Finding the *Perfect*CRM

Connecting Up
Stephen Mally CFRE FFIA



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



Thankyou



Polls

▶ Does you organisation have a CRM?



Polls

► Are you looking for a new CRM?



Products

- ► Fundraising platform
- ► CRM platform



Products - FR







Fundraising platforms

eTapestry®

Raiser's Edge NXT™









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





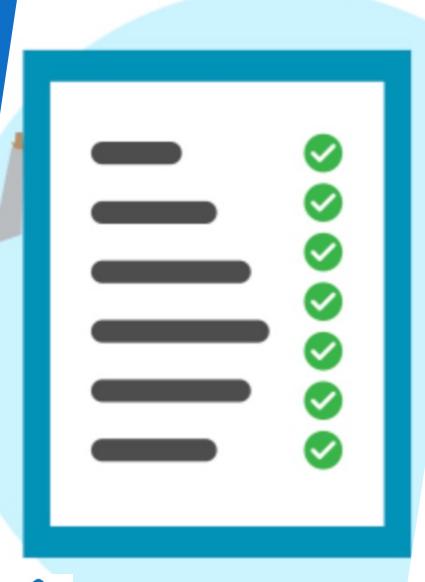


Who to involve?

- Cross section of staff
- Varying levels of staff
- Leadership
- ► Finance team
- Board

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





- 1) Requirements gathering
 - Understand your org
 - Articulate requirements
 - Document your requirements
 - Understand data to be migrated





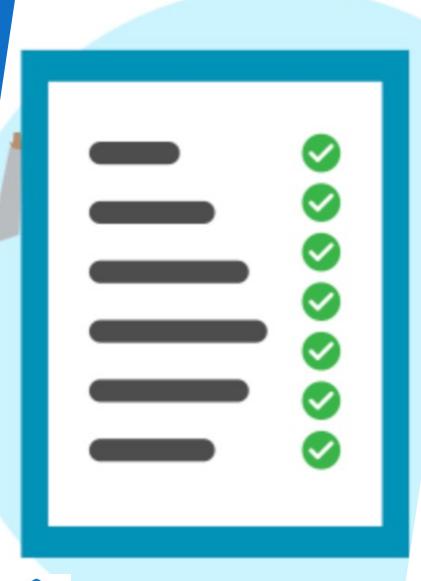
AREA						
RESPONSE						
CONFIG	This feature will be able to be met with some configuration by supplier					
CUSTOM	This feature requires a customisation by supplier, which will add costs to the project					
THIRD PARTY APP	This feature is met by integration with a third party application					
CANNOT BE MET	This requirement cannot be met					



Supplier Name:

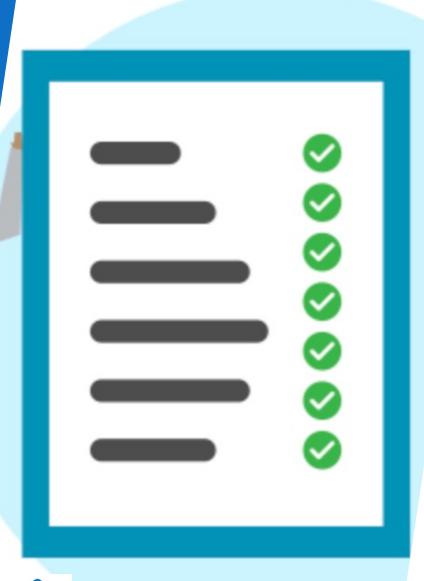
REQUIREMENT NUMBER	REQUIREMENT AREA	ESSENTIAL OR DESIRED	PHASE	CONFIG	CUSTOM	THIRD PARTY APP	CANNOT BE MET
HV	High Value Fundraising						
HVM.1	Major Donors						
HVM.1.1	Native ability to track moves management in CRM	Essential	I				
	Dedicated space to track financial details/publicly available financial holdings of				1 1		
HVM.1.2	prospect	Essential	I				





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





- Request for Proposals (RFP)
 - Write the RFP
 - Match RFP to Functional Requirements
 - Ask for elaboration of points





4 fundraising force

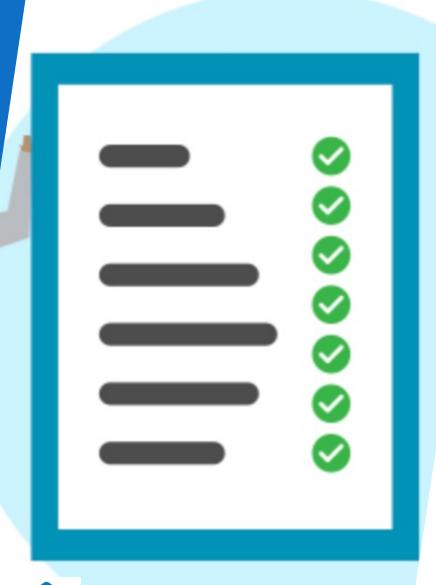
Foundation – Request for Proposals for CRM Acquisition and Implementation

Stephen Mally, CFRE
14 July 2020
Version 1



4 fundraising force

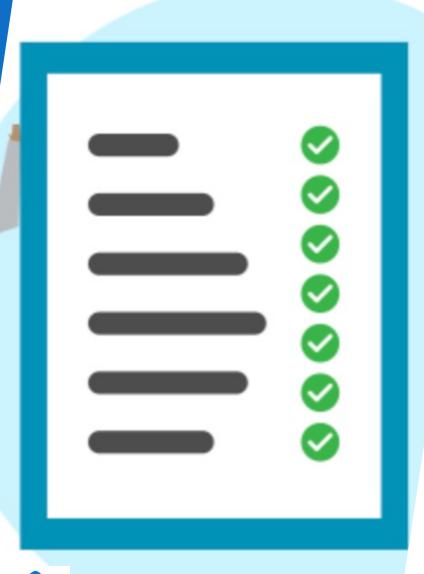
1	EX	ECUTIVE SUMMARY	
	1.1	Process	
	1.2	Important Note	4
2	AB	OUT	5
3	TH	IE CRM SEARCH PROCESS	
	3.1	Platform and Partner Research	6
	3.2	Confidentiality/Non-Disclosure Agreements	6
	3.3	Partner Invitations	
	3.4	Functional Requirements Gathering	
	3.5	Functional Requirements Review	6
	3.6	Request for Proposals (RFP) Written	6
	3.7	RFP Released	7
	3.8	RFP Response	7
	3.9	Response Acknowledgement	7
	3.10	Response Review	7
	3.11	Demonstrations	8
	3.12	Additional Session	8
	3.13	Business Case	
	3.14	About the Consultant/FundraisingForce	8
	3.15	Key Areas	10
4	CO	ONFIDENTIALITY	2
5	BU	ISINESS REQUIREMENTS 1	3
	5.1	Standard Approach/Start with Essentials	13
6	MI	SCELLANEOUS INFORMATION REQUIREMENTS 1	4
	6.1	Firm Background	4
	6.2	Implementation Team and Implementation Methodology	14
	6.3	Customer Service	16
	6.4	Customer Support	
	6.5	Ongoing Consulting Services	
	6.6	Product	
	6.7	Product Comparison	
	6.8	Website and Third Party Fundraising Platform	
	6.9	Payment Gateways	
	6.10	Data Migration - Importing	
	6.11	Project Comparison	
	6.12	Configuration vs. Customisation	
	6.13	Integrations	
	6.14	Training Options	
	6.15	Pricing	18
_	AP	PENDIX	
/			
S	UPPL	EMENTAL INFORMATION2	0
S	UPPL 7.1	EMENTAL INFORMATION 2 Data Inventory 2	



4) Invitations

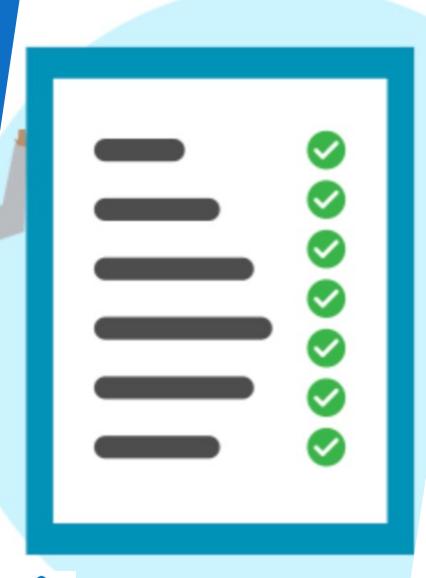
- Invite suppliers based on market research
- Describe process/timeline
- Set boundaries





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

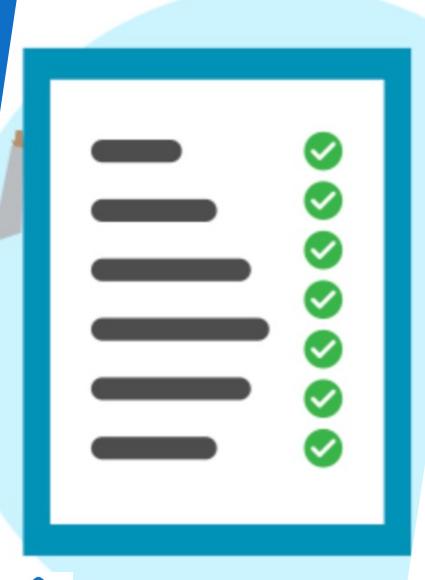




6) Proposals

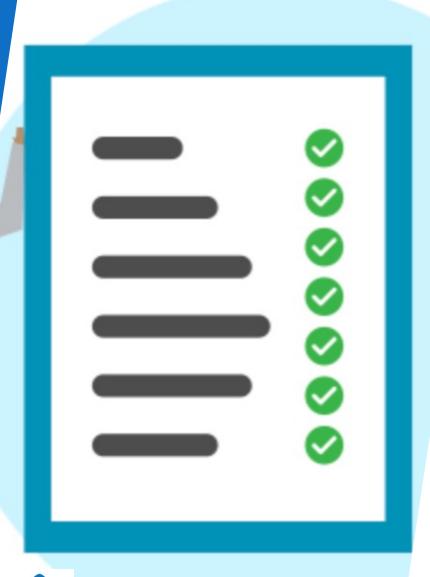
- Selection Committee
- Accept on deadline
- Acknowledge
- Create evaluation form





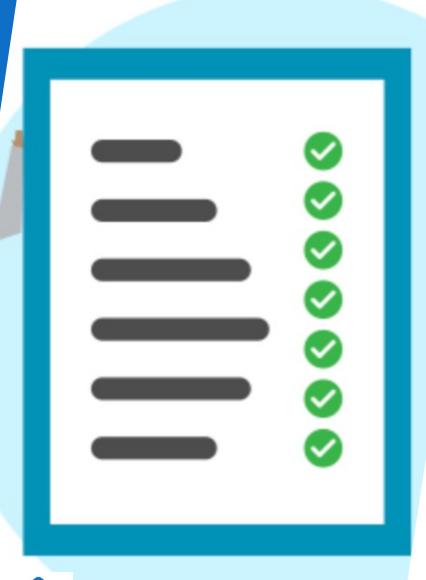
- 7) Demonstrations
 - Entertain demonstrations
 - Structured agenda
 - Don't create a circus
 - Value investment of supplier





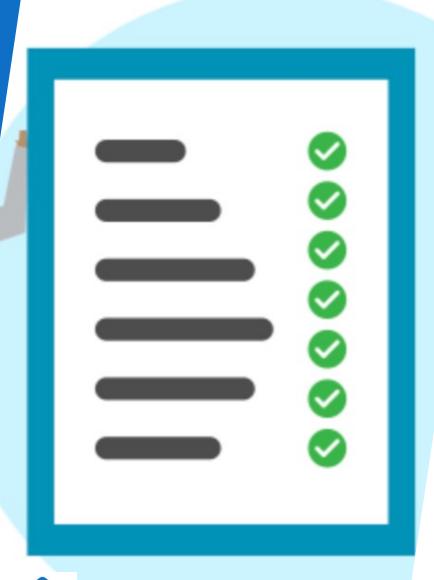
- Negotiations
 - Negotiate
 - List price is not best price
 - Driving the bus
 - Competitive environment
 - Contract





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

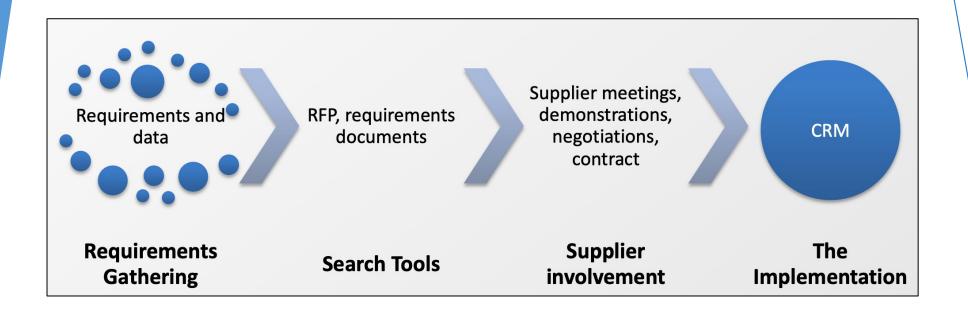




10) Business Case

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







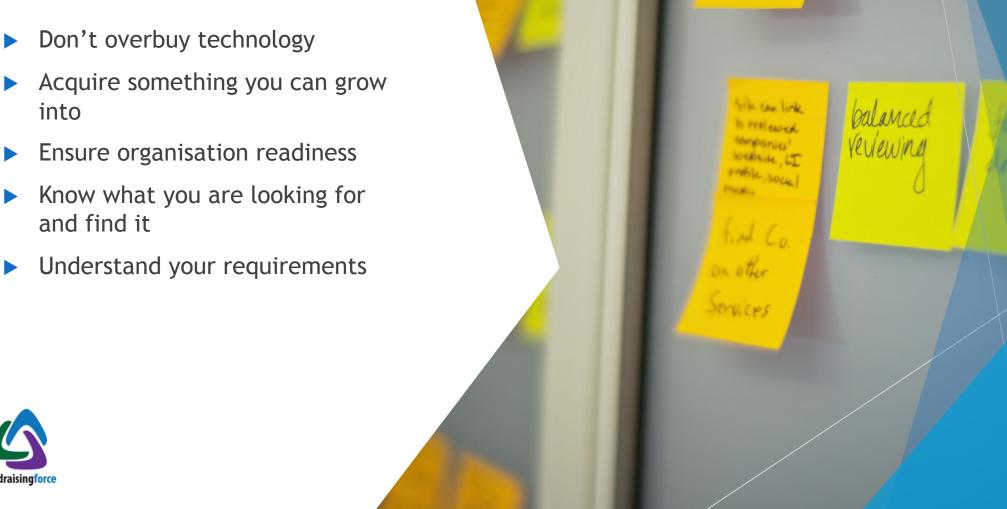
Implementation

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





Takeaways





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









Contact me



