

# Self-Service Portals for a New Era





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## What is Experience Cloud?

If you've ever logged into a portal, collaborated with an online community, or updated your profile details online, you have likely used Salesforce Experience Cloud.

Experience Cloud can be used to create intuitive and user-friendly portals embedded in your website. This tool connects constituents with your organization and with each other, seamlessly funneling key information into your Salesforce org and measuring engagement for easy reporting.



# Salesforce Experience Cloud can be used if your org is looking to:



Create a collaborative portal environment for clients, partners, volunteers, or other key stakeholders



Empower constituents to manage their own profiles, apply for grants, or pay dues



Establish a knowledge library where constituents can search for and access materials



Experience Cloud self-service portals can reduce the workload of nonprofit staff, increase transparency, and improve overall efficiency. Moreover, the tool provides features such as AI-powered chatbots, self-help knowledge bases, and personalized recommendations that can improve the user experience and make the portal more functional, leading to better engagement and stronger relationships.

Next we'll explore these benefits of self-service Experience Cloud portals by walking through nonprofit Keep America Beautiful's digital transformation story.



*“For you to listen so patiently and carefully and ask the clarifying questions you do so we can get to a place where you can go build the right solutions, you’ve been a joy. I’m so thrilled we get to continue to work together!”*





# Who is Keep America Beautiful?

Established in 1953, Keep America Beautiful is the nation's leading community improvement nonprofit. Keep America works to inspire and educate people to take action every day to improve and beautify their community environment.

Because much of their work inherently needs to take place at the ground level, they need to be agents of change - educating people at a national level and connecting with local communities around the nation.

At a national level, you may have heard of the Great American Cleanup, which takes place in 20,000 communities nationwide every year. But what you may not have heard of is the knowledge and support they provide to affiliate organizations across the country.





# How does Keep America Beautiful support affiliates?

Keep America Beautiful is the national level umbrella organization, but who are the affiliates? There are 700 affiliates nationwide, ranging from small communities to state-level organizations. Each has their own community of volunteers and donors, as well as varying needs and interests. For example, an organization in the Southwest may be more interested in water conservation, while a coastal community organization may be more interested in beach cleanup.

Affiliates connect with Keep America Beautiful to receive grant funding for research-based initiatives, to access training materials and other best practices for volunteer and program management. They receive training as new affiliates, and provide data for impact reports.





Keep America Beautiful has been operational for over 70 years, and has been using a hub-and-spoke model that was starting to show some wear and tear. When affiliates would reach out for updates on dues and grants, as well as a myriad of programmatic information requests and questions. This led to siloed knowledge, where affiliates with similar programs and questions weren't necessarily connected with one another, and the information had to be held by or funneled through Keep America Beautiful's staff.

Affiliates were also relying on staff to get updates about grant applications and dues, all via phone or email, which became difficult to manage and impossible to measure.

Keep America Beautiful also had fragmented outreach in the sense that they were connecting with affiliates via email, forums, and social media, all hosted on different platforms with fragmented or incomplete data about each and no single view about what affiliates were doing or what kind of materials and outreach were really resonating for them.

Keep America Beautiful knew that they needed a new solution to encourage interconnectivity and empower affiliates, while providing Keep America Beautiful themselves a means to expand and grow their impact without hiring more people to take phone calls.



# Engaging Keep America Beautiful affiliates in a new way

Then came 2020 and the global pandemic. With in-person events postponed or canceled and the world changing around them, Keep America Beautiful knew that they had to jump into action. The pandemic didn't change what they knew they needed to do, but it accelerated the timeline.

Constituents had come to expect rich and meaningful digital experiences similar to the user-friendly online tools that they had become accustomed to in the private sector.

Keep America Beautiful knew that they needed a way to engage a new generation of folks who want to be able to access materials and update data online, on their own time.





# A new era, a new organizational model

Keep America Beautiful partnered with Idealist Consulting to implement Experience Cloud and help transform their model into something a little more like a spider's web. Our approach included four main components:

- 1) Chatter Groups
- 2) Self-Service Portal
- 3) Knowledge Library
- 4) Data Centralization & Salesforce Optimization



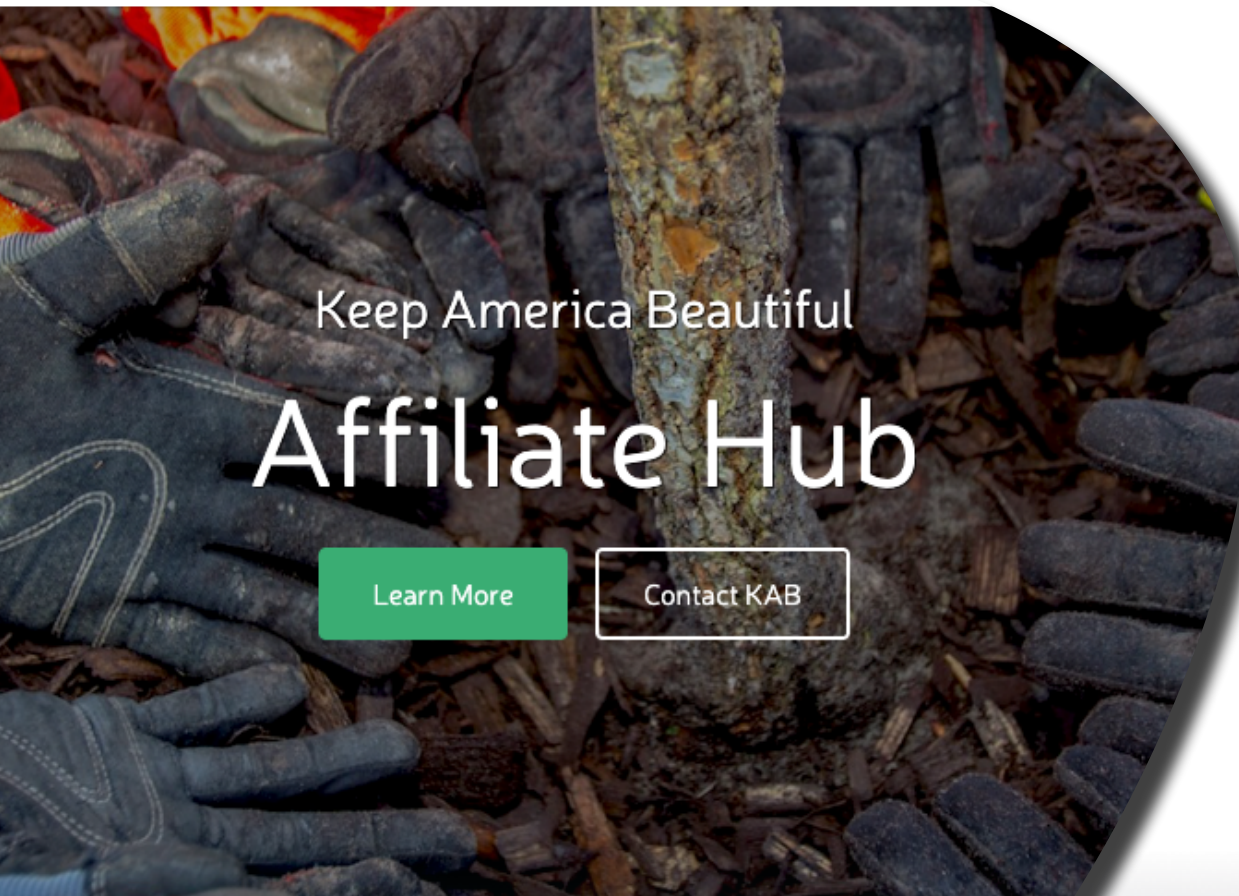
- 1) Together we implemented **Chatter Groups** that eliminated silos and elevated affiliate voices to encourage interconnectivity. That meant that affiliates looking to establish a community garden with plants that would thrive in their area, could now connect with others who had done just that.
- 2) We also established a **Self-Service Portal** to empower affiliates to submit grant applications, pay dues, and update their profiles, reducing reliance on Keep America Beautiful staff and increasing transparency and accessibility.
- 3) We created a **Knowledge Library** to provide affiliates with a myriad of searchable materials, again reducing reliance on KAB staff and providing them with measurable engagement in an easily updatable forum for continual improvement. They're now able to measure engagement and clean out their archives using data.
- 4) Lastly, we established **Data Centralization & Salesforce Optimization**. This gave Keep America Beautiful a 360 view of affiliate engagement and impact with simplified reporting on a single, centralized system.

# The Result





My Affiliate ▾ My Training Articles Groups



## Keep America Beautiful Affiliate Hub

[Learn More](#)

[Contact KAB](#)

My Activities

My G

This is the opening page of Keep America Beautiful's Affiliate Hub, you can see that affiliates have access to their affiliate information, activities, grants, and dues. They also have access to articles at the top of the page, and Groups via Chatter.

They're able to pay their dues and update their profiles, access articles and training materials with the Knowledge Library, and submit help tickets when the answer isn't available in the Knowledge Library or Chatter. This provides a really clear process for addressing questions, and it also allows KAB to view and monitor how many tickets their receiving about a given subject, helping to structure the way high-volume questions are answered.





# Iterate for Success

Instead of revitalizing their engagement every few years, organizations like Keep America Beautiful can continue to gain insight and measure impact to make iterative improvements to their engagement strategy and make sure that they're continually growing and providing value to their communities.

If you're curious if there's an Experience Cloud use case to fit your organization's needs (like housing training materials or managing volunteers), please give us a call, we'd love to talk it through.

*"You do not rise to the level of your goals. You fall to the level of your systems."* - James Clear, Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones





# Additional Resources

- [3 Reasons Experience Cloud Is Worth the Investment](#)
- [How the American Academy of Arts and Sciences Built a Custom Online Community for Its Members](#)  
[What to expect with a Salesforce project](#)
- [Your Top 5 Experience Cloud Questions, Answered](#)
- [Building an Online Community with Heroku or Salesforce Experience Cloud](#)
- [Contact Us](#)

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