

Finding the *Perfect* CRM

Connecting Up
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FundraisingForce

Intro

- ▶ Professional experience
- ▶ FundraisingForce
- ▶ Fundraising strategy
- ▶ Technology
- ▶ CRM searches
- ▶ CRM implementations



Agenda

- ▶ Overview of products available in market
- ▶ Six common misconceptions
- ▶ Who to involve
- ▶ Ten-point CRM search process
- ▶ Implementation of CRM
- ▶ Key takeaways

Products

- ▶ Fundraising platform
- ▶ CRM platform

Products - FR



thank()

- Fundraising platforms

eTapestry®

iMIS
by
asi ADVANCED
SOLUTIONS
INTERNATIONAL

Raiser's Edge NXT™

Blackbaud CRM™

Products - CRM



- ▶ CRM platforms



Misconceptions

- ▶ *I need to buy quickly*
- ▶ *I need to have it all*
- ▶ *Product “A” is the only one available*
- ▶ *Product “B” is the best available*
- ▶ *It must be good, X org uses it*
- ▶ *Product “C” will work out of the box*
- ▶ *I’ve used Product D before therefore...*



Who to involve?

- ▶ Cross section of staff
- ▶ Varying levels of staff
- ▶ Leadership
- ▶ Finance Committee
- ▶ Board

Ten-point process

- 1) Requirements gathering
- 2) Market research
- 3) Invitations
- 4) Request for Proposals (RFP)
- 5) Response meetings
- 6) Proposals
- 7) Demonstrations
- 8) Negotiations
- 9) Selection
- 10) Business Plan

Ten-point process

1) Requirements gathering

- Understand your org
- Articulate requirements
- Document your requirements
- Understand your business processes
- Understand data to be migrated



Ten-point process

2) Market research

- Understand available product
- Decide whether you want to include FR and/or CRM platform
- Conduct initial research

Ten-point process

3) Request for Proposals (RFP)

- Write the RFP
- Match RFP to Functional Requirements
- Ask for elaboration of points

Ten-point process



Foundation – Request for Proposals for CRM Acquisition and Implementation

Stephen Mally, CFRE

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Version 1



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Ten-point process

4) Invitations

- Invite suppliers based on market research
- Describe process/timeline
- Set boundaries

Ten-point process

- 5) Response meetings
- 1:1
 - Group
 - Answer questions
 - Respect supplier's time

Ten-point process

6) Proposals

- Selection Committee
- Accept on deadline
- Acknowledge
- Create evaluation form

Ten-point process

7) Demonstrations

- Entertain demonstrations
- Structured agenda
- Don't create a circus
- Value investment of supplier

Ten-point process

8) Negotiations

- Negotiate
- List price is not best price
- Driving the bus
- Competitive environment
- Contract

Ten-point process

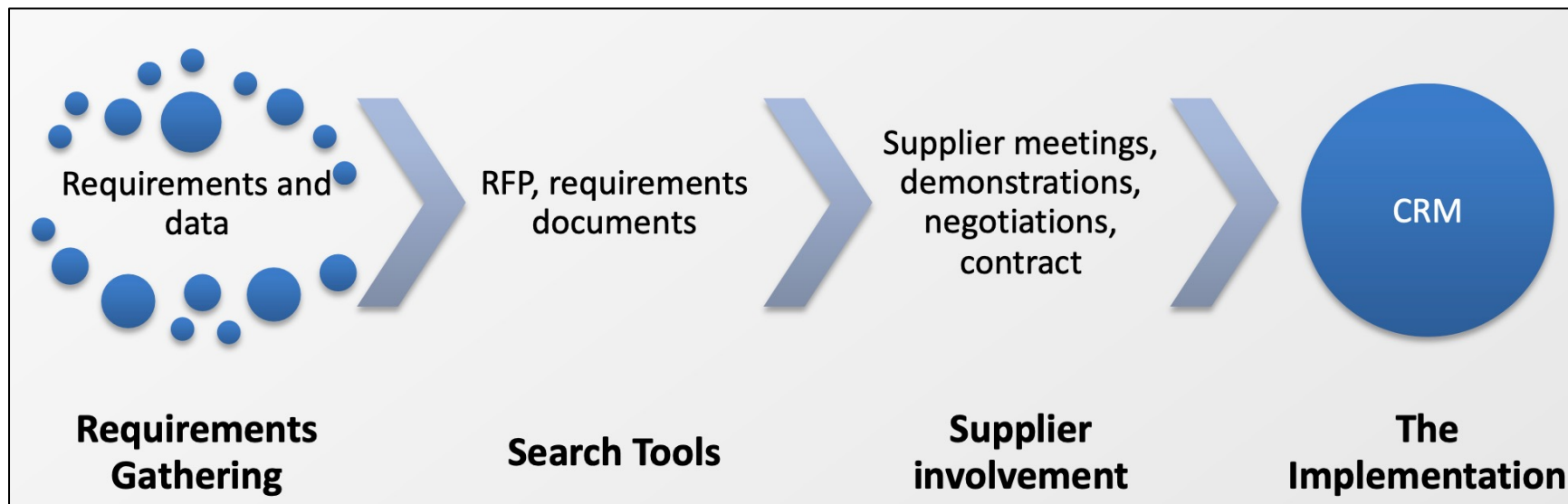
9) Selection

- Check referees
- Check non-referees
- Speak to former customers
- Select the best
- A relationship/not a transaction

Ten-point process

10) Business Case

- Write a solid business case
- For board/leadership
- Review process
- Due diligence
- Include true cost of ownership



Ten-point process

Implementation

- ▶ Start with the data, start early
- ▶ Build a precise SOW
- ▶ Ensure proper participation
- ▶ Engage a Project Manager



Takeaways

- ▶ Don't overbuy technology
- ▶ Acquire something you can grow into
- ▶ Ensure organisation readiness
- ▶ Know what you are looking for and find it
- ▶ Understand your requirements

Takeaways

- ▶ Make sure suppliers understand your requirements
- ▶ Separate yourself from supplier influence
- ▶ Not buying *buttonology*/you are acquiring a relationship
- ▶ Hire a consultant to run CRM search process for you

Questions?

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