



CharityEngine®

Powering the good to be great.

A No-Stress Guide to  
**Switching**  
**Nonprofit CRMs**





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# Introduction

Are you tired of your nonprofit's clunky and outdated CRM and siloed data, but the thought of switching to a new system fills you with dread?

We get it.

From migrating data to learning how to pull reports to the very real fear you'll lose information, the idea of implementing new software can leave you feeling defeated and frustrated before you even start shopping.

But it doesn't have to be like that!

CharityEngine has been around the CRM block, and we've helped hundreds of clients glide right through implementation as if it's as relaxing as a margarita on the beach.

(Okay, that's an exaggeration. It's not really relaxing, but we pinky-promise you that it can be easier than you think—and just about completely stress-free.)

We've got some pretty huge clients with some pretty huge databases, and we figure that if we could get them through no-stress implementations, we might have some tips to help any nonprofit wanting to switch CRMs.

So here we go!

In six chapters, we will walk you through the steps of a no-stress switch.

Get ready to **say goodbye to the headache of an outdated or inefficient CRM** and hello to the CRM of your dreams!

**CharityEngine has been around the CRM block, and we've helped hundreds of clients glide right through implementation as if it's as relaxing as a margarita on the beach.**



# 1 Getting Ready

Believe it or not, a stress-free switch starts with your nonprofit, long before you sign on the dotted line with a CRM vendor.

Have you heard of the saying, “**Garbage in, garbage out?**”

While that’s a little dramatic, it’s true that messy, incomplete, inconsistent data fed into the world’s best technology will still give you messy, incomplete, inconsistent results.

When we know there’s an impending CharityEngine implementation, we send the client a checklist of steps they can take to ensure the nonprofit’s data is in order.

[We’ve included a free copy of the checklist for you!](#)

Think about the incremental goals you can set. What might they look like?



## What are these magical steps?

### Let's break it down.

- ➔ **Assess your current tech stack.** Your goal is to have a complete map of your technology, so you'll want to consider questions such as:
  - How many data sources do you have? It's not unusual for clients to have donor data in a database, a payment processing system, email software, event software, and maybe even an Excel spreadsheet or two.
  - How much do these systems cost? We recommend you calculate these numbers as monthly costs so you can compare the monthly cost of a new CRM.
  - What is the function of each system? Perhaps you have two different systems that offer a database and email automation. Those can be consolidated.
  
- ➔ **Talk to your team.**
  - What are the platforms they need to do their jobs?
  - What are the biggest pain points for them with your current technology?
  - What's their level of technical expertise?
  - Explore their expectations for support.
  
- ➔ **Clean up that data!** Now's a great time to make sure your data is in good shape to maximize performance and reporting in a new CRM.
  - Begin with an audit. Which data fields are necessary? Collecting too much information can clutter your systems and lead to a lousy donor experience. Consider your data's "true north" – where are you sure your entries are accurate?
  - Think about standardization. If a donor is listed by her first name in one system and as half of a Mr. and Mrs. in another system, that's going to lead to inconsistent reporting. Before you can migrate data into standard fields, you must have consistent data on your end.
  - De-dupe your data. There are tools your CRM vendor can recommend to scrub your records clean!

Get rid of anything that's unnecessary. Ditch anything that's not essential to your success.



➔ **Knock down silos.** When there's a major gifts team with their database and a P2P team using another database, mistakes can happen. We've told the story before of a client with many disparate systems. Right after a donor made a sizeable donation, he received an email asking why he hadn't responded to a fundraising appeal for \$25. Everyone on your team needs to use the same technology!

➔ **Check out your infrastructure.**

- How's your connectivity? If you need to upgrade anything, now's a good time to do it.
- What about computers, phones, and laptops?
- And, of course, your team. Do you need to add a team member or shuffle responsibilities to ensure everyone is set up for success?

➔ **Organize your information.**

- Consolidate data sources so you have streamlined data.
- Categorize and quantify your records.
- Think of a data migration map. Which data sources will be migrated to the new system?
- Get rid of anything that's unnecessary. Think of it like you're moving to a new house... take what is useful and helpful and necessary, but ditch anything that's not essential to your success.

➔ **Set your goals.** How will you know if your new CRM was worth the switch? Set measurable goals. They could include:

- Increase in first-time donors
- Increase in sustainers
- Increase in total funds raised
- Increase in donor retention
- Fundraising or participation goals per event
- New outreach methods to try
- Increased engagement with emails
- Increased traffic to donation page
- Increased conversions



## You get the picture!

Measure anything that means success for your nonprofit.

But let's go a step further. Set goals for implementation. Paint a picture of what you want things to look like one week after implementation. One month. Three months. Think about the incremental goals you can set. What might they look like?

Your implementation goals might be that your staff feels fully trained and all your data is accessible. One month later, your support requests to the vendor have decreased by 20%. Three months later, you are launching your first fundraising campaign, and your goals can include some of those mentioned above, like conversions.

Set as many realistic goals as you can so you'll have KPIs you can measure to determine success.

Here are our **seven steps to take to ensure a nonprofit's data is in order**:

1. Assess your current tech stack.
2. Talk to your team.
3. Clean up that data!
4. Knock down silos.
5. Check out your infrastructure.
6. Organize your information.
7. Set your goals.



## 2 Finesse the Obstacles

While we can help make a technology changeover pretty easy, we'd be crazy if we told you there won't be any obstacles.

But, like the eternal optimists we are, we'd rather focus on how to overcome common obstacles.

It's a promise, and it's also kind of Murphy's Law. If you anticipate and mitigate problems before they happen, chances are it will be smooth sailing.

From the CharityEngine files, **here are some steps you can take that will truly allow you to finesse the obstacles.**

Go into it understanding that it's hard for most people to accept new software.



## Get Board Buy-In

We're talking about getting board buy-in from the very beginning! They need to approve the cost, understand the goals and how they will be measured, and [calculate the ROI](#) to understand how this investment will help your nonprofit make progress and fulfill its mission.

Some tips that might help you win over your board:

- ➔ **Tie your new technology into your nonprofit's overall goals and mission.** They're on the board to help change the world, so show them how the technology will help.
- ➔ You may be tech-savvy, but there might be someone on the board who isn't super tech-savvy and might not know his SaaS from his....never mind. Anyway, **lose the techy terms and describe functionality in terms of benefits.** If you choose a system that has robust reporting, talk about how easy it will be for the board to get information on the biggest donors or the percentage of lapsed donors.
- ➔ **Ask your vendor for some case studies.** If their website says clients increase fundraising by 900%, ask which client that was. Find real-world examples of how this software has changed the game for other nonprofits.
- ➔ **Nurture an early advocate or two.** If you have a couple of board members who are all in, that enthusiasm will be contagious.
- ➔ **Prove you've done your homework.** At CharityEngine, we offer [competitor research](#) so you can [compare CRMs](#) and see, at a glance, where we're strong and where someone else has us beat.
- ➔ **Ask the board members** what their biggest concerns are and prepare answers. Are they worried you'll lose data? Have your vendor explain to you why that won't happen so you can explain it to them. Are they worried about the learning curve? Talk about training.
- ➔ Get your vendor to **give the board a live demo.** Sometimes the ability to ask direct questions or have someone show you a spiffy tech trick again will be all you need.

Use your board! If you have a couple of board members who are all in, that enthusiasm will be contagious.



## Get Team Buy-In

You've wowed the board, but the team is where things get real. A significant goal of switching CRMs should be to make it easier for your team members to do their jobs.

Go into it understanding that **it's hard for most people to accept new software.**

There's a learning curve, so there's a slowdown in productivity, and there's usually frustration (unless you have extraordinarily zen team members).

A mistake we often see is that the board is happy and the decisionmaker is happy, but the staff has been kept in the dark and is now expected to love something that, frankly, makes them a little miserable.

Again leveraging our decades in this business, here we offer our best tips for keeping your team firmly on the side of the new CRM:

- ➔ **Communication.** Start with a survey, asking for honest feedback from your team. What systems do they use every day? What do they like about them? What do they not like about them?
- ➔ **Ask about their learning styles.** Do they want to be able to access an online library for training and support, or will they want to pick up the phone and talk to someone? Knowing this early will help you select a system that offers the options you need.
- ➔ **Put a lot of thought into training.** Different departments might use the technology slightly differently, so explore whether or not it's a good idea to offer department heads in-depth, specific training and let them train their teams. This is often helpful because it's a smaller group getting direct training. Having access to the vendor for questions and teaching the software to others will help them round out their understanding of the platform.
- ➔ **Open the complaint department.** Be willing to listen to frustrations and try to help solve the issues. Your vendor can be a terrific partner, because you both want this software to be the answer to your dreams.
- ➔ **Consider a fun launch.** Whether you pack the conference room with balloons or order cupcakes, some festivity will build contagious enthusiasm.
- ➔ **And keep all eyes on the prize.** New technology will make jobs easier and will make your nonprofit more successful, which should motivate even the most reluctant staff members.



## Double Check to Make Sure it's a Good Match

By now, you've asked your team several times what functionalities they need in a CRM. They've told you what they're worried about.

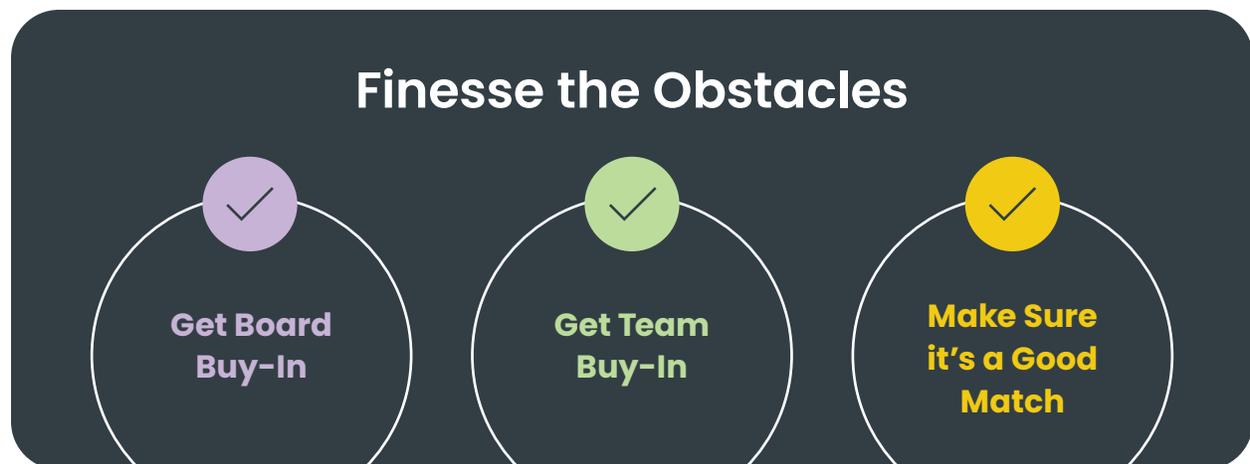
Give your vendor a call and run through all these comments to make sure the CRM and the vendor can accommodate the concerns. It may seem like overkill, but it's worth a 20-minute phone call.

Everyone on your team has chosen to work for your nonprofit, whether they're paid or volunteer staff. They want success as much as you do!

Ask your vendor if your team has access to a sandbox.

This is an environment in which you can play with the software, querying it and seeing dashboards. It's a good step, as is the live demo, as is the training the way people want to be trained.

With those measures and the assurance that all the functionality you need is there, you're promised smoother sailing.



# 3 Key Questions to Ask

We've shared how to get your internal house in order, getting your data ready for a big move and garnering the support of your board and your team. And, certainly, those are crucial steps.

But we would be remiss if we didn't cover some **insightful questions you can ask**.

If you haven't chosen your new vendor but you've narrowed it down to two or three choices, we recommend **asking these same questions of each vendor** so you can compare them apples-to-apples.

And then...**worksheet alert!**...we will share ten questions that we think will uncover often-hidden details that can help you make an educated decision.

If you use our [key questions worksheet](#), we've added in some scoring modules to help you grab total scores for comparison.



## Ten Questions to Ask Nonprofit CRM Vendors

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We are a bit wordy with these questions, just to give you more of a sense of what to ask. Our worksheet is more straightforward if you don't need the context.

1. Ask **which features are available out of the box** and which are custom or add-ons. It's important to understand the overall cost of the system, including hidden costs. Ask directly if the vendor charges for things like data migration, training, support, or upgrades.
2. What does **ongoing support** include at my subscription level? What is the response time? Do I have options of a video library, an online chat, a phone call?
3. What if I want to cancel early? Are there **cancellation fees** or is there any sort of arbitration process? How many clients cancel early? Why?
4. What **downtime** can you expect, both from the changeover and then moving forward? Does the system go down during upgrades?
5. What is the process for clients to **recommend upgrades**? If I have a great idea of how to improve the software, what's the path it takes from my brain to implementation?
6. Is there an **upgrade cost**? What is the upgrade schedule? What fuels your upgrades, and how do you stay abreast of market trends and growth?
7. Eventually, my nonprofit will be gigantic and I will need an enormous tech stack. How easily does your system **integrate with third-party systems**? Do you have robust APIs? Do I need to pay for them?
8. How long does **implementation** take? Really? Ask to speak to clients or the implementation team. What can make it go faster? What will slow it down?
9. How will the system **scale to your growth**? It's a world of mergers and acquisitions out there, and the ugly secret is that when a company is acquired, the acquiree often has support for their technology shut off. Ask anyone who loved Salsa; it's being sunset as we speak. Find a vendor who grows their technology organically, without buying other companies to patch holes.
10. What level of **technical expertise** does my team need to have? Can you train us to use the system as if we aren't super techy? You want plain talk, benefits-driven training that takes your team into account.

## Sorry to Say It, But Beware of a Few Red Flags

We don't love throwing shade on industry friends, but we also know nonprofits (as you might know, we go way way way back with giants like Wounded Warrior Project), and we are determined to be helpful and make it easier for nonprofits to change the world. So, we will throw up four red flags that we'd urge you to consider.



We already kind of said it, but mergers and acquisitions are rampant. They help nonprofits as they bring a lot of technology under one roof for one price. But the downfall is that you're a pawn in the game, and if they decide your system isn't a winner, they'll sunset it. **We hear daily from people frustrated that they're being forced into a new system** and looking for someone who doesn't have plans to merge with a conglomerate. Just sayin'.



**Lack of transparency** is more of a warning sign than you'd think. It might be a relief—"They've got it all under control and I don't have to lift a finger!"—but that's a flag. You're partners, both focused on the success of your nonprofit. Not only do you want to know what's going on, you also want them to ask what's going on with your team. Cookie-cutter, factory implementations aren't what we would want as a nonprofit. Personalized attention and care about our thoughts would matter more.



And speaking of that, **is this a sales team that promises you the moon?** Our sales team is awesome (they really are!) and will tell you the truth if our software can't walk and chew gum at the same time. Beware the over-the-top, super-aggressive salespeople that dismiss every question with, "Yup, we can do that." Spoiler alert: **they can't**. Ask for realistic answers, not the answers that will snow educated buyers.



And speaking of THAT, **how many times do they ask about your opinion or thoughts?** If there's no consideration to concerns or ideas, that speaks volumes. **That's not a partner**. If your team is nervous, you need to be able to share that (and mitigate it). If the system isn't working the way it's supposed to, you need a friendly voice on the phone. Don't dismiss warning signs that the company isn't tuned in to how you're feeling.

# 4 Kick the Security Tires

Doesn't it sometimes seem like there's a new data breach every week?

If you've ever given your credit card—or bank account information—to an organization that gets hacked, you know that feeling of dread as you wonder how you'll be affected. You will probably also recognize that slight feeling of distrust for that organization, because if they could get hacked once...

This is not the way you would ever want your donors to feel.

By your nonprofit's nature, you're asking people to trust you with financial transactions. Particularly in an industry that relies so much on goodwill, something happening to your donor data (financial or otherwise) could be disastrous.

As a payment processor, we are obsessed with [fraud prevention](#). In fact, our advanced fraud protection is 100% effective at protecting your nonprofit from the most sophisticated attacks.

Clients such as **Wounded Warrior Project** and **Army Emergency Relief** have credited our protection with securing their systems. This isn't a commercial for CharityEngine, though, it's more to show you how very seriously your nonprofit CRM vendor should think about security.

We can promise your CRM switch will be less stressful if you're going into it with the utmost confidence your donor data will be secure.



But exactly **how do you kick those tires?** What do you ask?

Knowing as much as we do about fraud prevention, this is what we'd recommend:

- ➔ First, does your CRM offer payment processing? If so, is it **native to the system**, or is it an integration with Stripe or PayPal or another payment processor?
- ➔ If it's native to the system or not, check on its PCI status. That's short for the Payment Card Industry, which sets standards for payment security. Vendors can be compliant, which is easy to achieve, or certified, which requires a rigorous process and comprehensive audit. If you can find a **PCI-certified payment processor**, you're in better shape.
- ➔ Ask your CRM vendor about its SOC 2 compliance or certification. This voluntary compliance standard for service organizations specifies how organizations should manage customer data. If PCI is about the safety of money, SOC 2 is about the safety of data. You'll have much less stress if you can find a **SOC 2 certified vendor**. Similar to PCI, certification is a big step above compliance.
- ➔ Consider your donor data as a cookie jar. You don't want a lot of germmy hands reaching into the jar, right? While we wouldn't call any company germmy, **we can suggest you ask how many hands are going to touch your financial data**. There's your CRM, your payment processor, and then a few more stops as it goes up the pyramid to the Federal Reserve. Everyone who touches it takes a fee, which means the more hands in the cookie jar, the less money in your nonprofit's bank account. It also means much more vulnerability to fraud. Dig deep and ask about the path a donation will take, and try to limit germmy hands. (That's probably good advice for almost anything.)
- ➔ Another hugely important question to ask is the vendor's **protocol** in the event of a security breach. You want to feel confident they would have control of the situation. If there's not a plan, that's a concern.
- ➔ Ask up front about the vendor's **security history**, or even Google it. If there's been a data breach, how was it handled? What measures were put in place to make sure it won't happen again?
- ➔ Finally, talk to the vendor about the security measures they have in place. Does the database require two-factor identification to log in? Is **fraud prevention software** included or is it an additional cost?

We get it. It's not fun to play "what if" and grill someone on what they'd do if disaster strikes.

But if you don't plan for it, you're ill-equipped to handle an emergency if it arises.

# 5 Master the Changeover

Change management is a whole industry...because change is hard. Knowing that, and preparing for it, will be one of the best ways to ensure a no-stress switch.

And if there's a key to mastering the changeover, it's really about being disciplined and organized. If you've got disciplined and organized covered, all you have to do is follow a few easy steps. And guess what? We'll share with you what they are!

But first, it makes sense to remind you of the overarching best practices for change management. There are five key ingredients for successful organizational change:

1. Define your **vision**—what do you want to achieve with the new software?
2. Focus on the **benefits**—how will this technology make your jobs easier?
3. Gain **support** from your board, your leadership, and your team.
4. Understand what training and support **resources** will be available to you from the CRM vendor.
5. Invest the time in creating a **plan** that will outline each step.



## Let's talk about that plan.

Here are some **easy steps you can follow to craft a strategic plan** that will check all the boxes so nothing falls through the cracks.

- ➔ Start with a list of your team members. Think of anyone who will use the CRM. Employees, yes, but what about volunteers? Board members?
- ➔ From this list, assemble a core team that will be responsible for the implementation.
- ➔ Consider every role that needs to be filled. Ask your vendor what roles they would like to have filled from your side. Here are some ideas:
  - Who will be the point of contact with the vendor?
  - Who will prepare the data for migration?
  - Who will manage the project and deadlines? That's your PM, or project manager, and it's an important role.
  - Who will be responsible for User Acceptance Testing? (If you're wondering what UAT is, it's an opportunity for you to get in the system and send an email or build a donation form. You're literally testing the functionality you need.)
  - Who will facilitate training and ensure it's adequate?
  - Who will spearhead a data governance policy to set standards for how data will be added to the new system?
- ➔ Have your PM create a schedule with the vendor. Insist on transparency and understand which deadlines you have to meet and when you can expect deadlines met from the vendor's team.
- ➔ Ensure your data is mapped, either to the new system or the cloud.
- ➔ Have a plan for issues that could come up when data is being transferred. How quickly could you create custom fields?
- ➔ Think back to all those siloed data sources. Ensure you have an understanding of how each will migrate data and ensure you know where that data is going to go.
- ➔ And don't forget about the extras, like your marketing or branding guidelines and assets. You'll want logos, templates, and brand guides moved over as well.

Remember that your vendor is your partner and should offer specific best practices based on their experience implementing the CRM for nonprofits.



# 6 Assess Again and Again

You've implemented your new CRM. No one is yelling in frustration, so the training went well. You're having a ball exploring all the cool new fundraising tools.

So you're done, right?

Nope.

Remember way back in chapter 1, where we recommended setting measurable goals for every stage?

That step was important so that you now have standards against which you can measure your CRM's performance.

How does this reduce stress?

It heads off problems to keep your engagement benefitting your nonprofit. We send surveys to our clients more often than they'd probably like to receive them, just because we want feedback to be certain the software is working well for them.



## Let's take a look at a few steps in the lifetime of a CRM contract.

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For each, we'll suggest some questions that will help you measure your success.

### ➔ After Implementation

- Do you feel as though your team was properly trained and onboarded?
- Can everyone access the functionality to do their jobs?
- Is all of your data mapped to the proper places?
- How much downtime has your donation page had?
- Is support available, and do you and your team know how to access it?
- Are all integrations working well?
- Does your team seem happy?
- Have you reduced or eliminated data silos?

### ➔ Three Months Later

- Is support still available and helpful?
- Has everything continued to run without interruption?
- Has the change been seamless to your donors?
- Is your team comfortable accessing data?
- Can you easily run reports that give you insights?
- Does the technology use AI, or artificial intelligence? These days, this tells you how they're keeping up with technology.
- How is the technology evolving? Through customer suggestions and native tools or by buying a new company?

### ➔ Six Months Later

- Do you have a line to offer feedback or product suggestions?
- Has the support continued? And have you needed less of it?
- Have you launched a fundraising campaign?
- Have you developed a plan for fundraising using your new CRM?



### ➔ **A Year Later (and every time the contract is up for renewal)**

- Have the KPIs you set been met? This is, perhaps, the most crucial question of all. Are you growing?
- Does the system seem to be secure? Have there been any data scares?
- Is this system making donor management and fundraising easier?
- Do I feel confident the company is going to continue to support the software?
- Is there refresher training available for my team?
- Is this system living up to what was promised?
- Do I like the people at the company? Do they seem to care about us? Do they listen and support us?

It may seem silly, this constant assessing, but we can let you in on a little industry secret: what our technology is capable of is shifting and growing daily.

As soon as you settle into one system, there's another with a product update that would knock your socks off.

There's [AI and Chat GPT](#) and advances in reporting AND advances in fraud so you have to be protected and now there's a new tool you can use for donor retention....

You don't have to worry about keeping up with technological advances and industry growth if you have confidence that your CRM vendor is on it.

We had a client, a gentleman from **Help Heal Veterans**, offer a testimonial video in which he said, "This company is always innovating. If I hear about some cool new feature coming online soon for a competitor's technology, CharityEngine already has a prototype in beta testing."

That makes our **nerdy hearts happy**, because it proves that our clients enjoy the shiniest, newest tech features right in our CRM.



## Nonprofit CRM Changes Don't Have to Stink

As you have read, there are so many things you, the nonprofit, can do to make sure the process is stress-free and stink-less.

Then, along the way, there are a lot of questions you can ask and processes you can implement to ensure a seamless changeover.

At the heart of KPIs, checklists, questions, and plans is your mission.

Going out on a limb, we can confidently say your mission is extraordinarily important. All the steps are just so that you can be certain you're engaging with and nurturing your donors and raising as much money as you can for that mission.

If you can have fun along the way, with a raucous auction or inspiring peer-to-peer 5K event, you've chosen your software well.

If that awesome software comes with awesome human beings that care about your mission and how their software is working for you, you've hit the proverbial home run.

And it's a safe bet you're not too stressed.

If this guide has been helpful to you, or if you are interested in hearing about how our awesome software comes with awesome people, [let us know](#).

Otherwise, our wish for you is that your next CRM switch is almost as relaxing as that margarita on the beach.

**You don't have to worry about keeping up with technological advances and industry growth if you have confidence that your CRM vendor is on it.**



# Are you ready to see CharityEngine in action?

Discover how CharityEngine's unique all-in-one solution will kickstart your multi-channel fundraising campaign.

[Request a Demo](#)



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Powering the good to be great.

