

TITAN for Nonprofit Teams

Run Constituent Intake, Grant, and Approval Workflows Inside Salesforce

Titan executes these workflows directly in your CRM, delivering governed visibility, stronger oversight, and faster program delivery.

Nonprofit Pain Points

- ⊗ Intake forms arrive incomplete or without required documentation
- ⊗ Grant applications are reviewed across email and shared drives
- ⊗ Agreements and consent forms sit outside Salesforce, increasing governance risk
- ⊗ Limited visibility into application reviews and funding decisions for small teams
- ⊗ Audit traceability is spread across systems



Result: Slower program execution, operational strain, and governance risk

How Titan Works Inside Salesforce

Automated Constituent Intake

Constituents complete secure intake forms through branded, Salesforce-connected experiences. Required fields, eligibility data, and uploads are enforced with conditional logic. Submissions write directly to the correct Salesforce record with real-time visibility for program teams.

Grant & Program Workflow Execution

Applications and supporting documentation move through structured review and approval workflows. Routing, status tracking, and notifications remain tied to the Salesforce record. Every step stays visible across teams in real time.



Agreement & Document Management

Grant agreements, consent forms, and supporting documents are generated from Salesforce data. Files are routed for approval, sent for eSignature, and stored automatically on the correct record. Real-time updates keep stakeholders aligned at every stage.



Without Titan

- External intake forms
- Manual grant reviews
- Documents managed outside Salesforce
- Email-based status updates
- Fragmented tracking and audit gaps



With Titan

- Intake validated in Salesforce
- Grant workflows executed in Salesforce
- Documents generated and signed in Salesforce
- Real-time status visibility
- End-to-end governed traceability

Outcomes for Nonprofit Organizations

✓ Faster Program Delivery

Constituents move through intake and approvals without unnecessary delays.

✓ Fewer Incomplete Submissions

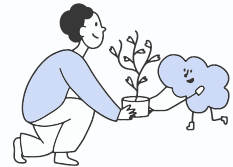
Required information is captured correctly the first time.

✓ Capacity to Scale Programs

Teams manage higher application volumes and expanding programs without adding staff.

✓ Clear Program Accountability

Documents, approvals, and decisions remain tied to Salesforce records for reporting and oversight.



The Bottom Line

Titan delivers the governed workflows that run programs at scale.

Nonprofit operations require control, visibility, and traceability. Salesforce remains your system of record. Titan provides the execution layer that keeps intake, grant, and approval workflows connected and fully governed within it.

