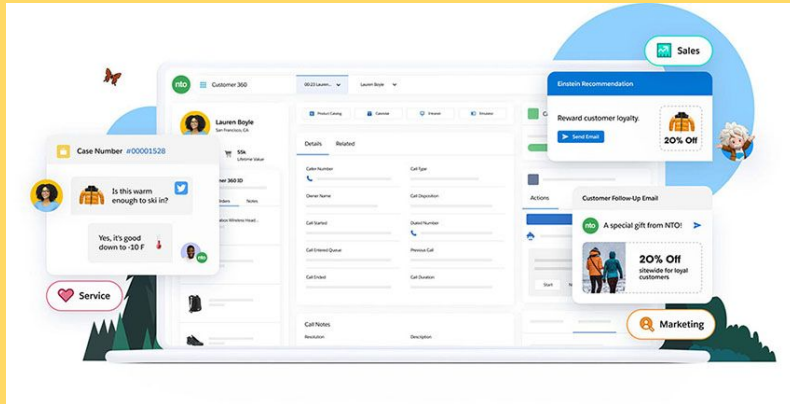


Why, how, and which donor management CRM for your nonprofit

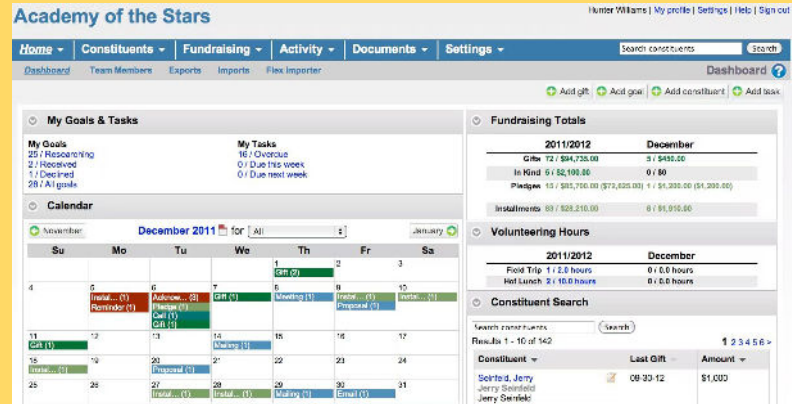


What is a CRM?

- CRM stands for “constituent relationship management” software
- CRMs are highly flexible software environments that can automate processes, manage data, and generate reports.
- Some CRMs are designed with nonprofits in mind, focusing on donors and funders as well as the typical consumer base.



Source: Salesforce



Source: LittleGreenLight

Telescope
Vision

Use cases for a CRM

CRMs can support many different areas of your work...

- Donor Management
 - ◆ Tax letters
 - ◆ Donation acknowledgements
 - ◆ Donor campaigns/engagement
- Building Management
 - ◆ Parking
 - ◆ Memberships
 - ◆ Scheduling
- Programs
 - ◆ Contract management
 - ◆ Classes
 - ◆ Event Management
- Accounting
 - ◆ AR workflows
 - ◆ AP workflows
- Communications
 - ◆ Segment for engagement
 - ◆ Newsletter planning
 - ◆ Correspondence tracking
- IT/Support
 - ◆ Help desk
 - ◆ Change management



Use cases for a CRM

...but most of the time, won't replace your existing softwares or systems. They will augment what you currently have.

CRM + Newsletter software

CRM + Accounting software

CRM + Survey tools

CRM + Contract software

CRM + IT tools

CRM + ...



What to do before you purchase a CRM

→ First, answer these questions

- ◆ What problems are we trying to solve by adopting a CRM?
 - Knowing what problems you are trying to solve steers you toward the right CRM solution.
- ◆ Who are our constituents? How can we better serve them?
 - Not all CRMs have the same feature set, you need to know exactly who you are trying to serve at the start before you purchase anything.
- ◆ What data or processes do we need to manage?
 - Different data require may suit a different solution. Knowing what data you have is just as important as knowing your constituent.
- ◆ How do we sustain the CRM and make it useful moving forward?
 - Staff workflows
 - Funding



What to do before you purchase a CRM

- Next, make lists from the answers to those questions
 - ◆ Data you need to manage
 - ◆ Staff who will interact with CRM
 - ◆ Processes you want to create
- These three lists serve as a rough template of your **business requirements** for the CRM. Implementation specialists use these build out your system with you.



+



+



Integrations and automations

Most CRMs will allow for integrations with your existing tools.

- Some have built-in integrations with tools you already use, like Mailchimp and Quickbooks.
- If there isn't a prebuilt integration, tools like [Zapier](#) will allow you to integrate your CRM with other tools you already use.

The MailChimp logo is displayed in a white rounded rectangle. It features the word "MailChimp" in a black, handwritten-style font.The Intuit QuickBooks logo is displayed in a white rounded rectangle. It consists of a green circle with the white letters "qb" inside, followed by the word "intuit" in a small, black, sans-serif font, and the word "quickbooks" in a larger, bold, black, sans-serif font.The Zapier logo is displayed in a white rounded rectangle. It features the word "zapier" in a bold, orange, sans-serif font, with a small orange asterisk-like symbol above the letter "i".

Integrations and automations

Even though you can automate some processes, it's important to remember the value of hands-on human interactions.

Processes where automation is useful

- Data import/export
- Updating systems
- Reminders

Processes where human engagement is more appropriate

- Donor engagement
- Funder engagement
- Project management

Or both!

- Segmentation*
- Templated messaging (tax letters, donation acknowledgements)*



How to pick the right CRM

Picking the right CRM for your org requires research beyond browsing websites

1. **Build a list.** [Here](#) is one to get you started.
2. **Create a [scorecard](#).**
3. Work with an **implementation specialist** to join you on demo calls.
4. **Schedule demos**, ask questions, and fill in your scorecard as you go.
5. Get a **quote** and **negotiate!**



Executive Summary

1. CRMs help organizations manage **people, places, and things** and are highly flexible.
2. There is **no one size fits all solution** for a CRM, the tools that software companies develop are **typically** designed for large organizations.
3. Hiring an **implementation specialist** is crucial if you are building out a CRM with lots of complexity. It will actually save you time and money if you invest up front.
4. Many things can be automated, but **certain tasks still need human capacity and care.**



About and Contact

Telescope Vision is a nonprofit technology consultancy and IT services provider located in North End, Detroit, Michigan.

Our goal is to support nonprofit organizations to be more safe, efficient and agile as work and programming become hybrid in our sector. We do this by providing sector expertise and breadth and curating our services to your organizational needs. Everything we do is designed with each individual client in mind.

Contact:

Jonathan Riley

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CRM List

- Salesforce
- LittleGreenLight
- EveryAction
- Kindful
- Bloomerang
- Salsa
- DonorPerfect
- NeonCRM
- WildApricot
- DonorBox*
- Airtable*



Scorecard

