
Ditch the
Software
Headache: How
Smart
Nonprofits
Choose Better
Tech

Sage 70





CharityEngine was built for nonprofits.

- All-in-One Nonprofit CRM
- Data and Tools in One Place
- One Scalable Platform to Learn
- 100% privately owned and self-funded





What Does Sage70 Deliver?

Clarity.

From stakeholder alignment to people strategy to system selection, we find the path forward and guide you through it.

Sage 70



Isaac Shalev President, Sage70, Inc.

- Over 15 years of experience working with Data, CRM, and Strategy
- My Mission: Put data and technology to work for nonprofits
- Active volunteer, teacher, and community member at aasp, NTEN, Techsoup, CASE, and others
- I design board games!
- My headshot doesn't age...

Start With Users

- Get buy-in from *users*
- Don't delay
- Other stakeholders matter, too
- But start with users, they will remember that you did





Work With A Team

- Representation from all levels and affected functional areas
- IT, Advancement Services, Finance, etc. get a vote, but not a veto
- Involve neutral and respected staff members who can prioritize the good of the organization
- Pick a team leader and get an executive sponsor

Why?

- Why are you looking for a new system?
- What will be better than before?
- What does success look like?
- Consider hiring an assessment expert



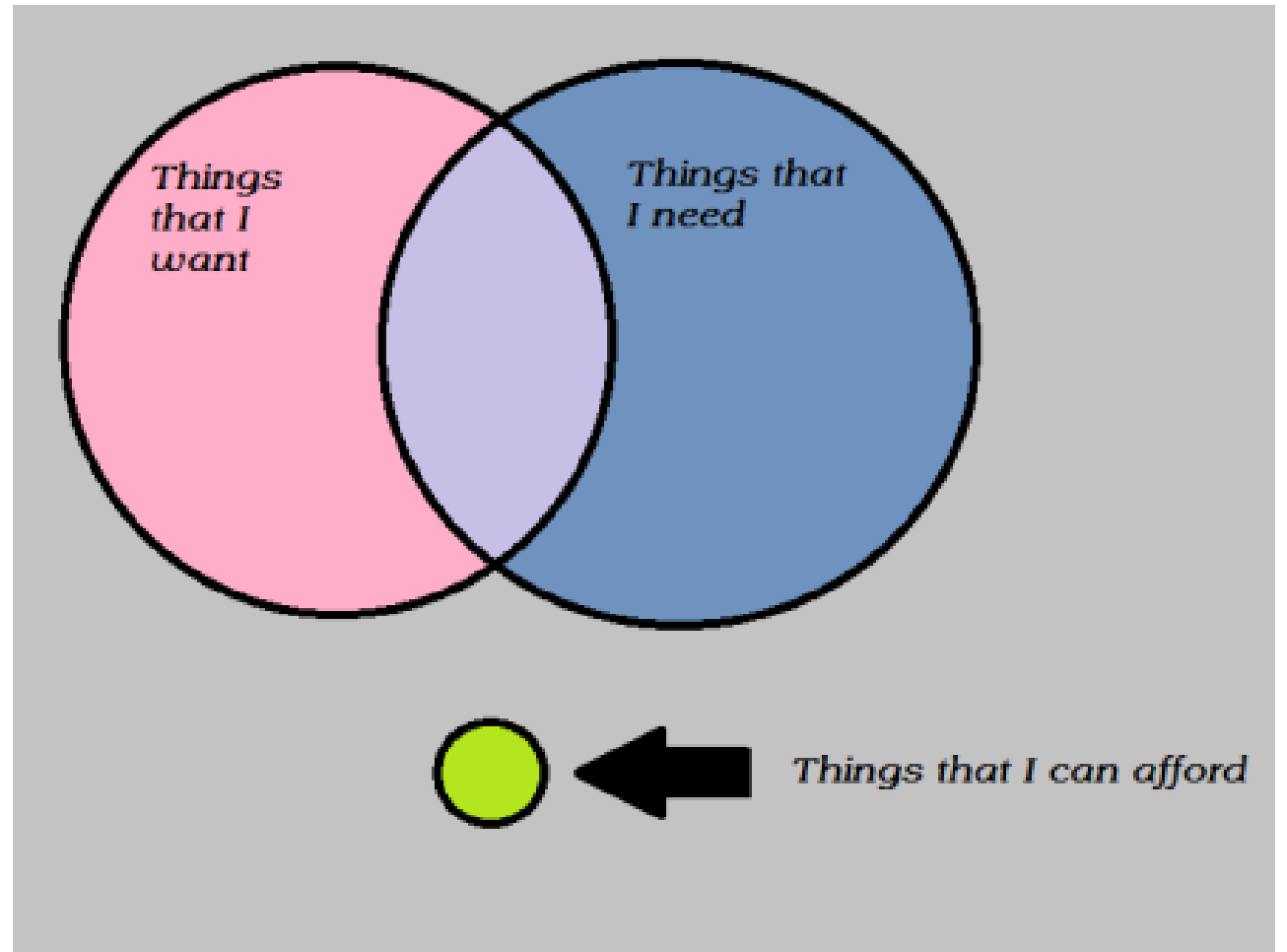
A man in a dark suit, white shirt, and red patterned tie is holding a glowing white orb with both hands. The background is dark blue with a subtle pattern. The orb is the central focus, emitting a bright light.

Needs Assessment

- Anticipate Future Needs
- Start with the big picture
 - What can you afford?
 - Risk-averse, or early adopter?
 - Adapt your processes, or customize your software?
 - Limitations – hardware, environment, security, etc.
 - Integrations
 - Staff roles

Needs Assessment

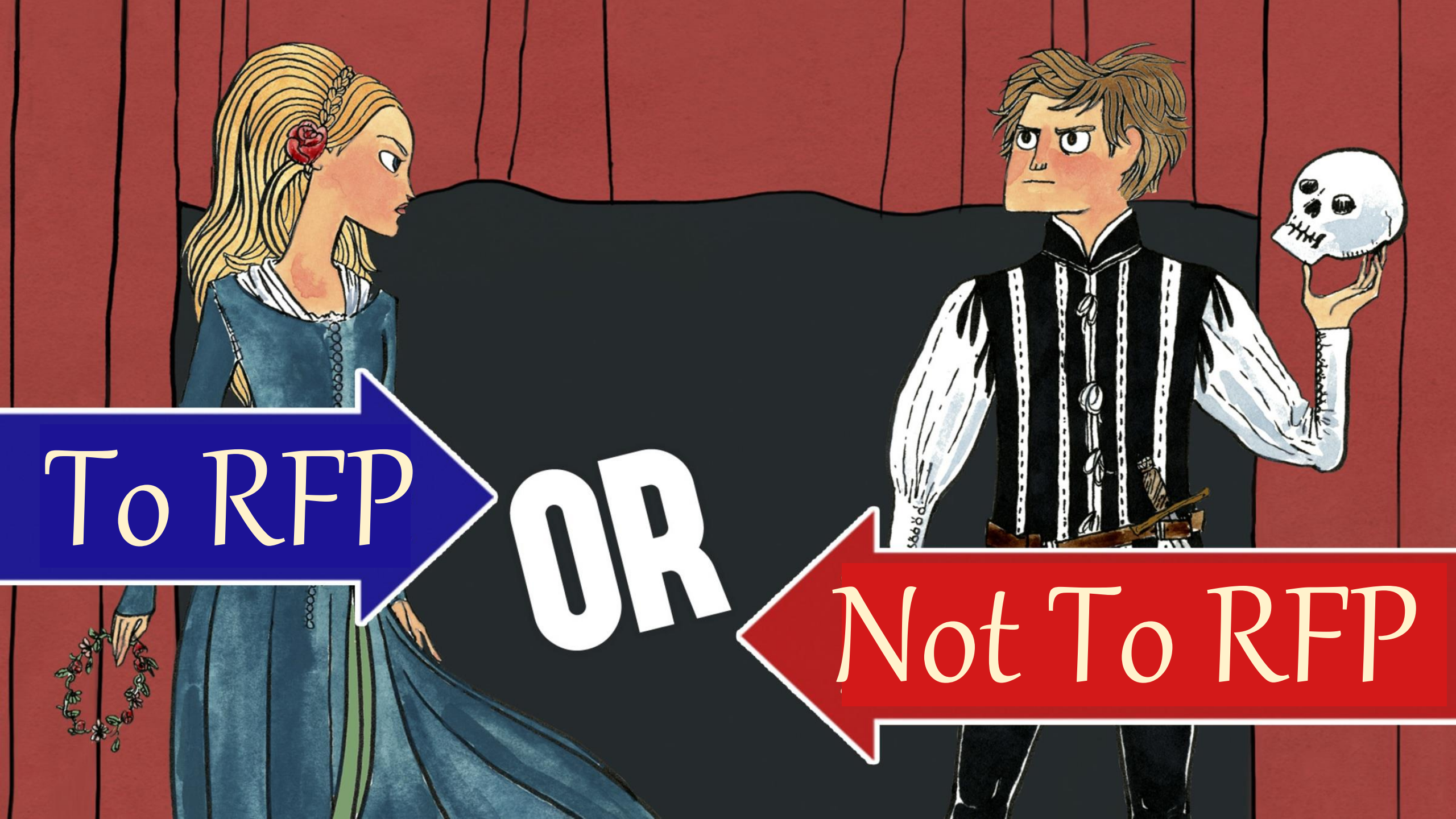
- Surface all of the requirements
- Focus on the 10% that are actually required
- Rating requirements on a scale from 1-10 can help



vendor

- Ask other organizations
- Trade show booths
- Online demos
- aasp resources





To RFP

OR

Not To RFP

RFX – Request For... help!

RFP

Winnow a large vendor list

Promote fairness and limit bias

Legal recourse

Compliance with regulations

Rigid, can rule out good options or discourage some proposals

RFI / RFQ / RFO

Much easier to create the document and manage the process

Invites dialog with the vendor

Lowers the emphasis on price

Does not require you to self-diagnose

Ask the Hard Questions

- Concrete, unambiguous, factual
- Focus on your mandatory requirements
- “Can you accept Euros?”
- “Are data entry screens customizable by user role?”
- Usability, how easy it is to perform a function, is not easy to learn from an RFP process



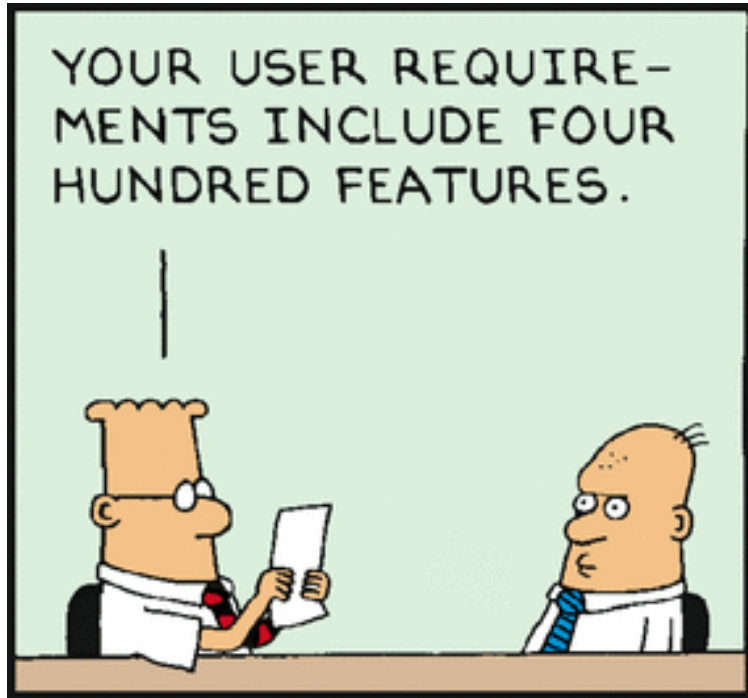


Prove It

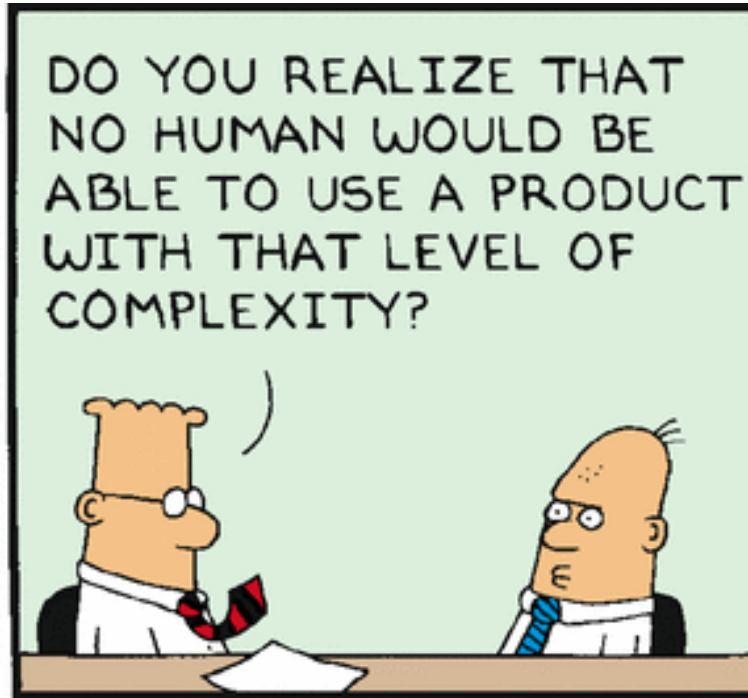
- No more than four vendors
- Demand in-depth demos
- Script the demo to identify the processes and features you want to see
- Invite people beyond the selection team
- Reserve 3-4 hours!

User Testing

- Selection team writes test cases
- Identify cases that are cumbersome to cover in a demo
- Take notes and debrief



www.dilbert.com scottadams@aol.com



4/14/01 © 2001 United Feature Syndicate, Inc.





Prove It: The ReProvening

- Check references!
- Ask at aasp and other online networks
- Visit other client sites, especially for enterprise-class systems

Stacking Up the Options

- Weight total cost of ownership
- Consider impacts and necessary upgrades to other systems
- Match your staffing to your system
- Evaluate implementation costs and options



Decide, and Document

- Why did you choose this system?
- How did the selection proceed?
- Who was involved?
- Express gratitude (not just in the document!) to everyone involved



Party Time!



Questions?

Sage 70

Isaac Shalev | isaac@sage70.com |
www.sage70.com

