



Prudence B2B

Transforming Industries, Empowering Communities



800 Park Offices Dr, Suite 3317
Research Triangle Park, NC 27709, USA



info@prudenceb2b.com



www.prudenceb2b.com

NONPROFIT DIGITAL TRANSFORMATION

Community Bridges Inc.

Prudence B2B implemented Salesforce NPSP to replace fragmented manual processes with a centralized platform for constituent, client, case, donor, and donation management.

ENGAGEMENT	SECTOR	PLATFORM
Pro Bono Digital Transformation	Nonprofit & Community Services	Salesforce NPSP

THE CHALLENGE

Community Bridges relied on manual processes and tools such as Google Forms and Google Sheets to collect and manage information about staff, clients, donations, donors, and cases. This made information difficult to consolidate, maintain, and report on consistently.

OUR APPROACH

Prudence B2B configured Salesforce NPSP as a unified nonprofit CRM, adapting standard objects and page layouts, defining client and application-management capabilities, and establishing a structured foundation for intake, case tracking, fundraising, reporting, and future automation.

SALESFORCE CAPABILITIES DELIVERED

- Account and contact management adapted to Community Bridges' data requirements.
- Client records supported through Salesforce contact structures, record types, and tailored page layouts.
- Application-management foundation for website intake and external-user submissions.
- Donor and donation tracking for grants, individuals, and organizations.
- Case-management foundation for consistent client-service tracking.
- Customized reports and dashboards for operational and fundraising visibility.
- User access, roles, permissions, training, deployment, and post-production support.

BUSINESS VALUE

- Centralized core nonprofit information in one Salesforce environment.
- Reduced dependence on disconnected spreadsheets and manual recordkeeping.
- Created a structured view of clients, donors, donations, applications, and cases.
- Improved the foundation for reporting, dashboards, data quality, and accountability.
- Established a scalable platform for consent automation, electronic signatures, and community-based intake.
- Provided a practical digital-transformation foundation that can evolve with Community Bridges' programs.

TECHNOLOGY & CAPABILITIES

Salesforce NPSP | Account & Contact Management | Client & Case Management | Donor & Donation Tracking | Application Intake | Reports & Dashboards | Training & Adoption

Need a practical Salesforce foundation for your nonprofit? Prudence B2B delivers assessments, implementations, improvement sprints, and managed support.



Prudence B2B, LLC
NC SOSID: 2395132
UEI: Q35NE2L3YPH7
CAGE: 9EV82



+1 (984) 400-5724



www.prudenceb2b.com



Salesforce
Consulting
Partner



ISO 27001
Certified



ISO 9001
Certified



Salesforce
AppExchange
Partner