



**Nonprofit  
Technology  
Conference**

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# Attention CRM Shoppers!

## Understanding and choosing a Fundraising CRM

**#18NTCcrmshop**

<http://po.st/18NTCcrmshop>

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- Sage70 is a consultancy devoted to making technology work for nonprofits
- 15 years of experience working with Data, CRM, and Tech Strategy
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# Robert Weiner

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- Robert helps fundraisers make informed, strategic decisions about technology and operations.
- Over 30 years of experience.
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Idealware: 10 Things To Consider in a CRM

Will All Your Constituents Fit Into One System? An Idealware Workbook

# What Do CRMs Do?

- Track interactions between your organization and its constituents
- Contextualize those interactions and store them in an organized fashion (donations, event attendance, meetings, etc.)
- Report on all the data collected
- Project and process management

So why is this so F\*#@!g  
Complicated?!

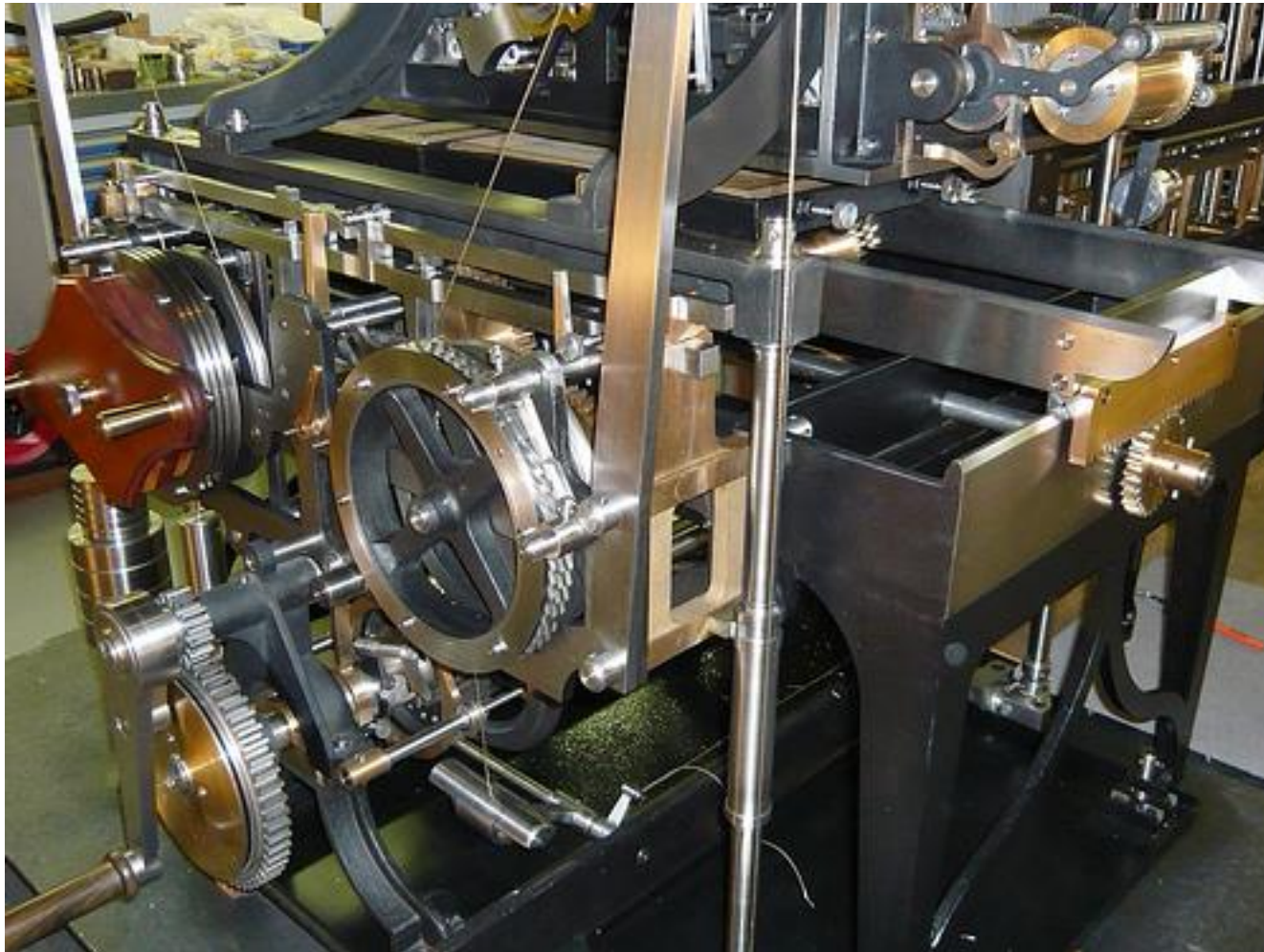


# It's Therapy





# There are lots of moving parts



Babbage Difference Engine - Image: [Marcin Wichary](#)



# What You Want



# What You're Getting



# Debunking CRM Myths

There is no such thing as a CRM that is:

- Intuitive
- User-friendly
- Powerful and easy to learn
- Intended for the layperson
- Free like beer (vs. free like a puppy)

Because managing data is hard, and takes expertise, training, and process.



# What's Hard For You?

- Who's in the room?
- What stage is your CRM exploration at?
- What role do you play in CRM adoption/selection?
- What challenges are you encountering?
- What do you hope to learn about today?

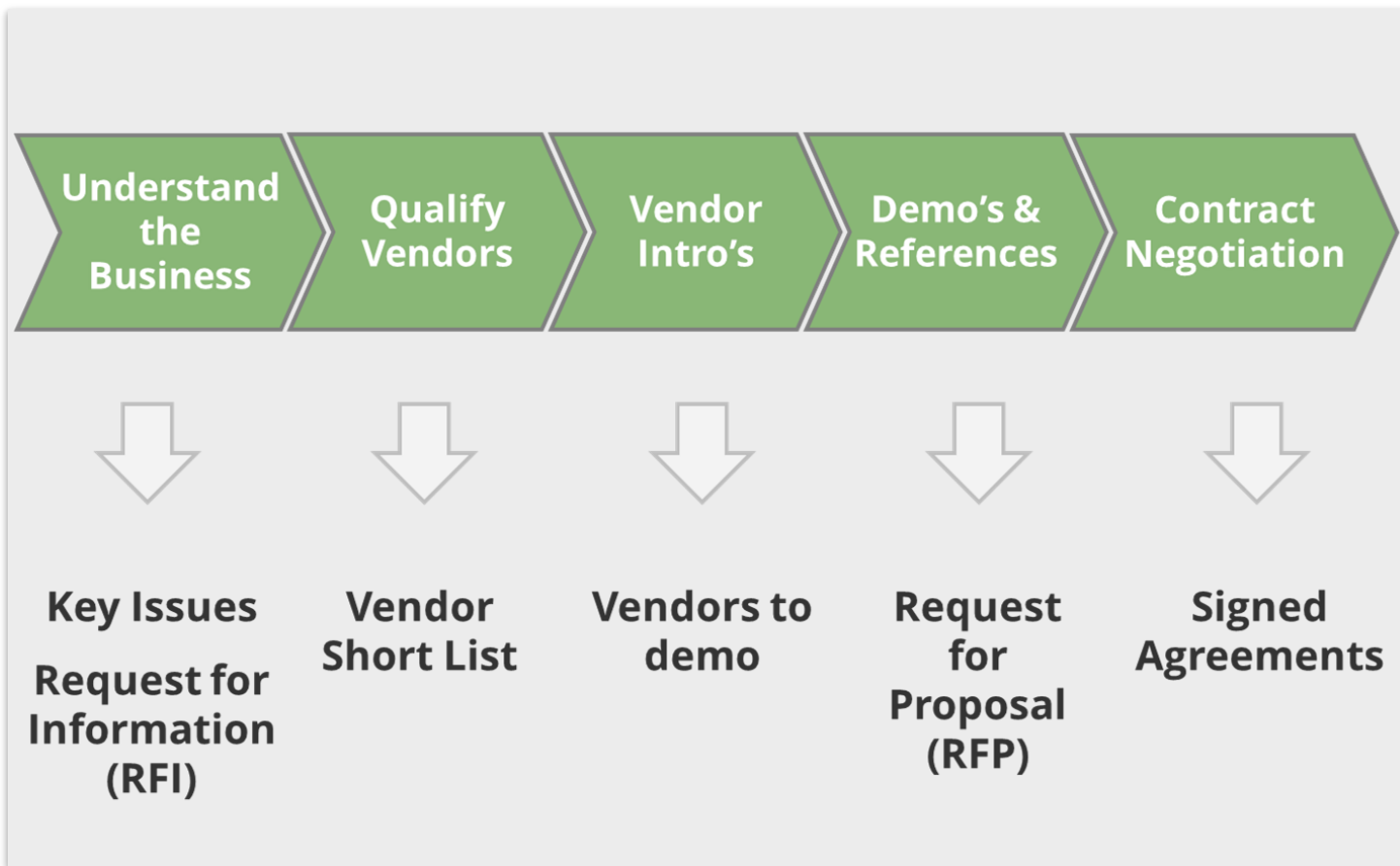
# The CRM Journey



# Readiness Assessment

- Do you need a new CRM?
- Identify gaps:
  - Process
  - Training
  - Staffing
  - Readiness
- Establish realistic timelines and budgets
- Identify project champion and manager

# From Selection to Purchase





# “Red Flag” Phrases



“Our board member told us to get this, he loves it at his office.”



“It’s free!”



“Our volunteer is really smart.  
She’ll figure this out!”



“We need to get this up and running in the next 3 weeks.”

# How to Choose a CRM

An overview of the CRM universe

# It's a Jungle Out There

- There are hundreds of CRMs, including 50+ for the nonprofit market
- CRMs touch many other systems in your organization
- Hosted vs SaaS
- Pricing Models
- Training & Support Models
- Consider hiring a guide!

# Selecting New Tech

- Envision the future
- Determine timing, budget, and staff resources
- Set goals, priorities and determine deal-breakers
- Test

# Time, Budget, & Staff

Less



Requires



More

&/or More



Images by [ToniVC](#),  
[Images of Money](#), [minifig](#)

# Compare Apples to Apples



Image: [Castaway in Scotland](#)

**Vs.**



Image: [Brooks Elliott](#)

# Software Demonstrations

- Sample of a Demo Script:
  - Add a record for Barney Rubble, with a \$25 gift.





# Software Demonstrations

- Add a record for Elizabeth McBricker, with a \$10,000 multi-year pledge through her family foundation. Give Elizabeth soft credit.



# Software Demonstrations

- Barney volunteers at an event. How would we track his hours and what he did for us?



Image: [TEDxHeraklion](#)

# Software Demonstrations

- Marry the two records, change Elizabeth's last name to Rubble, add a salutation for "Betty", and show joint giving.



# Software Demonstrations

- They divorce. Show the database process. Are both of them still major donors?



# Grade the Demos



AREA	RATING	COMMENTS
Data Entry		
Prospect Management		
Volunteer Management		
Events Management		

# What's the alternative?





# Commercial Fundraising Software

YourCause LUMINATE™

StratusLIVE

blackbaud



frontstream

causeview™  
Helping those who help others

Jessitura network CRM  
Sumac CRM  
ClearView

fundraising software from SofTrek Corporation  
DonorCommunity  
The New Model for Giving in The Digital Age



easyware

FundTrack Software  
The Key to Fundraising Success

NETSUITE.ORG

TrailBlazer™  
Organize. Leverage. Succeed.

inRESONANCE

LIFELINE  
nonprofit Management System

Affinaquest™  
neon CRM  
FUND

TALISMA™ eZ



resultsplus  
part of your fundraising success

MatchMaker  
FUNDRAISING SOFTWARE

bloomerang

Donor Tools  
GROWING NONPROFITS

! VISIBLE RESULTS™

LGL LITTLE GREEN LIGHT  
DONOR MANAGEMENT CRM

salsa

FUNDLY CRM  
the data bank  
TECHNOLOGY FOR CHANGE™

FUNDRAISER software  
right beside you

DonorSnap  
Donor Management Made Easy

abila™

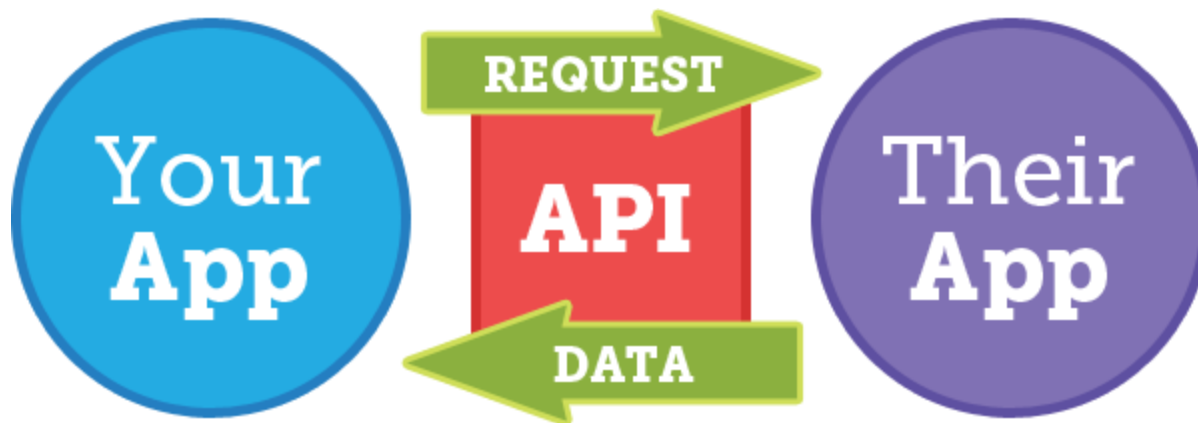
Qbase®

DonorPerfect  
Fundraising Software



# APIs and Integrations

- Open, closed, or unavailable?
- What does integrated really mean?
- Deep vs Shallow



# Budgeting

- Initial Planning
- One-time Fees
- Monthly Fees
- Import, Implement and Customize
- Staffing
- Process re-engineering
- Training
- Ongoing Support

# Keys to Success



## People

- Executive Sponsorship
- Collaboration
- Technical Skills
- Roles
- Personalities
- Politics



## Process

- Governance
- Planning and Budgeting
- Change Management
- Responsibility
- Accountability
- Clear Goals



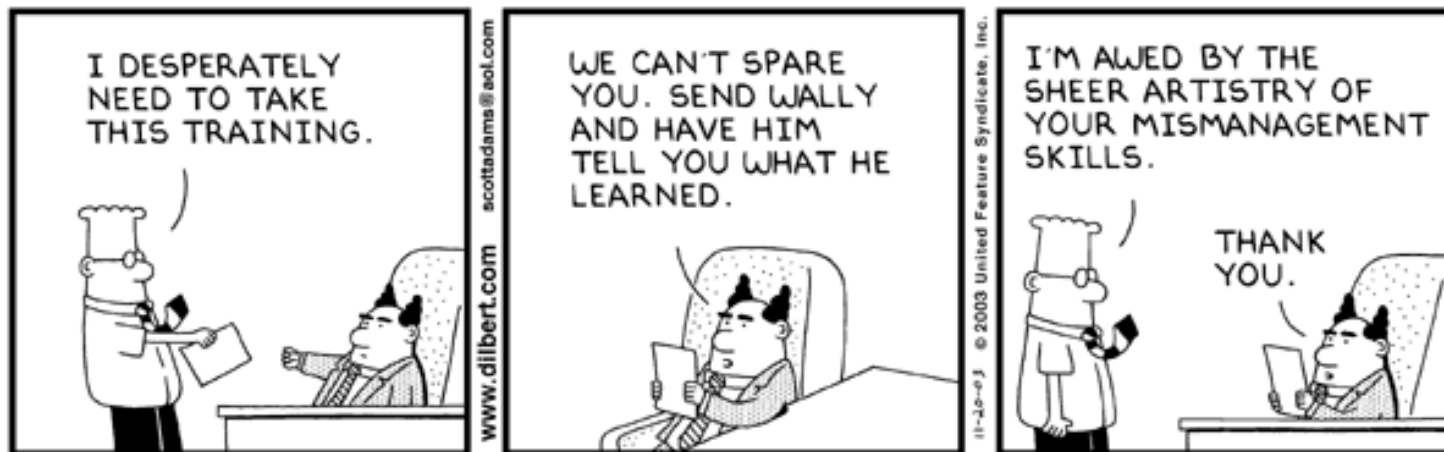
## Technology

- Project Management
- Vendor Selection
- Evaluation Criteria
- Capacity to Maintain

# Avoid the Lure of Shiny Objects



# Training Is Critical



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Everyone who interacts with your CRM will need training... more than once

- At least one staff person needs to become an expert in your CRM
- Senior leadership need to learn what the CRM is capable of

# What's Right For You?

- Donation and Online Fundraising
- Membership
- Website integration
- Volunteers
- Activists
- Event Management
- Costs and User Licenses
- Training and Support
- Reporting, Reporting, Reporting



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