

# NPSP: Create and Manage Engagement Plans

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## Overview

An Engagement Plan is a set of tasks (literally a “plan”) that helps you engage with your constituents. The most common example of an Engagement Plan is a plan that helps you track engagement activities for Major Gifts. Major donors (that is donors who are giving extremely large amounts of money to your organization) typically require a deeper level of engagement than your average donor. For example, an Engagement Plan with a major donor might include calling that donor to schedule a lunch, then having the lunch with the donor, then sending a follow-up email to the donor, and so on. You'd set up each of these activities as a task on the Engagement Plan, to be completed by a scheduled date.

Engagement plans can be kicked-off manually by a development officer or automatically when used in conjunction with Levels. If used with Levels, the Engagement Plan starts when a donor reaches a certain Level, such as Platinum Donor. For more information, see [Create and Manage Levels \(/articles/Resource/NPSP-Create-and-Manage-Levels\)](/articles/Resource/NPSP-Create-and-Manage-Levels).

There are many other use cases for Engagement Plans, including volunteer management, grant-making, client management, and sponsor management. This documentation will showcase a real-world scenario for Major Gifts, but the instructions are applicable for any use case.

# Setup—Before You Begin

Before you can get started with Engagement Plans, make sure it's enabled in your org and ready to work with. If you started using NPSP at version 3.81 (<https://github.com/SalesforceFoundation/Cumulus/releases/tag/rel%2F3.81>) (September 2016) or later, you can skip this section. If you don't know which version of NPSP you're using, check out [Which Version of Nonprofit Success Pack Am I Using?](/articles/Resource/Which-Version-of-NPSP-Am-I-Using) (/articles/Resource/Which-Version-of-NPSP-Am-I-Using) to find out.

To set up Engagement Plans:

1. Enable New Objects
2. Enable Engagement Plan Fields for Tasks
3. (Optional) Enable Engagement Plans for Custom Objects
4. (Optional) Add the Engagement Plans Tab
5. Add Engagement Plans to Page Layouts

## Enable New Objects

The following objects are new to NPSP.

- Engagement Plans
- Engagement Plan Tasks
- Engagement Plan Templates

Go to **Setup | Profiles** and edit the profiles for all users who will work with Engagement Plans to include the following permissions and settings. Remember to do this for each of the objects listed above.

- Tab Settings set to **Default On**.
- Object permissions set to **Read**, **Create**, **Edit**, and **Delete**.
- For the System Administrator profile, Object Permissions set to **Modify All** and **View All**.
- In the Field Level Security section, the **Read Access** and **Edit Access** boxes are checked for each new field.

If you're not sure how to update the permissions and fields for these objects, see [Enable New Features](/articles/Resource/NPSP-Enable-New-Features) (/articles/Resource/NPSP-Enable-New-Features).

## Enable Engagement Plan Fields for Tasks

There are two new Engagement Plan fields on Tasks: **Engagement Plan** and **Engagement Plan Task**. You need to set field level security for these fields and add them to the Task page layout. You also need to make sure the **Type** field is visible.

1. Go to **Setup | Profiles** and edit the profiles for all users who will work with Engagement Plans. In the Field Level Security section, view the Task fields and make sure the **Read Access** and **Edit Access** boxes are checked for the Engagement Plan, Engagement Plan Task, and Type fields.
2. Then, go to Setup, enter `page layouts` in the Quick Find box, then click **Task Page Layouts** under the Activities menu. Add the Engagement Plan and Engagement Plan Task fields to the page layout.

## (Optional) Enable Engagement Plans for Custom Objects

By default, you can associate Engagement Plans with Contact, Account, Opportunity, Campaign, and Recurring Donation records. But, you can add an Engagement Plan to any object. Simply add a Lookup field to the Engagement Plan object.

1. To add a new field, go to **Setup**, enter `Objects` in the Quick Find box, and select **Objects** under the Create menu.
2. Click Engagement Plan (not the Edit link). Then click New in the Custom Fields related list.
3. Select the Lookup Relationship radio button and click **Next**.
4. Choose the object you want to associate Engagement Plans with and click **Next**.
5. Fill in the required fields and click **Save** when you're done.

For detailed information on adding fields, see [Create Custom Fields](https://help.salesforce.com/apex/HTViewHelpDoc?id=custom_field_types.htm) ([https://help.salesforce.com/apex/HTViewHelpDoc?id=custom\\_field\\_types.htm](https://help.salesforce.com/apex/HTViewHelpDoc?id=custom_field_types.htm)).

**NOTE:** If you're associating an Engagement Plan with a custom object, the object must have the option to **Allow Activities** checked or you will get an error.

### Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups

#### Custom Object Definition Detail

Edit Delete

		Description
Singular Label	Custom Object	
Plural Label	Custom Objects	Enable Reports ✓
Object Name	Custom_Object	Track Activities ✓
API Name	Custom_Object__c	Allow in Chatter Groups ✓
		Allow Sharing ✓
		Allow Bulk API Access ✓
		Allow Streaming API Access ✓
		Track Field History ✓

## (Optional) Add the Engagement Plans Tab to an App

We suggest adding the Engagement Plan Templates tab to an App that is accessible by users who will be setting up Engagement Plans. This ensures that users can easily find the tab. For example, you could add the tab to the NPSP App. For more information on tab settings, see [View and Edit Tab Settings in Permission Sets or Profiles \(https://help.salesforce.com/apex/HTViewHelpDoc?id=users\\_tab\\_visibility.htm\)](https://help.salesforce.com/apex/HTViewHelpDoc?id=users_tab_visibility.htm).

**Custom App Edit** [Save] [Save & New] [Cancel]

App Label: Nonprofit Starter Pack

App Name: Nonprofit\_CRM [i]

Namespace Prefix: npsp

Installed Package: Nonprofit Starter Pack

Description: The Nonprofit Starter Pack application

Choose the Image Source for the Custom App Logo

[Insert an Image] [Reset to Default]

Choose the Tabs

**Available Tabs**

- Price Books
- Cases
- Contracts
- Dashboards
- Documents
- Forecasts
- Orders
- Products
- Solutions
- Console
- Libraries
- Content
- Subscriptions
- Ideas

[Add] [Remove]

**Selected Tabs**

- Home
- Accounts
- Contacts
- Leads
- Opportunities
- Campaigns
- Reports
- Recurring Donations
- Engagement Plan Templates
- Levels
- Contact Merge
- NPSP Settings
- Getting Started

[Up] [Down]

## Add Engagement Plans to Page Layouts

On Contacts, Accounts and/or any other object associated with Engagement Plans, update the relevant page layouts ([https://help.salesforce.com/apex/HTViewHelpDoc?id=customize\\_layout.htm](https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_layout.htm)) to include the Engagement Plans related list. We also recommend that you add that the following fields as columns in the related list:

- Engagement Plan Number
- Engagement Plan Template
- Status
- Total EP Tasks
- Completed Tasks
- Created Date

The **New** button should be enabled by default, but it doesn't hurt to double check.

# Plan Ahead

Engagement Plans work best when the organization has a well-defined process with buy-in from individuals that will participate in the execution of the plan. Depending on the plan, this could be an extensive series of actions involving individuals from across the organization.

We recommend creating a plan that answers the following questions before you start creating Engagement Plans.

- What is the result being sought?
- What is the series of actions that will produce the result?

Once you have a plan with a defined set of tasks and the team involved has given the thumbs up, you're ready to get started. But before you do, we wanted to give you an idea of what a plan might look like. We'll use a Major Donor Stewardship Plan as an example.

- **Desired Result:** Donor renews gift the following year at the same level.
- **Series of Actions:**
  1. Acknowledgements:
    - Day 1: Send Personal Email Acknowledgement
    - 7 days later: Phone Call Acknowledgement from Development Director
  2. Day 1: Add Donor to Honor Wall
  3. Day 10: Handwritten Acknowledgement from the Executive Director
  4. Day 60: Invitation from the Program manager to learn more or see the program in action
  5. Day 180: Meeting Invitation extended from the Executive Director
  6. Day 270: Development Director begins solicitation
  7. Day 300: E.D. and Dev. Director make an Ask

There might be further interactions happening outside this plan, such as invitations to exclusive events and spontaneous conversations, but we wanted to illustrate a thoughtful process that was determined to create the best chance of keeping that donor engaged year-to-year.

## Create an Engagement Plan Template

The Engagement Plan Template simply defines the set of tasks for the process. To apply the process to a particular record, you must assign the Engagement Plan template to the record.

1. Click the **Engagement Plan Templates** tab. If you don't see the tab, see Add the Engagement Plans Tab.
2. Click **New** to create a new Engagement Plan Template.

3. Give the Template a meaningful name, such as Major Gift Follow Up.
4. You can configure additional options as shown:

The screenshot shows the 'Engagement Plan Template Edit' window. At the top, there's a title bar with 'Engagement Plan Template Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. Below the title bar is the 'Information' section. It contains the following fields and options:

- Engagement Plan Template Name:** A text field containing 'Major Gift Follow Up'.
- Automatically Update Child Task Due Date:** A checkbox that is checked.
- Default Assignee:** A dropdown menu showing 'User Creating Engagement Plan'.
- Skip Weekends:** A checkbox that is checked.
- Reschedule To:** A dropdown menu showing 'Monday'.
- Description:** A text area.

Four red circles with numbers 1 through 4 are overlaid on the form, with arrows pointing to specific fields: 1 points to 'Automatically Update Child Task Due Date', 2 points to 'Default Assignee', 3 points to 'Reschedule To', and 4 points to 'Description'. At the bottom of the form, there are buttons for 'Save', 'Save & New', and 'Cancel'.

**Automatically Update Child Task Due Date (1)**—If checked, dependent tasks will start based on their parent task completion. In our example, we want this checked because we don't want the follow-up call (dependent task) to happen until after the email (parent task) has been sent. If the major gift officer is delayed in sending the email, the follow up call will happen 7 days later (not 7 days after the task is created).

**Default Assignee (2)**—If a Task doesn't have a named Assignee, this determines who will be assigned the Task by default (Salesforce Tasks must be assigned to a user). You can select either the User Creating Engagement Plan or the Owner of the Record that the Engagement Plan is associated with.

**Skip Weekends (3)**—If checked, due dates are automatically adjusted for weekends. For example, a Task completed on a Friday has a follow up Task two days later. Instead of having a due date on a Sunday, that Task would be due the following Tuesday.

**Reschedule To (3)**—This is used only in conjunction with Skip Weekends. This would be typically be set to Monday, but if your organization is closed on Mondays, you could select Tuesday.

**Description (4)**—A meaningful description of the Template's use case.

5. Click **Save**.

## Add Tasks to an Engagement Plan Template

With your Template defined, it's time to set up the individual Tasks associated with this process. You can add standalone Tasks or dependent Tasks.

1. On the Engagement Plan Template record, click **Manage Template**.
2. Click **Add Task**.
3. Add the details for your first Task. In doing so, you are defining the field values for Tasks that will be scheduled when an Engagement Plan is deployed by your users. Some important details to remember:
  - **Days After**—For Task 1 in the process and other tasks that are not dependent, this field value pushes the due date out from the day of creation. For dependent tasks, it pushes the due date out from the due date on the parent task. For both types of tasks, the Days After setting respects the Skip Weekends setting (as described above).
  - **Send Email**—Enables the standard task notification email that is sent the moment the task is created.
  - **Reminder**—Enables the standard task reminder setting, which shows a pop-up reminder to the assigned user on the due date of the task

Task 1

Subject	Assigned To	Type	Priority
Send personal email thank you		Email	Normal
Status	Send Email <input type="checkbox"/> Reminder <input checked="" type="checkbox"/>	Reminder Time	Days After
Not Started		8:00 AM	
Comments			
<div>Add Dependent Task Delete Task</div>			

4. Add additional Tasks or dependent Tasks for your plan.

Task 1

Subject	Assigned To	Type	Priority
Send personal email thank you		Email	Normal
Status	Send Email <input type="checkbox"/> Reminder <input checked="" type="checkbox"/>	Reminder Time	Days After
Not Started		8:00 AM	
Comments			
<div>Add Dependent Task Delete Task</div>			

Task 1-1

Subject	Assigned To	Type	Priority
Call Donor		Call	Normal
Status	Send Email <input type="checkbox"/> Reminder <input checked="" type="checkbox"/>	Reminder Time	Days After
Not Started		8:00 AM	7
Comments			
<div>Add Dependent Task Delete Task</div>			

Task 2

Subject	Assigned To	Type	Priority
Add Donor to Honor Wall		Other	Normal
Status	Send Email <input type="checkbox"/> Reminder <input type="checkbox"/>	Reminder Time	Days After
Not Started		12:00 AM	
Comments			
<div>Add Dependent Task Delete Task</div>			

5. When you're done adding Tasks, click **Save** (at the top of the screen).

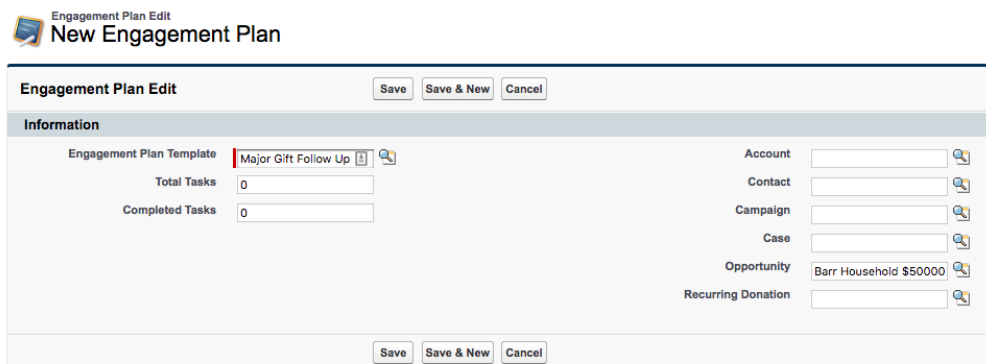
# Edit Tasks on an Engagement Plan Template

If you need to make any adjustments to the Engagement Plan Template, simply visit the Template record and click **Manage Template**.

**❗ IMPORTANT:** *Changes to the Template are not reflected in Engagement Plans created from the Template that are already assigned to records.*

## Assign an Engagement Plan to a Record

1. Navigate to the record where you'd like to create an Engagement Plan. For our example, it's a \$50,000 donation that came in that should follow the Major Donor plan.
2. Click **New Engagement Plan** on the Engagement Plan related list.
3. The associated record (for our example, the Opportunity) should automatically be populated.
4. Give the Plan a meaningful name.



The screenshot shows the 'New Engagement Plan' form in Salesforce. At the top, there's a header 'Engagement Plan Edit' with a 'New Engagement Plan' icon and title. Below this is a sub-header 'Engagement Plan Edit' with 'Save', 'Save & New', and 'Cancel' buttons. The form is divided into two main sections: 'Information' and 'Related Records'. The 'Information' section contains fields for 'Engagement Plan Template' (set to 'Major Gift Follow Up'), 'Total Tasks' (0), and 'Completed Tasks' (0). The 'Related Records' section contains fields for 'Account', 'Contact', 'Campaign', 'Case', 'Opportunity' (set to 'Barr Household \$50000'), and 'Recurring Donation'. Each field has a magnifying glass icon for search. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

**NOTE:** *You can only associate an Engagement Plan to a single record. If you try to connect an Engagement Plan to multiple records at the same time, such as Opportunity and Contact, you'll get an error message.*

5. Click **Save**. Notice the Tasks from the Template now appear on the Engagement Plan record with the appropriate due dates and assignments. All of which are attached to the associated Opportunity record, so that your team can begin the stewardship plan.



**Engagement Plan Detail** [Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#)

Engagement Plan Template	Major Gift Follow Up	Account
Engagement Plan Number	EP-0001	Contact
Status	Not Started	Campaign
Total Tasks	3	Case
Total EP Tasks	3	Opportunity
Completed Tasks	0	Recurring Donation
Created By	Judi Sohn, 9/9/2016 6:45 AM	Last Modified By
		Judi Sohn, 9/9/2016 6:45 AM

[Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#)

**Tasks** [New Task](#) [New Event](#) [Tasks Help](#) ?

Action	Subject	Name	Related To	Task	Due Date	Status	Closed	Priority	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	Call Donor		Barr Household \$50000 Donation 09/09/2016	✓	9/16/2016	Waiting on Dependent Task	<input type="checkbox"/>	Normal	Judi Sohn	9/9/2016 6:45 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Add Donor to Honor Wall		Barr Household \$50000 Donation 09/09/2016	✓	9/9/2016	Not Started	<input type="checkbox"/>	Normal	Judi Sohn	9/9/2016 6:45 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Send personal email thank you		Barr Household \$50000 Donation 09/09/2016	✓	9/9/2016	Not Started	<input type="checkbox"/>	Normal	Judi Sohn	9/9/2016 6:45 AM

You also see the Engagement Plan listed on the associated record's Engagement Plan related list.

**Engagement Plans** [New Engagement Plan](#) [Engagement Plans Help](#) ?

Action	Engagement Plan Number	Status	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	EP-0001	Not Started	9/9/2016

**Open Activities** [New Task](#) [New Event](#) [Open Activities Help](#) ?

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
<a href="#">Edit</a>   <a href="#">Cls</a>	Send personal email thank you		✓	9/9/2016	Not Started	Normal	Judi Sohn
<a href="#">Edit</a>   <a href="#">Cls</a>	Add Donor to Honor Wall		✓	9/9/2016	Not Started	Normal	Judi Sohn
<a href="#">Edit</a>   <a href="#">Cls</a>	Call Donor		✓	9/16/2016	Waiting on Dependent Task	Normal	Judi Sohn

## Execute the Engagement Plan

With the tasks assigned, your team is ready to execute the carefully crafted process this Engagement Plan supports. Tasks will show up on your team members' Home Page task lists and in reports. As they complete tasks, users should update the Task to a status of Completed. To learn more about how Activity and Task records work in Salesforce, see Activities (<https://help.salesforce.com/apex/HTViewHelpDoc?id=activities.htm>).

**Dependent Tasks:** When you complete a Task with a dependent Task, the dependent Task's status is automatically updated from **Waiting on Dependent Task** to **Not Started**.

**Engagement Plan:** As soon as you complete a single Task, the Status on the Engagement Plan updates from **Not Started** to **In Progress**. When the last Task is completed, the Status on the Engagement Plan is updated to **Complete**.

\*\*\*\*Special thanks to Melissa Barber, who also contributed to this documentation.\*\*\*\*



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