

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Is my technology outdated or being sunsetted?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?



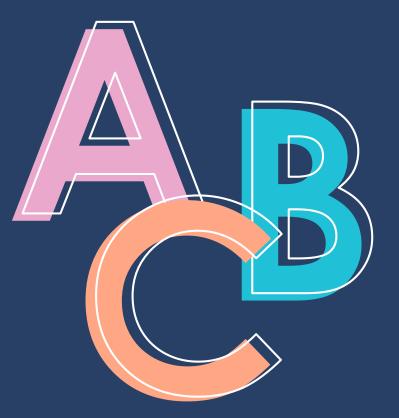
Are costs escalating?



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

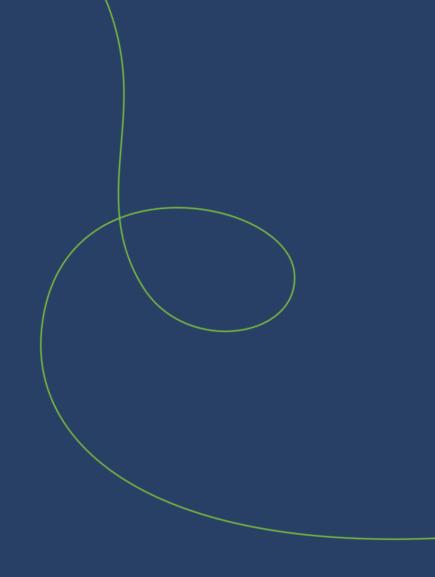


Identifying the **Best Tech for** Your Nonprofit It's As Easy As ABC...

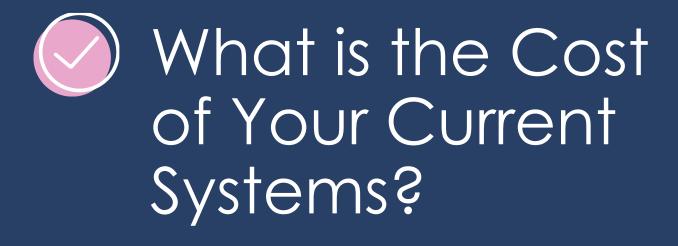


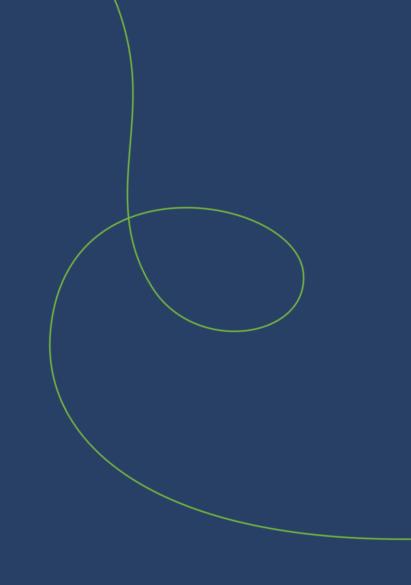








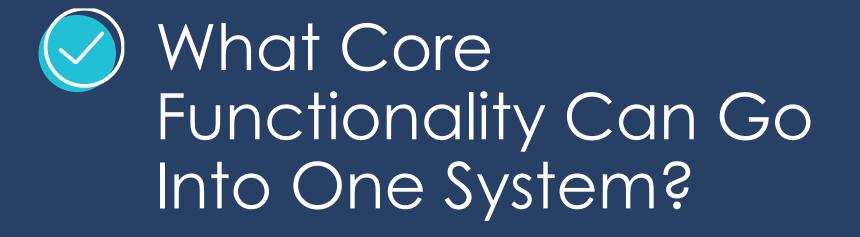








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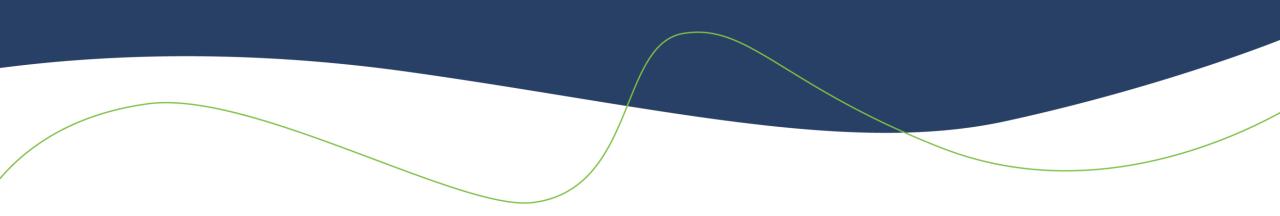






The Truth About Implementation





What is in Your Control?

- Data Hygiene
- Mapping Key Integrations
- What Else?



CharityEngine

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

	20
Ultimate Gu Selecting a Nor	

	Need Vendor 1
lequirements	the state of the s
RM/Donor Database	
eople, Organizations, and Households as Separate but Related Entities	· ·
ustomizable Activities (e.g. Meeting, Sent Email, Received Email, Follow Up)	and the second sec
ult-in Propensity to Give Algorithm (Al)	 CharityEngine
ustomizable Badges - (e.g. Board Member Major Doner, VIP) Inlimited Custom Fields	
rement & Query on Custom Fields	CRM Assessment Worksheet
intact Attribution Model for Lead Reporting (Initiative, Segment & Response Chennel)	
fulti-Channel Blobal Communication Preferences (mail, phone, email, sms)	How much does your CRM cost? What I you add in extras, like email automation? How about
stalled Logging of Global Communication Changes Complian: with Most Privacy Frameworks (e.g. GDPR, CCPA)	costs, like stall time or donors you lose because of technology or other reasons? Use this worksheet to calculate all the costs to have a complete picture of the money your nonprofit spe-
utomatically Detect Possible Duplicates with Easy Merge Options	on your CRM solution every month. There's room for you to list what you like and don't like, and
stalled Change Log for Any Record Changes (create, update, delete)	spot for you to create your cheam solution and see how commercial options stack up.
utomatically Sync User Emails and Contact Responses with Contact Record (including message content)	Update this worksheet as needed, and then you'll have all your information in one spot when it
utomatic System-Wide Email Inbox Verification to Protect Email Sender Reputation	time to think about a new system or staying with your current solution.
Isual Query Builder with Advanced Logic & Access to over 35,000 searchable data points	Step 1: Calculate Your Monthly Costs
stal For CRW/Dosor Database	
	Software and Tools Wonthly Cost Espirati
	Doror Management Software \$0.00
	Marketing Automation (Seleaforce Marketing Cloud, Eloque, Mar \$0.00 Events Nanapement \$0.00
	Peer-to-Rear 90.50 Auxions 90.50 Advoacy 50.00
	Advocacy \$0.00
	Text to Give and Blast Text \$0.00
	Payment Processing (i.e. PayPal, authorize.net) \$0.00
	Ecommerce \$0.00

CharityEngine*

Best Nonprofit CRMs

pdated 2023



Best Nonprofit CRMs (Updated 2023)

Resources

Questions?





Thank You!