the same time, no new NPSP updates expected in Salesforce Releases
  - Community Commons Sprint projects fill some of that gap
- Migration should be a choice based on your organization's needs
  - Need to look at what you want to do, data models, and licensing
- More information and support about NPC are planned now
  - Enablement and sharing sessions mid-December (Trailhead community)
  - 2024 focus is on migration for those who are interested
    - NPSP-to-NPC Migration Pilot Project
    - NPSP-to-NPC Migration Toolkit launch
    - Partner Migration Services support
  - Tracey's Meet Nonprofit Cloud trailmix (NPC badges)

Final Thoughts

- Plan before you go
  - Top priorities:
    - Nonprofit Cloud
    - Presentation for you folks ❤️□
  - You can't be everywhere so just accept FOMO and keep going

- Take advantage of events to learn and network BUT also pace yourself
  - Many social events in a short period can be a recipe for burnout
  - Standing on concrete isn't my favourite thing – move around a lot
  - Save the in-depth conversations for another time

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