

# Finding the *perfect* CRM


CRM Search



# Finding the *perfect* CRM

## CRM Search

### Welcome

- Introduction
  - Professional experience
  - FundraisingForce
  - CRM searches
  - CRM implementations
  - Product agnostic
  - @FRaisingForce 



# Finding the *perfect* CRM

## CRM Search

### What we will cover

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

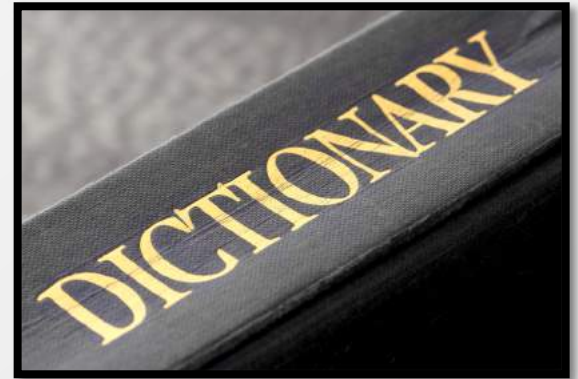


# Finding the *perfect* CRM

## CRM Search

### Definitions

- *Database*
- *Fundraising system*
- *CRM*
- *Organisation-wide CRM*



# Finding the *perfect* CRM

## CRM Search

### Products available in the marketplace

- Products vary in shapes and sizes
- Selection can be overwhelming
- Known/unknown





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CRM Search

Raiser's Edge NXT™

 Microsoft  
Dynamics CRM

 salesforce

iMIS20



nonprofit  
success  
pack

eTapestry™

thank()

Blackbaud CRM™

 fundraisingforce

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## CRM Search

### Six common 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*



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### Who to involve in the search

- Involve a broad base of staff
- Consider various levels of staff
- Seek diverse opinions
- Remember you are trying to manage change/gain buy in



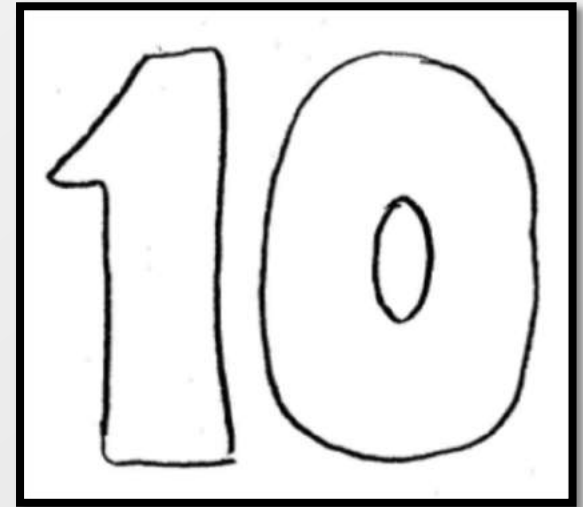


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## CRM Search

### FundraisingForce ten point CRM search process

- 1) Requirements gathering
- 2) Market research
- 3) Invitations
- 4) Request for Proposals (RFP)
- 5) Response meetings

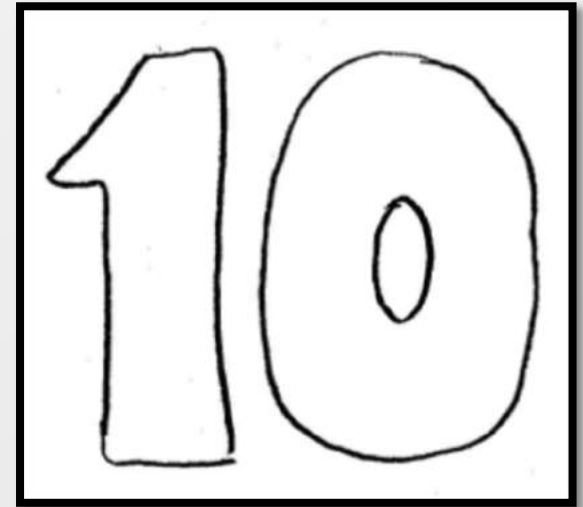


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## CRM Search

### FundraisingForce ten point CRM search process

- 6) Proposals
- 7) Demonstrations
- 8) Negotiations
- 9) Selection
- 10) Business plan



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## CRM Search

### FundraisingForce ten point CRM search process

- 1) Requirements gathering
  - Think you know your organisation?
  - Are you able to fully describe your requirements to suppliers?
  - Are your requirements fully documented?
  - Data to be converted

# CRM Search

## 2) Market research

- [illegible]

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## CRM Search

### FundraisingForce ten point CRM search process

- 3) Request for Proposals (RFP)
  - Write the RFP
  - Match the RFP to the requirements
  - Ask for elaboration on key points





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## CRM Search

### FundraisingForce ten point CRM search process

#### 4) Invitations

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



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## CRM Search

### FundraisingForce ten point CRM search process

- 5) Response meetings
  - Conduct response meetings
  - Open communication with suppliers
  - Answer questions



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### FundraisingForce ten point CRM search process

#### 6) Proposals

- Accept proposals by firm deadline
- Create evaluation/scoring device
- Compare/contrast
- Use supplier time wisely



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### FundraisingForce ten point CRM search process

#### 7) Demonstrations

- Entertain demonstrations
- Structured environment
- Consider who to include (buy-in)
- Don't create a circus for supplier
- Remember supplier investment
- Consider scripting demos



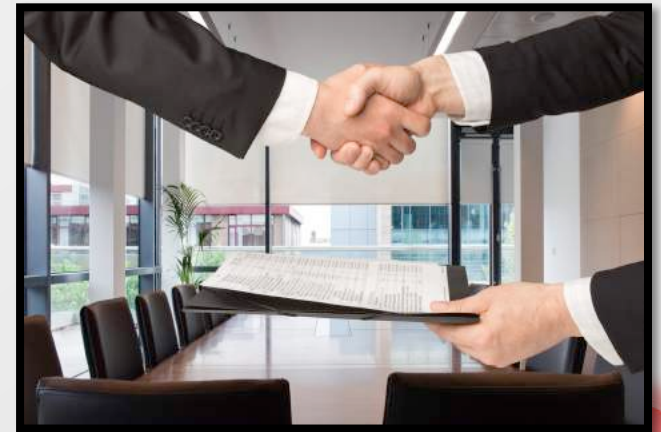
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### FundraisingForce ten point CRM search process

#### 8) Negotiations

- Negotiate
- List price is not best price
- Other NFP
- Competitive environment
- Contracts





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### FundraisingForce ten point CRM search process

#### 9) Selection

- Check references
- Check non-references
- Speak to former customers
- Select best of lot
- Purchase the relationship



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### FundraisingForce ten point CRM search process

#### 10) Business case

- Write a solid business case
- Review process
- Include costs
- Include true cost of ownership in costs



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### Implementation of the CRM

- Can be the painful part
- SOW
- Time-consuming
  - Many mid-large organisations take 9-12+ months to implement
- Engage a project manager to represent your organisation

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### Key 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

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## CRM Search

### Key takeaways

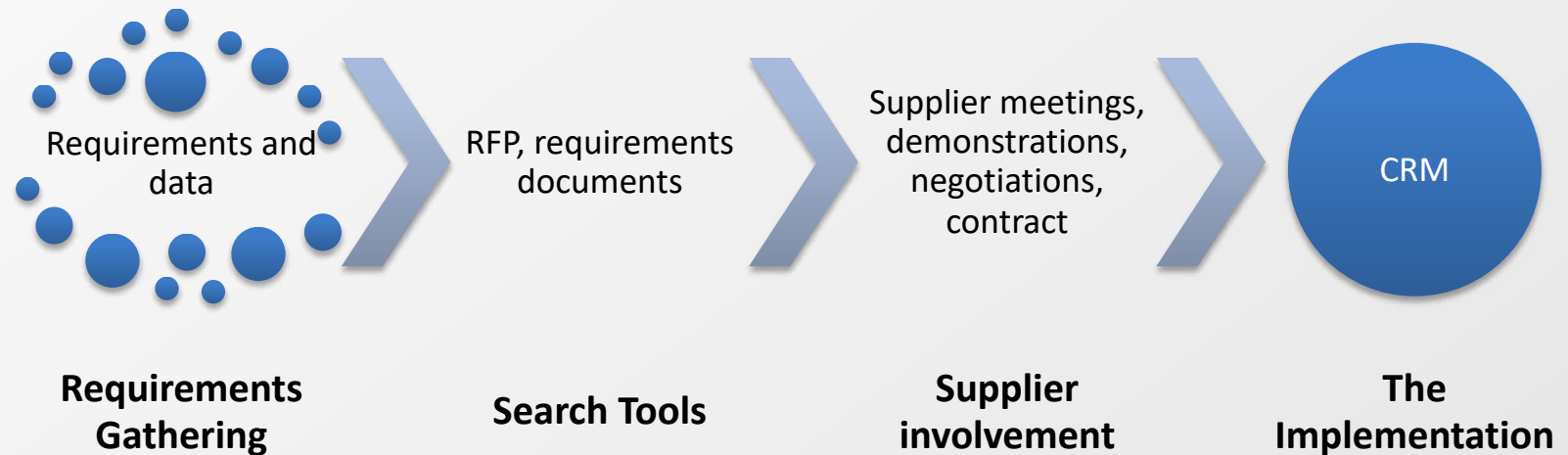
- Make sure suppliers understand your requirements
- Separate yourself from supplier influence
- Not buying *buttonology*/acquiring a relationship
- Hire a consultant to run CRM search process for you



# Finding the *perfect* CRM

## CRM Search

In sum...



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