4 Steps to Finding the Best CRM for Your Nonprofit

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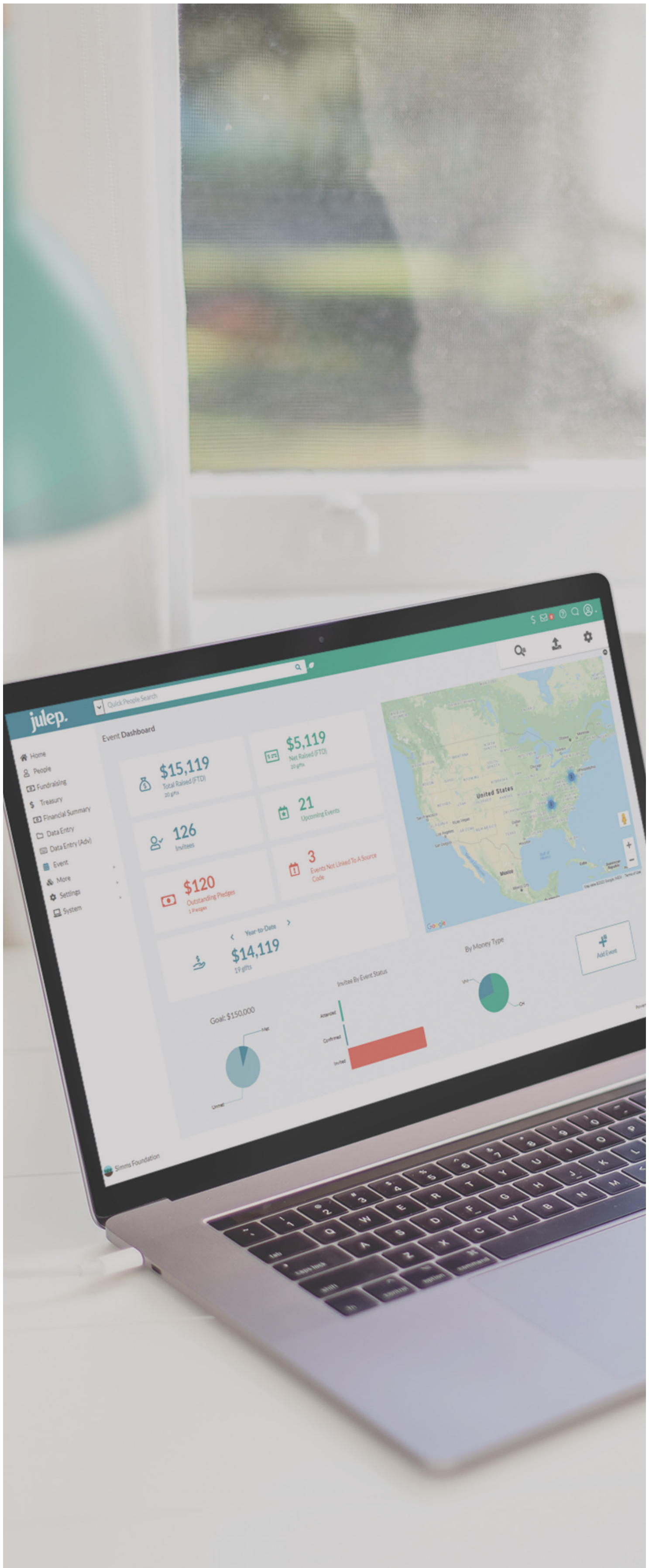


What is a CRM?

A CRM is a technology that manages all the relationships, interactions and data associated with key stakeholders at an organization. CRM is usually an acronym for either customer relationship management or constituent relationship management

A CRM provides a clear, 360-degree view of everyone you are trying to reach, such as donors, volunteers, and sponsors.

Why do you need a CRM?

A CRM can be a big investment for nonprofit organizations. While a CRM may cost more than managing your organization through spreadsheets & general office software, the benefits are worth the investment:

- CRMs are designed around the relationships you have with stakeholders.
- CRMs centralize and back-up data, relationships, and historical information, so it can't be lost to staff turnover or IT problems.
- CRMs offer at-a-glance dashboards to keep up with important data.
- CRMs offer robust reporting and analytical abilities that exceed simple spreadsheets.

Use this guide from Julep to outline your research and empower your decision process.

Step 1: Define the Three Biggest Needs

What do you need the CRM to do? Before looking at possible products, define the three most important needs you need the software or platform to perform. Possible functions could include:

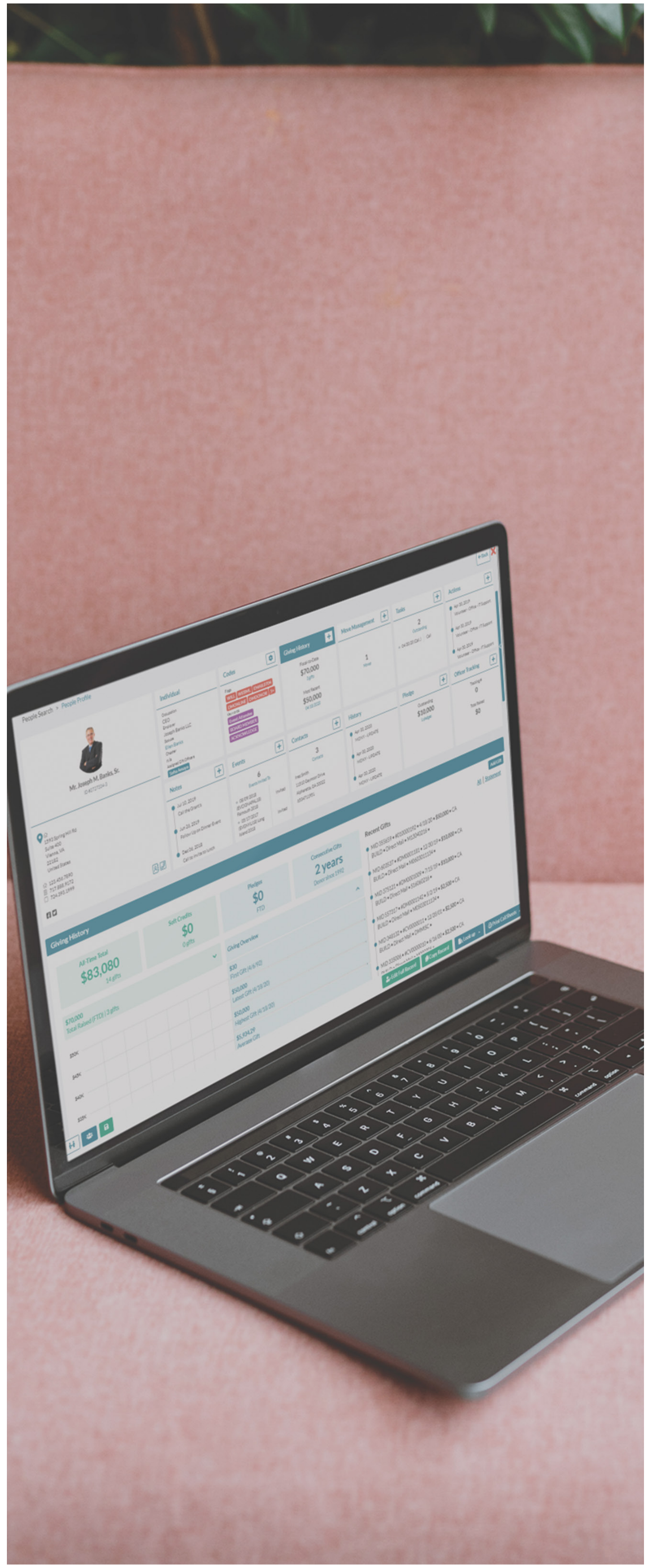
- Track fundraising campaigns, such as direct mail, major gifts, or sustainer giving programs
- Build profiles of donors, potential donors, partnering organizations, and funders
- Manage events from start to finish
- Moves Management to guide staff through the giving process
- Handle online giving
- Easy way to add data entry & store records
- Centralize data so that staff can work remotely
- Streamline billing, expense tracking, and administrative tasks
- Integrate email
- Volunteer management
- Handle grant tracking and proposals
- Media relations or social media management

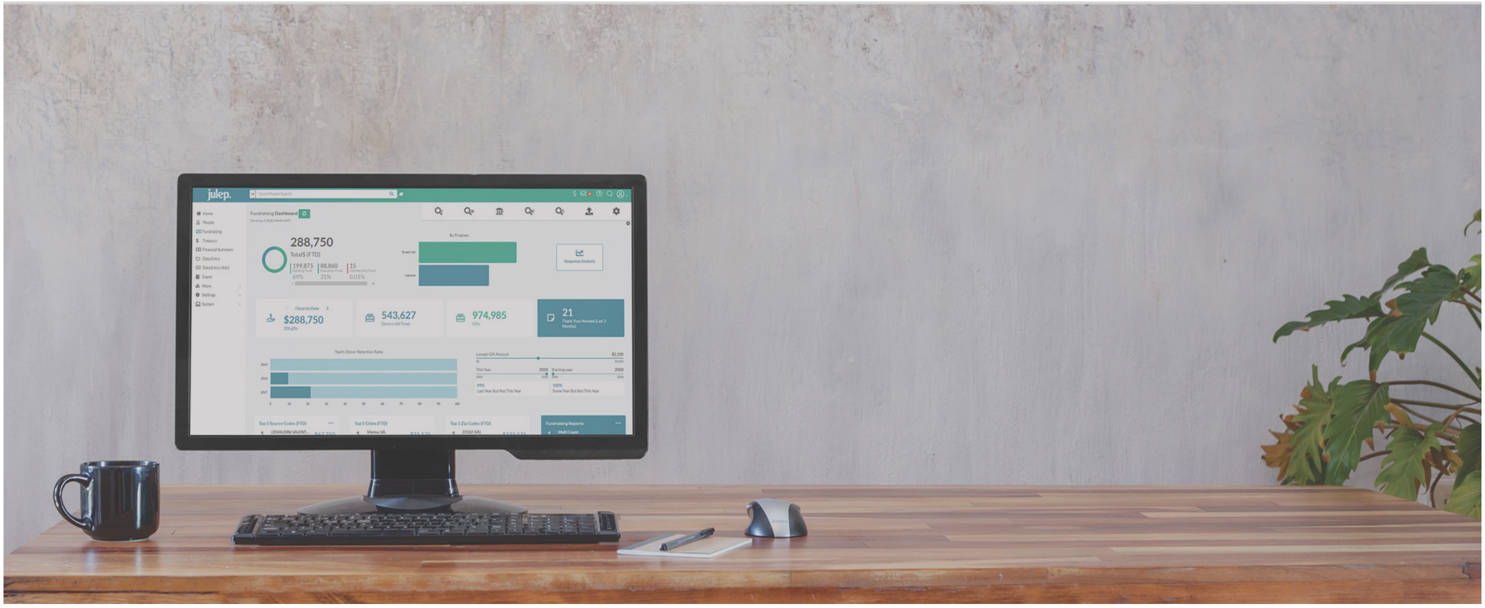
Step 2: Figure Out What Features Are Needed

Nonprofits frequently use CRMs that are either specifically designed for nonprofit organizations or customized from business sectors.

Establishing the top desired features can streamline your search. Before looking for CRM options, ask:

- What are the top five data points you need daily?
- What is your budget?
- How many people will be using it? Do they need different levels of permission?
- Do you have any other platforms/programs that need to sync with the CRM? Do your vendors?
- How much & what types of data will be stored?
- How much customization do you need?
- Will you be importing outside data? How often?
- What reports do you run every week & month?
- Do you need to access it remotely?





Step 3: Prepare Detailed Questions

Once you have the needs & features defined, make a list of questions to ask potential vendors while evaluating products. Here are possible questions to consider:

Pricing & Cost Questions

- How much does it cost?
- How are you billed (annually, monthly)?
- What are terms of contract for cancellation?
- What are the implementation/conversion fees?
- How many donor records included? How much are additional records?
- How many users are included? How much are additional users?

Usability Questions

- Can you test it out?
- Does your staff like using it?
- Can it be accessed by a mobile device?
- Can multiple users sign on at the same time with one login?
- Can you use it remotely?

Storage & Backups

- How is it backed up, locally or on a cloud?
- How often is it backed up? Are changes saved in real-time?

Training & Support Questions

- What customer support is available? What are the hours?
- How robust and current is the online helpdesk?
- Are there additional fees for customer support?
- What training is included with implementation?
- Are there videos for training-on-demand?
- Are there additional fees for extra training?

Implementation Questions

- What on-boarding services are included?
- How easy is it to use out-of-the-box?
- Do you need a specialized consultant or implementation strategy to get started?
- What default graphs or information do dashboards provide?
- Can dashboards be customized?
- What default reports are included?

Security & Tech

- What are the security protocols?
- Is there an API to sync multiple platforms?
- Does it require 2-Factor Authorization to log in?

Step 4: Build a Decision Matrix to Evaluate

Now that you've outlined your needs, decided on functionality, determined the type of CRM, and gathered answers from potential vendors, it's time to assemble all your data into a matrix that's similar to the example on the next page.

A decision matrix creates a chart out of the most important needs, data points, and functionality you identified in earlier steps. Once all your preferred features are listed, you can identify which possible CRMs best align.

This tool is helpful when trying to make a decision between several good options or when there are a number of factors to consider, such as budget, features, and learning curve. Furthermore, this activity helps when bringing several alternatives before a committee or board to make a final decision.

CRM Decision Matrix

	CRM #1 ______	CRM #2 ______	CRM #3 ______	CRM #4 ______
3 Biggest Needs				
1.				
2.				
3.				
Top 5 Daily Data Points Needed				
1.				
2.				
3.				
4.				
5.				
5 Most Important Features Needed				
1.				
2.				
3.				
4.				
5.				
Additional Features Needed				
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Get the Fresh CRM for Nonprofits

Julep offers the tools and features you need to streamline nonprofit management and fundraising so that you can focus on what's important -- building and cultivating relationships with donors.

Learn more about our flexible and comprehensive CRM by contacting the Julep team.

Schedule a demo today!

1-800-903-3777

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