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Rikolto is looking to hire a consultant to develop core models for its user, contact and opportunity management in Salesforce

Rikolto

Rikolto (formerly VECO/Vredeseilanden) is an international network organisation with more than 40 years’ experience in partnering with farmer organisations and food chain stakeholders across Africa, Asia, Europe and Latin America.

Rikolto has a global team of 155 employees, based in 7 offices across the world. Legally, Rikolto is a Belgian Public Interest Foundation managed by an International Management Team, composed of the directors of its 7 offices, and an International Board of Directors. This network is supported by a global support team that offers shared services such as finance, monitoring & evaluation, people & organisation, communication and fundraising, to increase global impact and improve the way of working. Rikolto also has set up international project teams, “clusters”, to work on common goals and share expertise, and peer teams in which all peers across the organisation learn and collaborate together (e.g. a communication-fundraising team, a finance team, ...).

The question that guides Rikolto’s work, is: What will we eat tomorrow? How can we guarantee that future generations have access to affordable quality food, knowing that climate change, low prices and poverty are forcing more and more farmers from the land? Rikolto firmly believes that small-scale farmers, who produce 70% of our food worldwide, are a big part of the solution. However, if we do not appropriately include them in food markets and, in doing so, improve their social and economic position, it will be impossible to achieve global change.

In its projects, Rikolto works with 102 farmer organisations, reaching almost 102,000 farming families across 15 countries, but at the same time with food industry, governments, research institutions, banks... to change together the recipe of our food system.

While we try to find very concrete solutions “in the field”, we strive to translate those experiences in policies that bring systemic changes. To this end, we are actively involved in a wide range of international networks, such as the Aspen Network for Development Entrepreneurs (ANDE), the AMEA platform for professionalisation of farmer organisations, the Sustainable Food Lab, UNEP’s 10-year framework on Sustainable Consumption and Production Patterns (One Planet Network), and commodity networks including the Sustainable Rice Platform and the Cocoa Sustainability Partnership.
Context of the assignment

Rikolto has been using Salesforce for two main purposes: as a Customer Relations Management tool (only in Belgium), and as a database that keeps track of its world-wide projects through progress data (on number of partners and beneficiaries, staff, indicators…) and of its implementing and strategic partners (for example farmer organisations, networks, donors…).

Today Rikolto wants to **optimise and further internationalise the use** of our Salesforce database. We want to have more targeted communication to our ‘customers’ (donors, partners, experts, project managers, … involved in fundraising campaigns and projects’ life-cycles). Also, to maximise the customers’ engagement to our organisation (support, funds) we will need to showcase our performance better, based on the project data available.

For this purpose, in 2018 we have started an **organisational project with the following deliverables**:  

- Rikolto optimally uses Salesforce’s potential for *customer management and communication*, in Belgium and in the 7 regions where we work;
- Rikolto can translate the project data directly to transparent, regular and accurate communication, making use of Salesforce;
- Rikolto’s international procedures for using Salesforce take into account all relevant juridical and security issues (i.e. specifically the GDPR).

Rikolto has recently **finalised the first phase of this project**. An expert study was done that identified areas for improvement within the current Salesforce implementation and defined a ‘to be’ model, meaning:  

- the basic working principles which will underpin and guide the new way of working;
- the overarching data model and requirements;
- the ‘to be’ process flow(s) and requirements;
- a roadmap and project plan for the Salesforce optimisation process.

Expected deliverables of the assignment

We are looking for a consultant to operationalise the proposed usage recommendations of the preliminary study, i.e. to work with Rikolto on **the architectural design of core models for 3 sub-processes** within Salesforce (and environment).

These sub-processes are:

1. **User management**: design a Salesforce user management protocol for Rikolto staff, that ensures both GDPR-compliance and at the same time allows for a 360° overview of Rikolto’s global relationships.
2. **Contact management**: convert Rikolto’s privacy statement (GDPR) to a set of policies and workflows in Salesforce, including links with external applications used for contact communication (e.g. Outlook, Mailchimp). Concretely we expect that:

- (semi) automated workflows are designed and built for (1) contact creation and synchronisation with external applications, (2) consent management, and (3) subscription management (opt in and opt out)
- a workflow to visualise/indicate the relationship with contacts (=customer journey) is designed and built, for better customer management and communication
- clear technical instructions are given on the contact layout in Salesforce to make it GDPR compliant and in line with the newly developed workflows
- a detailed user manual is developed for above mentioned workflows

3. **Opportunity management**: currently Rikolto is using the opportunities section in Salesforce for 2 different procedures: 1) to manage private individual donations, and 2) to report on the flow of donor funds, in line with the International Aid Transparency Initiative (IATI). Now, Rikolto is envisioning to also manage institutional fundraising opportunities within Salesforce (i.e. funds from public authorities, (private) foundations, multinational institutions, corporates...). Concretely we expect:

- workflows are designed and built for visualising and monitoring Rikolto’s end-to-end fundraising flow (so including pre-donation history) in Salesforce opportunities, both for private individual donors and for institutional donors
- internal collaboration protocols are designed to work simultaneously on those opportunities (this means internationally for the institutional donors)
- for both of above workflows and protocols clear technical instructions are given on how to implement them
- clear technical instructions are given on how to transit from lead to opportunity, and from opportunity to donor/contact, reflecting Rikolto’s end-to-end fundraising flow
- a detailed user manual is developed for above mentioned workflows

**Required profile**

We are looking for a Salesforce-expert with expertise in CRM processes. The consultant should preferably have experience in an international and non-profit context, and in the practical implementation of GDPR regulations in such a context.

We expect the consultant to have the capacity to think strategically and holistically on Rikolto’s international processes. Rikolto’s processes are blended and interconnected over departments, offices and regions, and should be considered end-to-end.
Selection process

Candidates are requested to submit their proposals to nina.pattyn@rikolto.org by 27th of May 2019, detailing:

- Relevant experience in relation to the assignment
- Overview of proposed approach
- Daily fee rate and estimate of working days

We expect to identify the selected candidate and have a kick-off meeting in the 1st half of June 2019.

Further information can be obtained from nina.pattyn@rikolto.org