

How to find the BEST Fundraising Solution

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What We'll Cover

1. Introductions
2. Today's software landscape
3. What's the best?
4. Self-Assessment
5. Bonus: Be a Better Buyer

Who the HECK Are We?



Co-Founder



www.raiseheck.com



Co-Founder



www.raiseheck.com



Today's CRM Landscape



What's the best one?

It depends.

Great, thanks.

On what?

It Depends On

1. Your existing tech stack
2. Your mix of fundraising programs
3. Your goals for growth
4. The size of your revenue streams
5. **How well your people are using it!**

Figuring all of this out is called...

A Self-Assessment

Self-Assessment

There are all kinds of assessments, but we're talking about two specific types:

1. **Technical assessment**
2. **People assessment**

When you've completed your self-assessment, you'll have a better idea of how well your current tech is serving your organization and your people.



You Need Information

You'll be collecting a lot of information.

→ Interviews, Surveys, and more.

This information can take many forms.

→ Interviews: notes/narrative

→ Surveys: numbers, values, long and short answers.

Your Final Product

You'll synthesize this information into a final report

→ You'll include narrative, discussion, graphs, and charts.

This report will be a document that takes a snapshot of a moment in time.

→ Update it periodically

→ You can use it to create a technology roadmap for your nonprofit

You might also make slides!

Self-Assessment: Tech Stack

1. **Inventory** of what we're using right now
2. What are **others** in the organization using?
3. How do we **integrate** our data?
4. What does our **IT department** support?
5. Is there an organizational **CRM**?
6. What's the **backbone** of our organizational systems?



A great stack

Tech Stack: Why is it important to know?

Fundraising is more effective when you can leverage all the data about your donors and prospects.

Can your solution **easily consume and use data from other programs'** solutions?

IT can help you share data more easily if your solution fits into the organizational ecosystem.



Self-Assessment: Mix of Fundraising Programs

How do we raise our money?

1. Direct Marketing
2. Major Gift Fundraising
3. Grants
4. Planned Giving
5. Events
6. Peer-to-Peer Fundraising
7. Membership/Dues
8. Corporate Sponsorship
9. Capital Campaign

DONATE NOW

Self-Assessment: Revenue Streams

How much do each of these programs raise?

We need to make sure that we prioritize support for our largest and most dependable revenue streams, while still making room for new stuff.



Self-Assessment: Goals for Growth

What are our goals for growth?

1. Do we want to bolster our major donor program?
2. Are we growing our direct marketing efforts?
3. Are we ramping up our corporate sponsorships?
4. Should we increase our number of gala events?
5. Do we want to implement a texting program?
6. Are we prioritizing our peer-to-peer fundraising?



Requirements,
Priorities, Gaps

Self-Assessment: People

Assessing your people is all about 6 things



If you don't answer these questions you get this:



Self-Assessment: People and Existing Tech

Who, What, Where, When, Why, How

1. **Who** is using our systems?
2. **What** does each person do?

Org Chart and Job Responsibilities

3. **Where** do people get help?
4. **When** new people join, how are they trained?

Documentation and Onboarding

5. **Why** do we use these systems?
6. **How** does our tech fit in?

Big Picture and Buy-In

Self-Assessment: People and Changing Tech

Who, What, Where, When, Why, How

1. **Who** will be affected?
2. **What** is changing?
3. **Where** is this documented?
4. **When** will the change happen?
5. **Why** are we changing?
6. **How** will we train people?

If you're changing tech, this part is the **most important**.

People who are bought in will **help the project succeed**.

People who are resistant can **grind projects to a halt**.

Why Bother Doing All of This?

You'll know what **features and capabilities** your system has and if there are gaps.

You'll have a better understanding of whether your **organization** is being well-served.

You'll have some idea of whether your **people** are working well with the system.



Bonus: Be a Better Buyer

Keep This in Mind

When you buy software, you're not just buying code and features.

- You're buying a **relationship** with the people who determine the company's strategy and business decisions
- You're buying the company's **services and support teams**
- You're buying into a **community of users**

You're also buying something that your people will need to use.

The success of any software depends on people.

Be a Better Buyer

1. **Narrow down and prioritize** your requirements
2. Send your requirements to vendors **before the demo**
3. **Be transparent** about your budget with vendors
4. Ask to see your **specific use cases** demonstrated
5. **Check references** and read reviews
6. Understand the **company and the people** too
7. **Inform vendors** when you've made your decision (even if you didn't select them)



Q&A