








Box Use Cases for Nonprofits

USE CASE CATEGORY

| | Description | Features | Development/ Fundraising | Communications/ Marketing | Program Management | IT | Legal | HR | Finance | Executive/Board |
|--|--|---|--|---|---|---|--|--|---|---|
|  <p>Basic Sync & Share</p> | Use Box for content storage and sharing (replacing a personal/corporate drive), accessible on any device | <ul style="list-style-type: none"> Mac & Windows Sync 15GB Upload Size Preview Full Document Search Groups | <ul style="list-style-type: none"> Centralized Donor Content Repository Donor Asset Distribution Gift Contract Template Repository | <ul style="list-style-type: none"> Centralized Content Repository Comms Asset Distribution | <ul style="list-style-type: none"> Store and Share Program Information | <ul style="list-style-type: none"> Org User Drive PC Backup | <ul style="list-style-type: none"> Store and Share Contracts | <ul style="list-style-type: none"> Centralized Employee Record Repository Distribute Onboarding Materials | <ul style="list-style-type: none"> Store and Share Financial Documents | <ul style="list-style-type: none"> Access Meeting Notes, Financial and Company Information |
|  <p>Mobile Productivity</p> | Use Box to access corporate content from a mobile device | <ul style="list-style-type: none"> Native Apps on all Platforms Mobile Preview Device Pinning Mobile Security Controls Box for EMM | <ul style="list-style-type: none"> Onsite and Field Based Development and Partnership Activities | <ul style="list-style-type: none"> Virtual Binder for Events Comms Asset (Photo, Video) Collection from the Field | <ul style="list-style-type: none"> Field Program Content Access Mobile Access to Program Content Assets | <ul style="list-style-type: none"> Enterprise Mobility Management BYOD and Remote Work Solution | <ul style="list-style-type: none"> Mobile Access to Legal Documents Mobile Redlining and Annotations of Legal Documents | <ul style="list-style-type: none"> Approve Offer Letters from Mobile Devices | <ul style="list-style-type: none"> View and Approve Financial Statements from Mobile Devices | <ul style="list-style-type: none"> Virtual Board Packets Mobile Access to Confidential and Sensitive Information |
|  <p>Team Collaboration & Project Management</p> | Use Box to store, share and collaborate on documents and critical projects with team members | <ul style="list-style-type: none"> Box Notes Comments Tasks Annotations Granular Permissions Version History | <ul style="list-style-type: none"> Development Team Training & Onboarding Grant Creation Partnership Design Event Planning and Execution | <ul style="list-style-type: none"> Event Planning & Binders Asset Creation Marketing Campaign Execution | <ul style="list-style-type: none"> Program Design and Development Collaboration on Program Documents Standup Meetings Evaluation & Measurement Teamwork | <ul style="list-style-type: none"> Disaster Recovery Communication Log Secure Internal File Sharing Tool | <ul style="list-style-type: none"> Internal Legal Projects | <ul style="list-style-type: none"> Manage Hiring Process & Feedback Loop | <ul style="list-style-type: none"> Audit Testing Activities | <ul style="list-style-type: none"> Executive Meeting Content Centralized Strategic Planning |
|  <p>Cross-Department Collaboration</p> | Use Box to share documents between different internal teams | <ul style="list-style-type: none"> Granular Permissions Shared Links Access Statistics Box Notes | <ul style="list-style-type: none"> Grant Writing Internal Portal for Development Tools Event Planning, Execution and Follow-up | <ul style="list-style-type: none"> Development Enablement Alignment with Development Program Impact Collaboration and Alignment Budget Planning | <ul style="list-style-type: none"> Coordinate Program Launches & Measurement Collaboration with Comms, Development Teams | <ul style="list-style-type: none"> IT Resource Repository Secure Internal Collaboration Tool | <ul style="list-style-type: none"> Contract & Proposal Creation | <ul style="list-style-type: none"> HR Portal Performance Reviews Headcount Planning Internal Job-Board | <ul style="list-style-type: none"> Contract Management with Internal Teams | <ul style="list-style-type: none"> Collaboration between Executive Team and Board Members |
|  <p>External Collaboration</p> | Use Box to store and manage the transfer of content with external parties | <ul style="list-style-type: none"> Managed External Collaborators Usage Logs Granular Permissions Restricted Downloads | <ul style="list-style-type: none"> Donor/Event Guest Collaboration Partner/Vendor Portal | <ul style="list-style-type: none"> Agency/Vendor Collaboration Event Coordination & Management Collaboration with Design Agencies | <ul style="list-style-type: none"> Collaboration with Partners & Donors Field Asset Procurement Volunteer Content Collaboration | <ul style="list-style-type: none"> External Software Distribution External File Sharing & Collaboration Tool | <ul style="list-style-type: none"> Collaboration with Outside Council Virtual Deal Room | <ul style="list-style-type: none"> Recruiting Event Coordination & Management Collaboration with Recruiting Agencies | <ul style="list-style-type: none"> Financial Compliance Grant Research Collaboration Donor and Partner Relations Collaboration with External Auditors Procurement Activities | <ul style="list-style-type: none"> Mergers & Acquisitions Activities Collaboration Between Executives and Major Donors/Partners |
|  <p>Process Management</p> | Use Box to transfer information between parties to achieve a desired business objective as part of critical business processes | <ul style="list-style-type: none"> Metadata Automations Tasks Governance | <ul style="list-style-type: none"> Gift Contract Management Grant Management Event Management Staff Onboarding | <ul style="list-style-type: none"> Digital Asset Management Staff Onboarding | <ul style="list-style-type: none"> Program Management Content Workflow Program Measurement Volunteer Onboarding | <ul style="list-style-type: none"> IT Asset Content Management with Teams and Vendors | <ul style="list-style-type: none"> Contract Management Contract and Proposal Review Process Sales Contract Management | <ul style="list-style-type: none"> Automated Onboarding Process Offer Letter Review and Approval Process | <ul style="list-style-type: none"> Contract Management Invoice Processing Order Management Automatic Renewal Notifications Budget Prioritization/Request Process | <ul style="list-style-type: none"> Org Performance Review and Management |
|  <p>Platform</p> | Use the Box platform to power content services in custom apps for employees, customers, partners, or suppliers | <ul style="list-style-type: none"> App Users UI Kits Box API | <ul style="list-style-type: none"> Custom portal for donors, partners, vendors and volunteer fundraisers Integrate with donor management systems | <ul style="list-style-type: none"> Create a custom channel portal to distribute marketing assets Embed marketing assets directly on org websites | <ul style="list-style-type: none"> Integrate with program management applications Custom portals for volunteer/ program partner content management | <ul style="list-style-type: none"> Automate internal processes, migrate content from legacy ECM, and maintain centralized control over content stored in any app | <ul style="list-style-type: none"> Liability waivers portals for external stakeholders Create custom applications for distributing contracts or agreements for signature | <ul style="list-style-type: none"> Create a custom recruiter app to gather resumes, candidate paperwork and distribute onboarding materials | <ul style="list-style-type: none"> Build a custom donor or funding partner portal Create custom apps for collecting sales and expense reports, financial information, and contracts | |