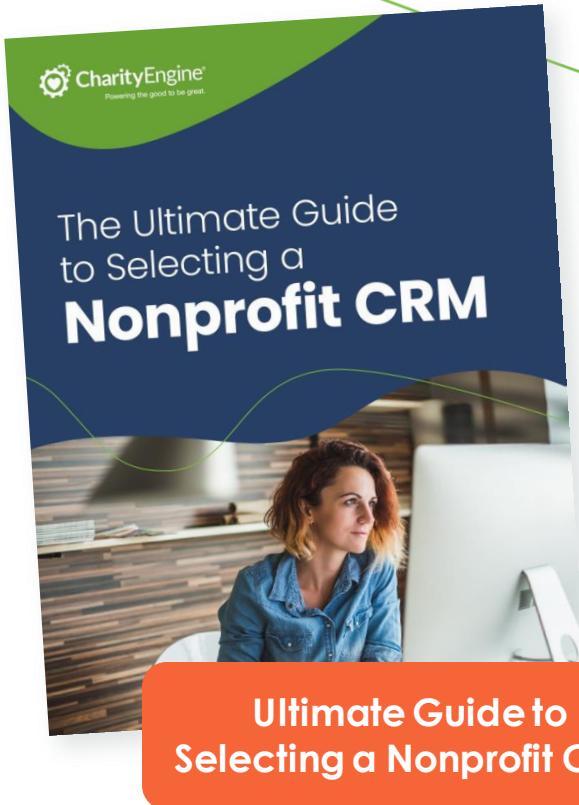


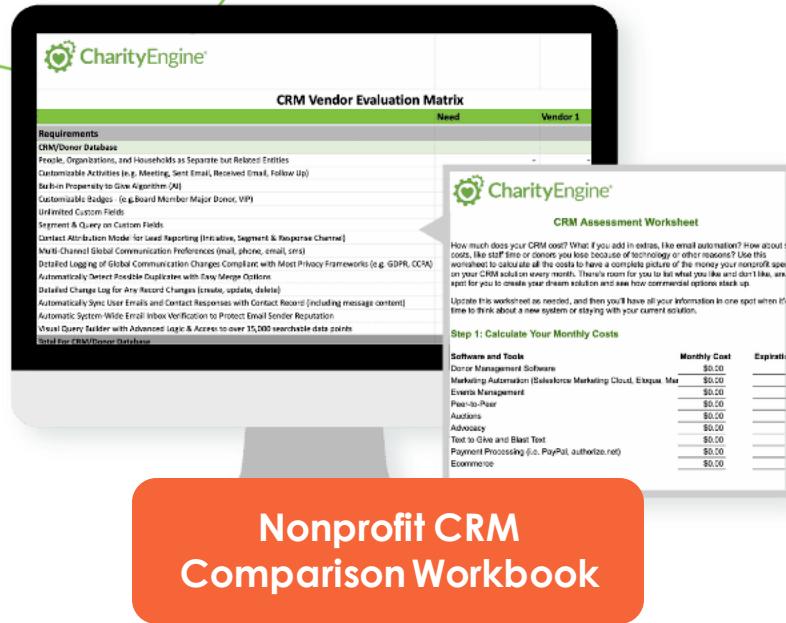
Resources



The Ultimate Guide to Selecting a **Nonprofit CRM**

CharityEngine®
Powering the good to be great.

Ultimate Guide to Selecting a Nonprofit CRM



CRM Vendor Evaluation Matrix

Requirement	Need	Vendor 1
CRM/Donor Database	High	Low
Profile, Organizations, and Households as Separate but Related Entities	Medium	Medium
Customizable Activities (e.g. Meeting, Sent Email, Received Email, Follow Up)	High	Medium
Built-in Properly to Give Algorithm (AI)	Medium	Medium
Customizable Badges (e.g. Board Member, Major Donor, VIP)	Medium	Medium
Unlimited Custom Fields	Medium	Medium
Report & Query on Custom Fields	Medium	Medium
Segmentation & Reporting (Iterations, Segments & Response Channel)	High	Medium
Multi-Channel Global Communication Preferences (mail, phone, email, sms)	Medium	Medium
Detailed Logging of Global Communication Changes Consistent with Most Privacy Frameworks (e.g. GDPR, CCPA)	Medium	Medium
Automatically Connect ReadWrite Donations with Easy Keep Outcomes	Medium	Medium
Detailed Change Log for Any Record Changes (Create, Update, Delete)	Medium	Medium
Automatically Sync User Emails and Contact Responses with Contact Record (including message content)	Medium	Medium
Automatic System-Wide Email Inbox Verification to Protect Email Sender Reputation	Medium	Medium
Visual Query Builder with Advanced Logic & Access to over 15,000 searchable data points	Medium	Medium
Central CRM/Donor Database	Medium	Medium

CRM Assessment Worksheet

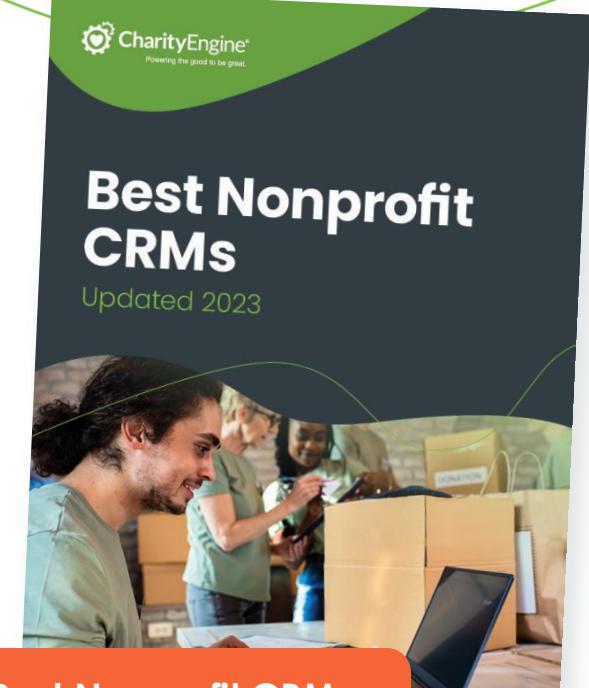
How much does your CRM cost? What if you add in extras, like email automation? How about costs, like staff time or equipment? How does your CRM use of data compare to your competitors? Use this worksheet to answer all these questions and get a clear picture of the money you'll need to invest up front on your CRM solution every month. There's room for you to list what you like and don't like, expect for you to create your dream solution and see how commercial options stack up.

Update the worksheet as needed, and then you'll have all your information in one spot when it's time to think about a new system or staying with your current solution.

Step 1: Calculate Your Monthly Costs

Software and Tools	Monthly Cost	Expiration
Donor Management Software	\$0.00	
Marketing Automation (Salesforce Marketing Cloud, ExactTarget)	\$0.00	
Event Management	\$0.00	
Peer-to-Peer	\$0.00	
Auctions	\$0.00	
Advocacy	\$0.00	
Text to Give and Blast Text	\$0.00	
Payment Processing (i.e. PayPal, authorize.net)	\$0.00	
E-commerce	\$0.00	

Nonprofit CRM
Comparison Workbook



CharityEngine®
Powering the good to be great.

Best Nonprofit CRMs

Updated 2023

Volunteers packing boxes at a donation center.

Best Nonprofit CRMs
(Updated 2023)

