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Powering the good to be great.

Seven Easy Ways to Evaluate Your CRM

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A Checklist:

Seven Key Questions to Evaluate Your CRM

Is my technology outdated or being sunsetted?

Has my team developed workarounds to accomplish basic tasks?

Can I extract actionable data from my platform?

Does support offer the timely help we need?

Can we measure core KPIs?

Are costs escalating?

Has it been more than three years since we've seen what's around?

Identifying the Best Tech for Your Nonprofit

It's As Easy As ABC...

is for Analyze

How Many Data Sources Do You Have?

What is the Function of Each?

What is the Cost of Your Current Systems?

How Many Contacts Are In Your Database?

B is for Break Data Silos

What Core Functionality Can Go Into One System?

What Third-Party Software Do You Need?

Uncomplicate! Don’t Want Too Many Hands in the Cookie Jar

is for Compare

Research Nonprofit CRMs

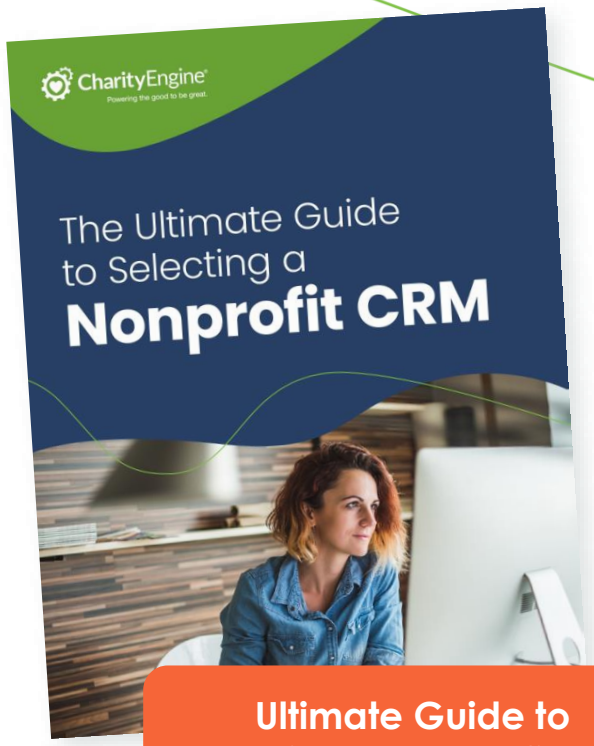
Compare Apples to Apples

Beware of Red Flags

The Truth About Implementation

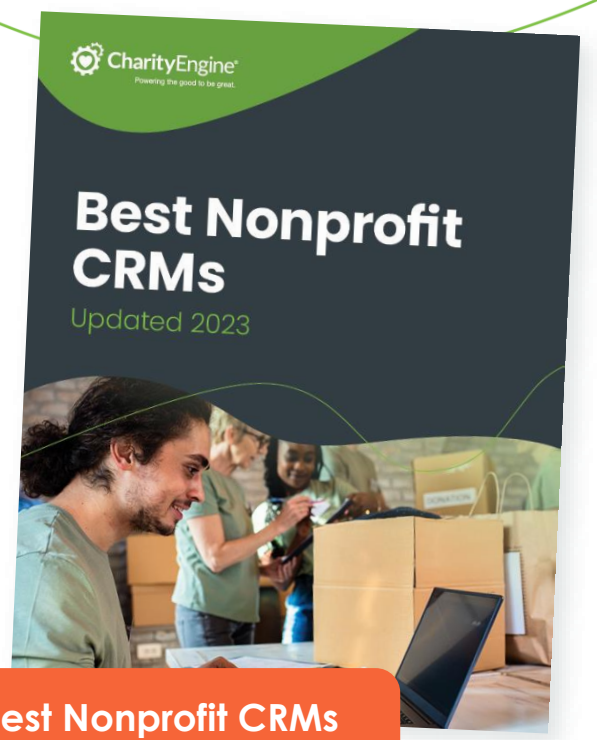
What is in Your Control?

- Data Hygiene
- Mapping Key Integrations
- What Else?



Ultimate Guide to Selecting a Nonprofit CRM

Nonprofit CRM Comparison Workbook



Best Nonprofit CRMs (Updated 2023)

Resources

Questions?

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Thank You!