

Post-Keynote Recap for Nonprofits: Data Strategy and AI

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Speakers:

Speaker A - 27.56%

Speaker B - 37.22%

Speaker C - 35.22%

Notes:

- John Townsend, CIO of the National Trust, and Ifar Jansen, senior area vp, public sector nonprofit. Having an amazing dream for us so far. Okay, I love to hear it.
- Digital transformation of how we can deliver through digital. Really providing that personal touch, which is so important. It all starts with our audience, of course. And this is an enabling capability for us to deliver on our charitable purpose.
- Working together as a community, as a group, really helps you to implement and think about the business change. No matter how fast or how new the technology is, we always need to be mindful of that human component. To drive impact, you must be as efficient as possible.
- A strong theme for the keynote is AI for good. How can nonprofits enable the core

mission of AI with technology? We need to be careful that the industry of nonprofit is missing the boat, leveraging the technology.

- We need to do more with less in the nonprofit sector, says Eiffel. For some nonprofits, that enabling them to reach greater. Most nonprofits are trying to deliver benefit for people rather than profit for shareholders. Salesforce can make that easy.

- A lot of nonprofits are still hesitant to engage with AI. The best thing that we have seen working is to start small in non critical areas of the business, to drive your successes. It's clear that AI and technology are essential allies in amplifying the impact of nonprofits.

Speaker A

00:00:00

Hi, everyone, and welcome. I'm Shaleah Shipman and we're honored to have with us John Townsend, CIO of the National Trust, and Ifar Jansen, senior area vp, public sector nonprofit. So let's dive right in. Hi, how are you all doing?

Speaker B

00:00:15

Really good, thank you.

Speaker A

00:00:16

Having an amazing dream for us so far.

Speaker B

00:00:18

It's been great.

Speaker A

00:00:18

Okay, I love to hear it. So, John, the National Trust has built a solid foundation for a future with AI over the last few years. Can you share some insights on your digital transformation journey?

Speaker B

00:00:31

Yeah, sure. For those who don't know the National Trust, we're Europe's largest conservation charity. We look after historic and outdoor places so that people and nature can thrive.

Speaker A

00:00:40

Yes.

Speaker B

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Um, so for us, we're an organization, we have almost 6 million members, 25 million paying visitors every year. But we had a lot of legacy systems. Our data was in a mess and we didn't really understand what our audiences really needed from us because we just didn't have those insights from the data. So we began our journey and, uh, that involved us migrating from a legacy platform, almost 100 million customer records, and all of that sort of complexity. Um, we implemented, uh, firstly on the core platform using nonprofit success pack. In the start, we then m built out experience cloud through our digital platform so that people could engage directly with us. And from there we implemented marketing cloud to engage with our audiences. But importantly, we also put data cloud in place so that we built that foundation. We're able to unify the view of our supporters and actually understand what they needed from us. And that really was the beginning of our journey to actually think about how can we segment audiences and start thinking about reaching new audiences. Um, and, you know, all of that for us has been enabled through implementing the platform.

Speaker A

00:01:51

Well, that's amazing. And you're spot on. We're talking so much about data cloud and innovation at this year's Dreamforce. Selfishly, this excites me because I'm a product marketer for data cloud. So I love to hear that you guys are already thinking about the future and how to progress.

Speaker C

00:02:04

And he's a little bit modest because what they have obtained already within their internal organization with National Trust is really trailblazing. And, um, it's not only the technology that you have brought to life, but as well how you have cultivated the whole organization in that digital transformation mindset. And of course, thank you as much for everything you do together with us, because it has been a long journey and it always goes ups and downs, but it is really amazing what you have achieved already in 18 months only.

Speaker B

00:02:34

It's been an absolute pleasure. And you're right, this is an enabling capability for us to deliver on our charitable purpose, on our cause.

Speaker A

00:02:42

Absolutely.

Speaker B

00:02:42

And actually get people involved and engage with it. And it's that, uh, transformation of how we can deliver through digital that really, this is the platform that's enabled us to start thinking that way and also.

Really providing that personal touch, which is so important. Right. No matter what sector we're talking about, everybody cares about recognizing that whoever they're working with, who they are, and they're delivering on those needs and expectations.

Speaker B

00:03:05

Absolutely. It all starts with our audience, of course. And if we don't understand who our audience are and actually through personalization on marketing cloud, we can actually reach them with content that they're interested in.

Speaker A

00:03:17

Absolutely. Uh, as opposed to guessing.

Speaker B

00:03:19

Exactly.

Speaker A

00:03:19

That doesn't get us very far.

Speaker B

00:03:20

No.

Speaker A

00:03:21

So tell us more. I'm sure many viewers can benefit from some of your experiences.

Speaker B

00:03:26

Yeah, I mean, for us, I think really thinking through the implementation journey, making sure we get everybody involved in the organization, this is not something that technology delivers. This is how working together as a community, as a group, really actually helps you to implement and think about the business change that you're trying to enable. For us, that was getting all of our membership teams involved, our fundraising teams, our marketing teams, and then as technology, um, and data, we were able to think, well, how are we going to do this together?

Speaker A

00:04:00

Correct.

Speaker B

00:04:00

But it's not just within us. It's working with Salesforce, with IFR and the team, but also our

implementation partners and thinking, how can we get this done?

Speaker A

00:04:09

Um, the human piece, we never really lose. Right. It's the change management. No matter how fast or how new the technology is and the innovation is, we always need to be mindful of that human component.

Speaker B

00:04:20

Absolutely. Because this is all about people. It's both the people we want to engage with, but the people who've got to deliver it as well. So we've all got to get involved.

Speaker C

00:04:29

And I think it's fair to say that within the nonprofit industry, the resources are more limited than in other industries. And for that reason, there's a little bit more pressure. We, uh, need to be even more efficient because the main purpose is to drive impact. And to drive impact, you need to be as efficient as possible. So the potential of technology and the potential of artificial intelligence is amazingly important for the industry. Now the question is, how do you get there together with your organization?

Speaker B

00:04:57

Yeah, I think for us, though, the important thing is we built the foundation, and that's what data cloud gives us. But also now thinking about, well, how can we make ourselves more efficient, but also deliver more, reach new audiences?

Speaker A

00:05:11

And I think that's a critical question that so many people want the answer to. So, ifar, uh, I'm going to ask you this one. So, a strong theme for the keynote is AI for good. How can nonprofits enable the core mission of AI with technology?

Speaker C

00:05:26

Yeah, so, and I was referring to it a little bit as well, and it was in the keynote as well, all around. How can we leverage new technology whilst we are focused on impact, we're focused on making a change in the world. Um, and how do we then make sure that a less mature organization, that the nonprofit is, in comparison to full profit organizations from a technology perspective, is going to adopt that technology and see it as an advantage rather than a disadvantage?

Speaker A

00:05:54

Absolutely.

One thing is for sure, AI is not going to move away. So it's a matter of how do I adopt it? We need to be careful that the industry of nonprofit is missing the boat, leveraging the technology. So I think that what we can do together, and it's good that we do it step by step to look at the maturity curve of the nonprofit organization you were talking to, and how we step by step, can bring them on that journey, but we need to make that mindset change what the good thing is about national trust, and you were referring to it as well. It's not around the technology. It's bringing your culture to life. It's bringing the people to life into that next phase. And AI is not going to replace the individuals.

Speaker A

00:06:34

Oh, absolutely not.

Speaker C

00:06:34

Absolutely not.

Speaker A

00:06:35

That's not how it's designed.

Speaker C

00:06:36

What is going to happen is that the individuals can focus on the more critical things, so we can even drive more impact while we increase our revenue and our productivity. And increase productivity.

Speaker A

00:06:46

Exactly. Well, is there anything that you want to add here, John? Because I would love to hear your insight.

Speaker B

00:06:51

One of the other things is Eiffel's exactly right, that, you know, we need to do more with less in the nonprofit, um, sector, and for some nonprofits, that enabling them to reach greater. Most nonprofits are trying to deliver benefit for people or for nature or whatever their mission is. It's about delivering benefit, necessarily, rather than profit for shareholders. So if you're coming at it from that, there's a huge opportunity with AI to actually do that, to enable them to extend their reach, but also making them therefore more productive and delivering ever more benefits for whatever their, I, you know, charitable cause is. One of the key things I think, though, that Salesforce can do to help that is to make it easy, make it accessible for those organizations, because they're never going to. We heard Laurie talking about building out large language models.

Where do I start there? Yeah. What are you talking about?

Speaker B **00:07:45**

Spend all their resources, time, and energy doing that. So if Salesforce can make that easy, that makes it more digitally accessible for them to actually benefit.

Speaker A **00:07:54**

Absolutely. I couldn't agree with you more. Were you going to say something?

Speaker C **00:07:57**

Yeah, I just wanted to say. And that was, yes, it reversed yesterday around the big announcement, don't do it yourself. We will come up with those models, with those problems that will help to support the nonprofit industry. And it was amazing to see that already happening in the nonprofit cloud today.

Speaker A **00:08:12**

Yes.

Speaker C **00:08:13**

So I think we're on the right track together.

Speaker A **00:08:15**

Well, let's talk about that big announcement. Right. That took place. So there were some big announcements that, that took place during the nonprofit cloud on AI keynote, and a lot of nonprofits are still hesitant to engage with AI, and I think we could fill in the blank there. I'm sure there's lots of companies and people in general that are a little hesitant. Um, and they have valid concerns around security, which I think makes complete sense. How can Salesforce help here? Ivar, I'm going to pitch this.

Speaker C **00:08:41**

Okay, that's fine.

Speaker A **00:08:43**

I think it's fair.

Speaker C **00:08:44**

Yeah, maybe it's fair. Having said that, even more important in the nonprofit, um, industry, who's serving vulnerable environments, nine out of ten. We need to be careful, but we

need to be optimistic as well. It's two sides of the same coin where we need to look at, okay, what are the risks? How can we mitigate risks, and what are we doing together? The best thing that we have seen working, and it was in the announcement as well, is to start small in non critical areas of the business, to drive your successes. As soon as you have the successes, you see that people are going to adopt it as well, and you can find into more critical parts of the business. As I said earlier on, one thing is for sure, AI is not going to disappear any longer. So how do we together, step by step, bring it into the world of National Trust and other nonprofit organizations?

Speaker A

00:09:39

I love that point. I think you made an excellent point and hit the nail right on the head. Thank you so much. Um, I appreciate, John, you being here, ifaR. Your contribution to this conversation as well has been invaluable. Thank you for sharing these insights. It's clear that AI and technology are not just tools but essential allies in amplifying the impact of nonprofits. So thank you so much. I appreciate you both for stopping by. Enjoy the rest of your time at Dreamforce. It's been a pleasure.

Speaker C

00:10:04

Likewise.

Speaker A

00:10:04

Absolutely.