



# Choosing a CRM

Nicole Aebi-Moyo  
Simply Solutions

CRM – what's that then?

# Some examples

- ▶ Raisers Edge
- ▶ iMIS
- ▶ Salesforce
- ▶ Microsoft CRM
- ▶ CiviCRM
- ▶ Sugar
- ▶ And so on.....hundreds of “CRMs” out there

# Define Your Requirements

- ▶ What do you want your CRM to do?
- ▶ How many users will there be?
- ▶ What else does it need to integrate with in your office – website, finance packages, email marketing tools, etc.
- ▶ What IT infrastructure do you have to support it or do you want to use a “cloud” solution?
- ▶ What’s your budget?
- ▶ What’s your timeframe?

# Go out to tender

- ▶ Ask your peers for recommendations
- ▶ Spread your net wide – at least 5 different companies/developers
- ▶ Interview and ask for demonstrations
- ▶ Get references and go meet with people they've worked with
- ▶ Choose your developer

# Critical things to check

- ▶ What IT do you need to run the CRM?
- ▶ What training will be provided?
- ▶ How will they manage the project?
- ▶ Is the price quoted an estimate or fixed?
- ▶ What support is offered and how much is it?
- ▶ What modifications will you be able to do post-implementation?
- ▶ What about upgrades?
- ▶ What ideas have they come up with?
- ▶ What other non-profits have they worked with?

# Managing your project

- ▶ Communicate
- ▶ Involve people
- ▶ Set aside enough resources – make it a priority
- ▶ Listen

# Raisers Edge

- ▶ Probably number 1 for fundraising
- ▶ American
- ▶ Can set up processes for staff to follow
- ▶ Modular: events, volunteer management, membership
- ▶ Approx \$1–2000 per year, per user
- ▶ Development: ???



|                 |                                 |                        |                        |
|-----------------|---------------------------------|------------------------|------------------------|
| iving Thank You | Direct Mailing                  | Address Address Lines  | 7930 Baker Street      |
| iving Thank You | CCEA108                         | Address City           | McMinnville            |
| iving Thank You | Internet/Web Site solicitations | Address State          | OR                     |
| iving Thank You | Special Event                   | Address ZIP            | 97128                  |
| iving Thank You | Radio                           | Address Phone type1    | E-Mail                 |
| iving Thank You | Annual Newsletter               | Address Phone number1  | cmiller@yahoo.com      |
| iving Thank You | Direct Mailing                  | Constituent Code Code1 | Friend                 |
| iving Thank You | Special Event                   | Primary Addressee      | Mrs. Cynthia T. Miller |
| iving Thank You | Direct Mailing                  | Primary Salutation     | Mrs. Miller            |
|                 |                                 | Solicit Code1          | Email Newsletter       |



TheRaiser'sEdge®



Data Entry Screen >>



Alice's homepage >>

|    |                                    |   |          |
|----|------------------------------------|---|----------|
| 9  | <a href="#">Isabelle G. Matley</a> | 1 | \$150.00 |
| 10 | <a href="#">Audrey J. Lorenz</a>   | 2 | \$100.00 |

| Campaign | Goal |
|----------|------|
|----------|------|

Call List - Gifts This Month over \$100

As of 11/15/2005 11:35:56 AM

| Gift Date                  | Constituent Name                  | Amount     | Constituent Code  | Fund       |
|----------------------------|-----------------------------------|------------|-------------------|------------|
| <a href="#">11/15/2005</a> | <a href="#">Cynthia T. Miller</a> | \$250.00   | Donor             | 2005ANNUAL |
| <a href="#">11/15/2005</a> | <a href="#">Winston R. Tate</a>   | \$1,500.00 | Prospective Donor | 2005ANNUAL |
| <a href="#">11/15/2005</a> | <a href="#">Scarlett K. Ray</a>   | \$1,000.00 | Prospective Donor | Library    |
| <a href="#">11/15/2005</a> | <a href="#">Scarlett K. Ray</a>   | \$650.00   | Prospective Donor | GARDEN     |
| <a href="#">11/12/2005</a> | <a href="#">Carl Rhodes</a>       | \$5,000.00 | Prospective Donor | Library    |
|                            |                                   | \$8,400.00 |                   |            |

Pipeline

As of 11/15/2005 11:34:55 AM

| Solicitor Name                     | Accepted | Active | C |
|------------------------------------|----------|--------|---|
| <a href="#">Alison E. Andrews</a>  |          | 2      |   |
| <a href="#">Kathleen R. Bently</a> |          | 1      |   |
| <a href="#">Angela Directa</a>     |          |        |   |
| <a href="#">Earl N. Hunter</a>     |          |        |   |
| <a href="#">Spencer Kovalak</a>    |          |        |   |
| <a href="#">Audrey J. Lorenz</a>   |          | 1      |   |
| <a href="#">Isabelle G. Matley</a> |          |        |   |
| <a href="#">Cynthia T. Miller</a>  |          |        |   |

Welcome to The Raiser's Edge 7

TheRaiser'sEdge®



# Automatic Task List >>>

Donations > \$100



Mail merge thank you letter >>

# iMIS

- ▶ 3000 non-profit organisations world-wide
- ▶ Membership, email marketing, website maintenance, ecommerce
- ▶ American
- ▶ iExtend modules/applications
- ▶ Approx: \$50,000 entry level inc licenses and development

## Contacts

- Contacts
- Manage contacts
- Manage committees
- Manage chapter rosters
- View activity tasks
- Manage Accumail
- Manage duplicates
- Generate reports
- Import activities
- IQA
- Set up tables
- Set up module
- Set up fundraising
- Customers help

ID 10000 Member Active Individual

Prefix: Chris M Suffix: Baker  
Designation: President

Company: Opus, Inc. (CM)  
193 333 N Michigan Ave, Chicago, IL 60601-3901  
Opus, Inc. OPUS, INC.

Work Address Home Address P.O. Box Seasonal

Address: 107 W Jefferson Ave  
Verify Address: Address 2 Status  
Address 3  
Wheaton IL 60187-4110  
Country

Preferred:  Mail  Bill  Ship  
Phone: (708) 298-2872 Fax:   
E-mail: cbaker@imisdemo.com

Overview Picture Demographics Notes Status Financial Other

Communications Pref: Email  
eNewsletter:  Exclude from Dir:   
Cell phone: (312) 443-9872 Email: cbaker@imisdemo.com  
Home: (708) 298-2872 Work: (312) 333-445  
Website: www.opusius.com Chapter: Travis County  
Join Date: 3/1/1992 Expires: 8/31/2008  
Functional Title: Chief Executive Officer  
US Congress District: 06  
Last Updated: 11/5/2007 3:25:02 PM Updated By: MANAGER  
Alerts: Notes-

Results Activities-All Calls Letters Roster Relationships Billing Events Orders Fundraising AR/Cash Change Log Record Histc

Opus, Inc., CM, Chicago, IL

- Chris Baker, President, Opus, Inc., M, Wheaton, IL
- Steve Carlson, Opus, Inc., M, Chicago, IL
- Tawanda Philips, Director of Information Services, Opus, Inc., M, Chicago, IL
- Pat Quarrels, Opus, Inc., M, Chicago, IL
- Ms. Susie Quinn, Opus, Inc., D, Chicago, IL
- Mr. John Tan, Vice President for Finance, Opus, Inc., NM, Chicago, IL
- V.D. Baker, Opus, Inc., M, Chicago, IL

10 record(s) displayed

Main data page >>

Go Back to Mailings

Save Changes

Update

Update & Test

Add from Content Mgr

## GEO International

Order: 10001



Name: Cali, contacts who gave in 2007 (used in table of contents, leave blank to omit)

Target:

Step 1

Compound

Step 2

California contacts who gave in 2007

Matching

### About GEO International



GEO International (GEO) is very fortunate to have a wonderful donor from California who gave last year. Thank you Mr. %% Last Name%%. We appreciate your donation!

GEO provides individuals and organizations worldwide with the knowledge, skills, and tools to achieve performance excellence, adapt to changing realities, and prosper in a complex and competitive world. GEO has earned the reputation as a trusted partner in worldwide professional development and management education that improves the immediate

Order: 10002



Name: Online Dues Renewal (used in table of contents, leave blank to omit)

Email marketing >>

Website

GEO 15

GEO Portal Tools

- GEO Site Maps
- URL Manager
- Image Manager
- UDF Manager
- Publishing Servers
- Surf to Edit
- Security Settings
- Site Search

Content Folders

Tagging

Workflow Groups

Task List

Logout

|     |                    |        |
|-----|--------------------|--------|
| 1.  | About              |        |
| 7.  | Member Services    |        |
| 8.  | Content Area 1     | HIDDEN |
| 9.  | Content Area 2     | HIDDEN |
| 10. | Content Area 3     | HIDDEN |
| 11. | Content Area 4     | HIDDEN |
| 12. | Content Area 5     | HIDDEN |
| 13. | Account Details    |        |
| 14. | Personal           |        |
| 15. | Address            |        |
| 16. | About me           |        |
| 17. | Order History      |        |
| 18. | Activities         | HIDDEN |
| 19. | Billing            |        |
| 20. | Manage Logon       |        |
| 21. | Directory          |        |
| 22. | Committees         |        |
| 23. | Create New Account |        |
| 24. | Resource Center    |        |
| 32. | Events             |        |
| 42. | Education          |        |

Website management >>





[Home](#) — [Member Services](#) — [Account Details](#) — [Billing](#)

## Pay your membership and subscriptions

### [Hide Paid Dues](#)

| Dues                  | Paid                                | Amount | Select                              |
|-----------------------|-------------------------------------|--------|-------------------------------------|
| Basic Membership Dues | <input checked="" type="checkbox"/> | 70.00  | <input checked="" type="checkbox"/> |
| Travis County         | <input checked="" type="checkbox"/> | 20.00  | <input checked="" type="checkbox"/> |

| Voluntary Dues   | Paid                     | Amount | Select                   |
|------------------|--------------------------|--------|--------------------------|
| PAC Contribution | <input type="checkbox"/> | 20.00  | <input type="checkbox"/> |

| Subscriptions        | Paid                     | Amount | Select                   |
|----------------------|--------------------------|--------|--------------------------|
| Journal Subscription | <input type="checkbox"/> | 65.00  | <input type="checkbox"/> |

Dues Total: 90.00

Section Dues Total: 0.00

### Member Services

#### Account Details

- Personal
- Address
- About me
- Order History

#### Billing

Manage Logon

#### Directory

#### Committees

#### Create New Account

Online payments >>

# Salesforce

- ▶ Managed by Salesforce foundation
- ▶ Over 7000 organisations using it worldwide
- ▶ Can be used for anything
- ▶ Cloud computing so no infrastructure costs
- ▶ 10 free licenses to any non-profit (including support)
- ▶ 80% discount for additional licenses, approx \$400 a year per user
- ▶ Development: from \$3000

Double | Cookies | CSS | Forms | Images | Information | Miscellaneous | Outlook | Ruler | Tools | View Source | Options  
 Norton | Norton Protection | Norton Security | Log In

force.com | 100 | Setup | System Log | Help & Training | Logout | force.com | Log Out

Home | Home | Organization | Contacts | Contacts and Team | Groups | Membership Payments | VR Tools | VR Dashboard | Reports

**LGSO** | Chair of London Gay Symphony Orchestra | Tuesday, 20 December 2011 | Discover Winter 2011

**Dashboard** | Refresh | Customize Page

As at 20/12/2011 10:10

**Opened Emails**

Sum of Sent Quantities

VR Email History Contact: Email Name

**Current Members**

Record Count (thousands)

Team Section

**My Tasks** | View | Load

Recent Items:
 

- Headline Region
- London Gay
- London Gay
- London Gay

Salesforce for the LGSO >>

[Norton](#) | [Showing Protection on](#) | [Inventory Info](#) | [Log In](#) | [Setup](#) | [System Log](#) | [Help & Training](#) | [Logout](#)

[force.com](#) | [LGSO](#)

[Home](#) | [Users](#) | [Organization](#) | [Contacts](#) | [Concerts and Tours](#) | [Google Docs](#) | [Membership Payments](#) | [VR Tools](#) | [VR Site clone](#) | [Reports](#)

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**Concert and Tour**  
**Mozart's Requiem**
Printable View | Customer View | Edit Contact | Add Contact View

[View Mozart's Requiem](#) | [View Mozart's Requiem](#) | [View Mozart's Requiem](#) | [View Mozart's Requiem](#) | [View Mozart's Requiem](#)

**Concert and Tour Detail**

[Edit](#) | [Delete](#) | [Clone](#) | [Manage Members](#) | [Advanced Setup](#)

|                         |                  |         |           |
|-------------------------|------------------|---------|-----------|
| Concert and Tour Owner: | Chris (Change)   | Status: | Completed |
| Concert and Tour Name:  | Mozart's Requiem | Active: | ✓         |
| Type:                   | Concert          |         |           |

**Event Details**

|             |                       |              |  |
|-------------|-----------------------|--------------|--|
| Venue:      | 114 Main St. Portland | Description: | With 100 members and 10000 in attendance. Organized by Food Chain. |
| Start Date: | 01/12/2008            | Separator:   | Mozart's Requiem   |
| End Date:   | 01/12/2008            |              |  |

**Planning**

**Statistics**

|                  |                        |                                |                        |
|------------------|------------------------|--------------------------------|------------------------|
| Total Responses: | 24                     | Num Total Opportunities:       | 11                     |
| Total Leads:     | 11                     | Sum Won Opportunities:         | 11                     |
| Converted Leads: | 11                     | Total Value Opportunities:     | 10                     |
| Total Contacts:  | 24                     | Total Value Won Opportunities: | 10                     |
| Created By:      | Chris, 1/12/2008 11:59 | Last Modified By:              | Chris, 1/12/2008 11:10 |

**Custom Links**

[View all Completed Members](#)

**Messages and alerts**

**Welcome to LGSO!**

**Recent Items**

- [Mozart's Requiem](#)
- [Mozart's Requiem](#)
- [Mozart's Requiem](#)
- [Mozart's Requiem](#)

Managing concerts >>>

The screenshot shows a web browser window displaying the force.com interface. The browser's address bar shows 'force.com' and the user is logged in as 'google@lgso.org.uk'. The interface includes a navigation menu with options like 'Home', 'Sales', 'Organization', 'Contacts', 'Accounts and Teams', 'Google Docs', 'Membership Payments', 'VR Tools', 'VR Dashboard', and 'Reports'. A search bar is visible with 'Search Docs' and 'Search Templates' buttons. The main content area is titled 'All Items' and displays a list of Google Docs files. The files are organized into folders: 'EARLIER THIS YEAR' and 'OLDER'. The list includes files such as 'Orchestra hand over notes', 'People offering summation to RSC', 'sponsors and advertizers', 'Budget for fundraising', 'Comp Tickets for Word', 'VP list for November 2008', 'pans group', 'Database instruction manual', 'LGSO 2 page case', 'LGSO 1 of 1 case', '2008-11-09 LGSO Committee Meeting Minutes v1', '2008-10-10 LGSO Committee Meeting Minutes v1', and 'RSC release schedule.pdf'. Each file entry shows its name, sharing status (e.g., 'Not shared'), and a date. The bottom of the page contains a copyright notice: 'Copyright © 2010-2011 salesforce.com, inc. All rights reserved. | Privacy Statement | Contact Us | Terms of Use | API Compliance'.

Google Docs from within Salesforce >>

# Microsoft CRM

- ▶ Need specific infrastructure to run – server and software
- ▶ Can be customised and integrated with a range of other software (eg telephony, finance packages, CMS)
- ▶ Licenses available through DonorTec
- ▶ Approx: \$2000 for software (depending on number of users).
- ▶ Development: ???

# Open Source options

- ▶ CiviCRM
- ▶ Sugar
- ▶ And others...