E-GUIDE

eleo®

Online donor management software

choosing donor management software: **a guide and worksheet for comparing nonprofit crms**

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introduction

CRM Software has exploded. With so many options, it can make the process of comparing and choosing the right solution difficult. Even the language itself can be confusing because providers use different terminology for the same tool; or use the same terminology but mean different things.

First and foremost, CRM Software is an incredibly general term. CRM stands for Customer Relationship Management. In other words, a software that manages any relationship under the sun. As a nonprofit, it's critical you explain what type of CRM you are searching for. For example, donor management software is a customer relationship management (CRM) system for nonprofits. It focuses on building relationships with your donors, constituents, volunteers, and basically anyone who supports your cause. In other words, donor management software is a nonprofit CRM.

When completing a nonprofit CRM comparison, the focus should be on a number of things - features, cost, integrations, usability, and support - are just a few of the most critical aspects to research and ask questions about.

quick tip

an accompanying worksheet is provided at the end of this e-guide, to help you stay organized when comparing nonprofit crms.

5 Areas to Focus on When Comparing Nonprofit CRMs

1. Must-Have Features vs. Nice-To-Have Features
2. Pricing Structure
3. Support & Training
4. Onboarding
5. Demos & Free Trials

1 must-have features vs. nice-to-have features

There is a huge difference in features your organization needs versus features your nonprofit wants. Make a list of both. Must-have features are non-negotiable. If a system you were considering doesn't have your must-haves, cross it off the list.

Nice-to-haves are the features you would like to have in a perfect world but you can live without. Be wary of claims that a system has "everything." Bells and whistles look impressive, but they can be very expensive and more often than not, go unused by small nonprofits.

Core features to look for and critical questions to ask about each:

- **Contact records –**
  - How are they set up?
  - Are they easy to use and search?
  - Are they customizable? If so, how?
- **Integrations –**
  - Who does the nonprofit CRM integrate with?
  - Do they integrate with an email marketing platform?
  - If so, which ones?
  - Do they integrate with a calendar application?
  - What accounting software do they link up to?
  - Which payment processors do they use?
  - Any additional integrations that your small nonprofit would use?

- **Reporting –**
  - What types of reports are included?
  - What reports cost extra?
  - Is a report writer for creating custom reports included?
  - Is there a limit to the types or number of reports you can generate monthly?
- **Online Forms –**
  - What types of online forms are included (donation, membership, contact, event registration, etc.)?
  - Is there a cost for each or any?
  - Are there limits to the number of online forms you can use?
- **Additional Features –**
  - What else can the system do? What other modules are available?
  - Are all modules included or do certain components cost extra?
  - Are there any particular features that set your software apart?

quick tip

Most small nonprofits don't know that nonprofit credit card rates are lower than business rates. If you are a registered 501c3, be sure you receive the lower rate when accepting donations. And, always ask the nonprofit CRM what their cut is!

2 pricing structure

Keep in mind that a nonprofit CRM comparison is not always apples-to-apples in terms of pricing. Every software creates a unique pricing structure. There could be tiers based on number of records, fluctuating levels of support, add-on modules, and more. Different components are included in different packages. It's important to be able to recognize which components are apples-to-oranges, so you can understand the value of each nonprofit CRM and make an informed decision.

Critical questions to ask about pricing:

- Is cost based on the number of contact records in the system?
- Is cost based on the modules included on the system? Is it based on both? Or a number of components?
- Is there a cost to add on modules? If so, what is that cost?
- What is the cost of phone support?
- What is the cost of email support?
- What is the cost of initial trainings? Continuous trainings?
- What are the credit card processing fees? What is the breakdown of these fees? Who is getting a cut?
- Are there startup fees? If so, what are they?
- Are there import costs? If so, what are they?

3 support & training

While it's been mentioned previously, support and training needs for your nonprofit are of particular importance. Further, support and training options vary wildly across software. This makes for a more complex conversation.

Your team will need to determine the level of support you'll require to use the software effectively. This will vary, based upon each user's comfort with technology. Additionally, the way the support is offered and priced across softwares usually differs dramatically. Your team will need to ask specific questions when comparing nonprofit crms.

Critical questions to ask about support & training:

- Is phone support available? Is email support available? What are the respective costs of each?
- When is support reachable? 24/7? 9am-5pm? Which time zone?
- Do I ever talk to a robot?
- Is support outsourced? Or in-house?
- What are the normal response, hold, and/or turnaround times? Immediate? Within 24-hours?
- Are initial trainings included? What are the associated costs?
- Are continuous trainings available? What are the associated costs?
- When are trainings available? Certain days of the week? Always?
- Who has access to training? All users? Only certain ones?
- What is the training format? Personalized? Group? Or both?

4 onboarding

Getting familiarized with a new nonprofit CRM is usually the largest hurdle for small nonprofits. From learning the ropes, to getting data imported, the process of acquainting yourself to a new donor management software can feel daunting. That's why a company's onboarding process is so important to ask about.

The questions below will help you learn which company provides the best onboarding support:

- Are there any startup fees? If so, what are they and what do they include?
- How is data migration handled? Does the company complete your import? What are the associated costs?
- What is the usual turnaround time on imports?
- Are you as an organization expected to complete your import independently?
- Is a consultant needed for the import?
- Is hiring a consultant necessary to learn the system, as a whole?
- Are any start up trainings included?
- How long does it generally take users to learn the system?
- How much contact does the company make with you, across the process of onboarding?
- What is the standard onboarding timeline?

5 demos & trials

You should be able to see and test solutions before making your decision. Most nonprofit CRM companies offer demos and trials, but not all are created equal. That's why educating yourself on the actual exploration process is equally important. Demos should allow you to explore the nonprofit crm with a trained professional. You can ask questions, see the system live, etc.

No matter what a company explains on a demo, or sells you over the phone, your nonprofit absolutely must assess a software live before committing to it. Trial periods allow you to explore the nonprofit crm software in real time. You can get a feel for the workflow, the ease-of-use, and the customer support experience.

Important questions to ask nonprofit CRMs about their demo and trial offerings:

- Do they offer live demos? When?
- Do they offer video demos? How up-to-date is this video?
- Are live demos completed in groups or are they personalized?
- Are they willing to provide a customized demo based on your nonprofit's specific needs and the features you want to examine more closely? The provider's flexibility with demos is an indication of how much they care about your nonprofit finding the right fit, and how far they're willing to go to support your success.
- Is there a cost for a live demo? Is there a cost for a video demo?
- Does the nonprofit CRM offer a trial period?

- What is the length of the trial? One week, two weeks, a full month?
- Is there a cost associated with a trial? Or is it completely free?
- Are all features available on a free trial? If not, how do I explore the features that are not offered?
- Is support included during the free trial? If so, what kind?
- Is a credit card required?

quick tips

- **Some of these questions may feel redundant. That's okay! The important thing is that they're asked and answered in full.**
- **Psst! Check out the associated worksheet below for help.**

nonprofit crm comparison worksheet

DIRECTIONS: DOWNLOAD AND/OR PRINT THIS MULTI-PAGE WORKSHEET FOR EACH NONPROFIT CRM YOU ARE INTERVIEWING

NAME OF NONPROFIT CRM:
DATE OF DEMO/INTERVIEW:
PRESENTER:
TEAM MEMBERS WHO ATTENDED:

QUESTIONS ON -
must-have features vs. nice-to-have features

- **Contact records –**
  - How are they set up?
  - Are they easy to use and search?
  - Are they customizable? If so, how?
- **Integrations –**
  - Who does the nonprofit CRM integrate with?
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  - Do they integrate with a calendar application?

    - What accounting software do they link up to?
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    - Any additional integrations that your small nonprofit would use?

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    - What types of reports are included?
    - What reports cost extra?
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- **Online Forms –**
    - What types of online forms are included (donation, membership, contact, event registration, etc.)?
    - Is there a cost for each or any?
    - Are there limits to the number of online forms you can use?

- **Additional Features –**
    - What else can the system do? What other modules are available?
    - Are all modules included or do certain components cost extra?

- Are there any particular features that set your software apart?

QUESTIONS ON - pricing structure

- Is cost based on the number of contact records in the system?
- Is cost based on the modules included on the system?
- Is it based on both contact #s and modules? Other components?
- Is there a cost to add on modules?
    - If so, what is that cost?
- What is the cost of phone support?
- What is the cost of email support?
- What is the cost of initial trainings? Continuous trainings?
- What are the credit card processing fees?
    - What is the breakdown of these fees? Who is getting a cut?
- Are there startup fees?
    - If so, what are they?
- Are there import costs?
    - If so, what are they?

QUESTIONS ON - support & training

- Is phone support available?
  - What is the cost?
- Is email support available?
  - What is the cost?
- When is support reachable?
  - 24/7? 9am-5pm? Which time zone?
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QUESTIONS ON - onboarding

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  - If so, what are they and what do they include?

- How is data migration handled?
  - Does the company complete your import?
    - What are the associated costs?

- What is the usual turnaround time on imports?

- Are you as an organization expected to complete your import independently?

- Is a consultant needed for the import?

- Is hiring a consultant necessary to learn the system, as a whole?

- Are any start up trainings included?

- How long does it generally take users to learn the system?

- How much contact does the company make with you, across the process of onboarding?

- What is the standard onboarding timeline?

QUESTIONS ON - demos & trials

- Do they offer live demos?
  - If so, when are demos available?
- Do they offer video demos?
  - How up-to-date is this video?
- Are live demos completed in groups or are they personalized?
- Are they willing to provide a customized demo based on your nonprofit's specific needs and the features you want to examine more closely?
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- What is the length of the trial?
  - One week, two weeks, a full month?
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- Are all features available on a free trial?
  - If not, how do I explore the features that are not offered?
- Is support included during the free trial?
  - If so, what kind?
- Is a credit card required?

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Donor Management Software

Move your nonprofit online with Eleo.

Eleo Donor Management Software can play an important role in moving your nonprofit forward virtually. With Eleo's features and integrations, your database can become your hub for tracking your team's tasks, donor communication, gifts, and much more. Also, Eleo gives you the tools to continue fundraising online with branded donation pages and online event registration forms. Our software is top-rated in usability and includes live support, so you can put your energy where it matters most.

WATCH DEMO

ELEO INTEGRATIONS

Constant Contact | MailChimp | stripe | Google Calendar

SEE ALL