Claude for Nonprofits

fusionSpan

Claude that does the work across your systems, not just reports on them.

STAFF ASKS CLAUDE

Enroll the Garcia family in the summer meals program, log today's visit, and set a follow-up with their case manager.

CLAUDE DOES IT ACROSS YOUR SYSTEMS

- ✓ Program enrollment created — Programs
- ✓ Visit logged to the case — Cases
- ✓ Follow-up on the calendar — Outlook
- ✓ Case manager notified — Teams

Confirmed by staff before posting

YOUR CORE PLATFORM

- Nonprofit Cloud
  - Programs and Cases
  - Fundraising
  - Grants
  - Volunteers
- Salesforce

Claude

Reads, decides, and acts

WHERE YOUR STAFF WORK

- **Microsoft 365** — Outlook · Teams · SharePoint
- **Google Workspace** — Gmail · Drive · Calendar
- **Slack** — Channels and messages

YOUR OTHER SYSTEMS

- Payments
- Online giving
- Email marketing
- Accounting
- Events
- Forms and surveys
- Grant portals
- Volunteer scheduling
- Data warehouse

Connected through Claude connectors, custom MCP servers, and fusionConnect, our integration platform

Quickstart

2 WKS Connected to your systems, first actions live.

- Salesforce + 2 tools
- 3 actions live
- Staff training

Service Actions

3–4 WKS Client, donor, and volunteer requests.

- Enroll clients
- Log services
- Record gifts
- Schedule volunteers

Insight to Action

2–3 WKS Spot the trend and act on it.

- Program outcomes
- Lapsed donors
- Follow-up tasks

Workflow Agents

3–4 WKS Runs across systems, no prompt needed.

- Client intake
- Grant reports
- Gift processing
- Volunteer onboarding

Action Guardrails

1–2 WKS Decide what Claude can do, and for whom.

- Role permissions
- Approval thresholds
- Usage policy

BUILT INTO EVERY ACTION

- **Your permissions** — Only what the user can do
- **Confirm first** — Nothing posts without a yes
- **Full audit trail** — Every change logged

Claude Certified Services Partner

fusionSpan is Certified in the Claude Partner Network.

www.fusionSpan.com info@fusionSpan.com +1 888-851-7995