**QuickStart Questionnaire**

We are looking forward to working on a QuickStart engagement with your organization. To help us get a head start on understanding how your organization works and the specifics of your project, please provide as much of the following information as possible. In addition to this questionnaire, we do expect we will need to have follow-up conversations regarding your requirements.

**General Project Overview**

1. Please provide the following organization and contact information:
	1. Organization Name:
	2. Website:
	3. State of Incorporation:
2. Please list the name, title, and email address for the primary contact for QuickStart implementation:
3. Are you the contract signer? Yes/No
4. If not please list the name, title, and email address of the contract signer:
5. Who is leading the project and what is his/her role in your organization?
6. What is your desired start date for the one-week QuickStart implementation? (Note that QuickStarts run from Monday-Friday.)
7. What system(s) are currently in place to track the information you are planning to track in salesforce.com? (e. g., Microsoft Excel, Microsoft Access, paper forms, FoxPro, etc.)
8. What is your current email system?

**Salesforce.com Licenses**

How many salesforce.com licenses did you request from the Salesforce.com Foundation? Please list the license users in the table below, and add rows if necessary.

**First Name Last Name Email Address**

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| First Name | Last Name | Email Address |
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**Desired Functionality**

1. **Constituent tracking**
	1. Please list and describe the types of constituents you track (e.g. donors, volunteers, partners, media partners, etc.)
	2. List the different types of information you need to track for each of the types of constituents listed above, beyond the Standard Salesforce field list. Please reference the data import template. On the Contact worksheet, the column headers represent the standard fields available for tracking contacts/constituents.
2. **Fundraising**
	1. Please indicate which, if any, of the following you want to track in salesforce.com:
		1. Individual Donations
		2. Major gifts
		3. In Kind gifts
		4. Pledges and recurring donations
		5. Grants received by your organization

\*Please note that import of donation data is not included in the QuickStart project scope.

 Payment tracking is not included in the QuickStart project scope.

1. **Program management**
	1. Would you like to track your Programs in Salesforce? If so, please list the programs you would like to track.
2. **Outreach / Marketing**
	1. Do you plan to track mail and email campaigns in salesforce.com? If so, please describe.
	2. Do you want to track events and attendees in Salesforce.com? If so, please describe.
3. **Reporting and analytics.** Do you have specific reporting/analytic requirements beyond standard contact, activity and donation/grant reports? If yes, please attach a sample report, a mockup, or a description of your reporting needs.
4. **Security**. Does access to any of the categories of data (contacts, organizations, donations, etc.) need to be restricted? If so, detail which users defined above should NOT have access to particular data.
5. **Data migration.** We have provided templates for you to add your data after you export/extract it from your existing system. You will need to modify/adjust data as necessary so it will match what is expected for the upload/import into salesforce.com. The data export/extract must be completed prior to starting the QuickStart engagement. You may need to make modifications to the data in this template during the engagement to accommodate the specific design that we implement.

 Please list all databases and other data repositories (spreadsheets, paper, email contact lists), describe their use, and indicate whether you would like their data migrated to salesforce.com:

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| --- | --- | --- |
| **Data Source** | **Data Type** | **Import Data into Salesforce Y or N** |
| Example: Outlook Mail  | 1500 Contacts for Exec Director | Y |
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1. In the table below, please list all databases and other data repositories (spreadsheets, paper, email contact lists), describe their use, and indicate whether you would like their data migrated to salesforce.co

Are there any other data migration needs we should be aware of (even if they may be out of scope for the QuickStart)?

Are there other specific considerations you might have that will help us define the scope of this project?

Thank you for your responses. We look forward to working with you in the very near term on your QuickStart project.