CHOOSING THE RIGHT CRM:

QUICK GUIDE + REQUIREMENTS CHECKLIST

Tick 'research what we need from a CRM' off your charity to-do-list.

Here's the key questions to ask yourself - and potential CRM providers - to pinpoint your CRM must-haves and streamline your decision-making.

Understanding Your Needs

SCOPING THE PROJECT

Before you start evaluating CRMs, define the scope of your project. Determine who needs to be involved and what functionalities are non-negotiable. *Involving all stakeholders from the start really is essential.* A collaborative approach ensures the system meets the diverse needs of everyone who will use it.

- **Stakeholder Mapping:** Get your team together to map out all potential stakeholders. This ensures nobody is overlooked and promotes buy-in from everyone involved.
- **Current Systems Audit:** Understanding where your data is currently stored (spreadsheets, another CRM, tools like MailChimp) and your data processes is crucial. Take time to identify what works, what doesn't and what needs to be upgraded.

i Stakeholders include direct users, like staff, and indirect users, such as funders (who receive reports) or service users (who benefit from processes)

- **Create Wish List:** Now you know what works - and what doesn't - it's time to decide what you *need*. What are your absolute musts? What would just be nice to have? There's a requirements checklist to help from page 4.

QUICK CHECK

- Create a list of all stakeholders.
- Research CRMs designed specifically for charities and fundraising.
- Check the provider's team has direct experience in the sector.
- Complete your **requirements checklist**.
- Audit current systems and processes.

Evaluating Providers

KEY QUESTIONS TO ASK

With your needs identified, it's time to evaluate CRM providers. Here's some essential questions, beyond those about your must-have features, to guide your search:

- **Is pricing straightforward?** Understanding the full cost of a CRM is crucial for budgeting. Ask about any potential hidden fees, like additional charges for extra users, features or transactions.
- **Are they ISO27001 certified?** Data security should be a top priority. ISO27001 certification is a sign that a provider is serious about data protection, ensuring your donor information is handled securely.
- **What are your onboarding options?** Choosing the right CRM is just the beginning, the right implementation is key to success. Some CRM providers outsource all onboarding, others offer in-house onboarding options too.
- **Are you able to access great training?** Ongoing training is essential to get the most out of your CRM. Providers who offer a variety of different training options and certifications help your team stay confident in using the system.

TIP: DOES THE PROVIDER UNDERSTAND CHARITIES?

Look for a CRM specifically designed for you, built by people with experience in the sector.

QUICK CHECK

- ✓ The CRM has clear, simple pricing.
- ✓ You have varied onboarding and training options.
- ✓ The provider is ISO27001 certified.

Requirements Checklist

COMMON KEY REQUIREMENTS

Requirement	Description	Must Have?
Donor Segmentation	Robust segmentation features to categorise donors/supporters by various criteria (e.g. donation frequency, amount, geographic location).	
Fundraising & Campaign Management	Tools for planning, executing and tracking fundraising campaigns, including online and offline channels.	
Donation Processing & Management	Integrated payment processing capabilities to handle one-off and recurring donations.	
Volunteer Management	Functionality to track, schedule and communicate with volunteers, including hours logged and roles performed.	
Event Management	Tools for planning, promoting and managing events, including registration and attendance tracking.	
Email Marketing Integration	Built-in or integrated email marketing tools to create and send newsletters, appeals and updates.	
Automated Workflows	Automation features for routine tasks such as sending thank-you notes, reminders and follow-ups.	
Reporting & Analytics	Comprehensive reporting tools to analyse donor data, campaign success, volunteer engagement and more.	
Data Security & Privacy Compliance	Ensure the CRM complies with data protection regulations like GDPR and offers robust security features (like IS027001) to protect your donor information.	
Mobile Accessibility	Mobile-friendly interface or app for accessing CRM data on the go.	
Scalability	The CRM can support your charity's growth, handling an increasing number of donors, volunteers and campaigns.	
Integration with Other Systems	Ability to integrate with accounting software, social media platforms, payment gateways and other tools your charity uses.	
Grant Management	Features to manage trust and grant applications, tracking and reporting.	
Customisable Reporting	Ability to create custom reports tailored to your specific needs and KPIs.	
GDPR Compliant Communications	Facilitates GDPR compliance by enabling communication with supporters according to their preferences, including the management of legitimate interest.	

Requirement	Description	Must Have
Online Fundraising Tools	Features for creating and managing online fundraising pages, peer-to-peer campaigns, and crowdfunding initiatives.	
Recurring Donations Management	Tools to manage recurring donations, including easy setup, modification, and cancellation options.	
Constituent Relationship Mapping	Ability to track and visualise relationships between donors, volunteers, partners, and other stakeholders.	
Onboarding	Comprehensive onboarding process to ensure a smooth transition to the new CRM system.	
Training	Provision of training resources and sessions to ensure staff and volunteers can effectively use the CRM.	
Multichannel Communication	Tools to manage communication across multiple channels (email, phone, SMS, social media).	
Data Import & Export	Easy data migration from your existing system and export options for backup and analysis purposes.	
Support & Training	Access to ongoing professional support, training and a dedicated account manager.	
Cost & Budgeting	Clear pricing structure with options that fit within your budget, including consideration of any hidden fees.	

Need more support and guidance?

Our experienced team of former fundraisers can help! They can talk through your requirements with you and, if you like, arrange a personalised demo of Donorfy. **Get in touch**.

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