

Finding the *Perfect* CRM Connecting Up

Intro

- ▶ Professional experience
- ▶ FundraisingForce
- ▶ Fundraising strategy
- ▶ Technology
- ▶ CRM searches
- ▶ CRM implementations



Agenda

- ▶ Overview of products available in market
- ▶ Six common misconceptions
- ▶ Who to involve
- ▶ Ten-point CRM search process
- ▶ Implementation of CRM
- ▶ Key takeaways

Products

- ▶ Fundraising platform
- ▶ CRM platform

Products - FR



thank()

- ▶ Fundraising platforms

eTapestry®

iMIS
by
asi ADVANCED
SOLUTIONS
INTERNATIONAL

Raiser's Edge NXT™

Blackbaud CRM™

Products - CRM



- ▶ CRM platforms



Misconceptions

- ▶ *I need to buy quickly*
- ▶ *I need to have it all*
- ▶ *Product “A” is the only one available*
- ▶ *Product “B” is the best available*
- ▶ *It must be good, X org uses it*
- ▶ *Product “C” will work out of the box*
- ▶ *I’ve used Product D before*



Who to involve?

- ▶ Cross section of staff
- ▶ Varying levels of staff
- ▶ Leadership
- ▶ Finance Committee
- ▶ Board

Ten-point process

- 1) Requirements gathering
- 2) Market research
- 3) Invitations
- 4) Request for Proposals (RFP)
- 5) Response meetings
- 6) Proposals
- 7) Demonstrations
- 8) Negotiations
- 9) Selection
- 10) Business Plan

Ten-point process

1) Requirements gathering

- Understand your org
- Articulate requirements
- Document your requirements
- Understand data to be migrated



Ten-point process

2) Market research

- Understand available product
- Decide whether you want to include FR and/or CRM platform
- Conduct initial research

Ten-point process

3) Request for Proposals (RFP)

- Write the RFP
- Match RFP to Functional Requirements
- Ask for elaboration of points

Ten-point process



Foundation – Request for Proposals for CRM Acquisition and Implementation

Stephen Mally, CFRE

14 July 2020

Version 1



1	EXECUTIVE SUMMARY	4
1.1	Process	4
1.2	Important Note.....	4
2	ABOUT	5
3	THE CRM SEARCH PROCESS	6
3.1	Platform and Partner Research	6
3.2	Confidentiality/Non-Disclosure Agreements.....	6
3.3	Partner Invitations.....	6
3.4	Functional Requirements Gathering	6
3.5	Functional Requirements Review	6
3.6	Request for Proposals (RFP) Written.....	6
3.7	RFP Released	7
3.8	RFP Response.....	7
3.9	Response Acknowledgement.....	7
3.10	Response Review	7
3.11	Demonstrations.....	8
3.12	Additional Session	8
3.13	Business Case.....	8
3.14	About the Consultant/FundraisingForce	8
3.15	Key Areas.....	10
4	CONFIDENTIALITY	12
5	BUSINESS REQUIREMENTS	13
5.1	Standard Approach/Start with Essentials.....	13
6	MISCELLANEOUS INFORMATION REQUIREMENTS.....	14
6.1	Firm Background	14
6.2	Implementation Team and Implementation Methodology	14
6.3	Customer Service.....	16
6.4	Customer Support	16
6.5	Ongoing Consulting Services	16
6.6	Product.....	16
6.7	Product Comparison	16
6.8	Website and Third Party Fundraising Platform	17
6.9	Payment Gateways.....	17
6.10	Data Migration - Importing	17
6.11	Project Comparison	17
6.12	Configuration vs. Customisation	18
6.13	Integrations.....	18
6.14	Training Options	18
6.15	Pricing	18
7	APPENDIX	
	SUPPLEMENTAL INFORMATION	20
7.1	Data Inventory	20

Ten-point process

4) Invitations

- Invite suppliers based on market research
- Describe process/timeline
- Set boundaries

Ten-point process

- 5) Response meetings
- 1:1
 - Group
 - Answer questions
 - Respect supplier's time

Ten-point process

6) Proposals

- Selection Committee
- Accept on deadline
- Acknowledge
- Create evaluation form

Ten-point process

7) Demonstrations

- Entertain demonstrations
- Structured agenda
- Don't create a circus
- Value investment of supplier

Ten-point process

8) Negotiations

- Negotiate
- List price is not best price
- Driving the bus
- Competitive environment
- Contract

Ten-point process

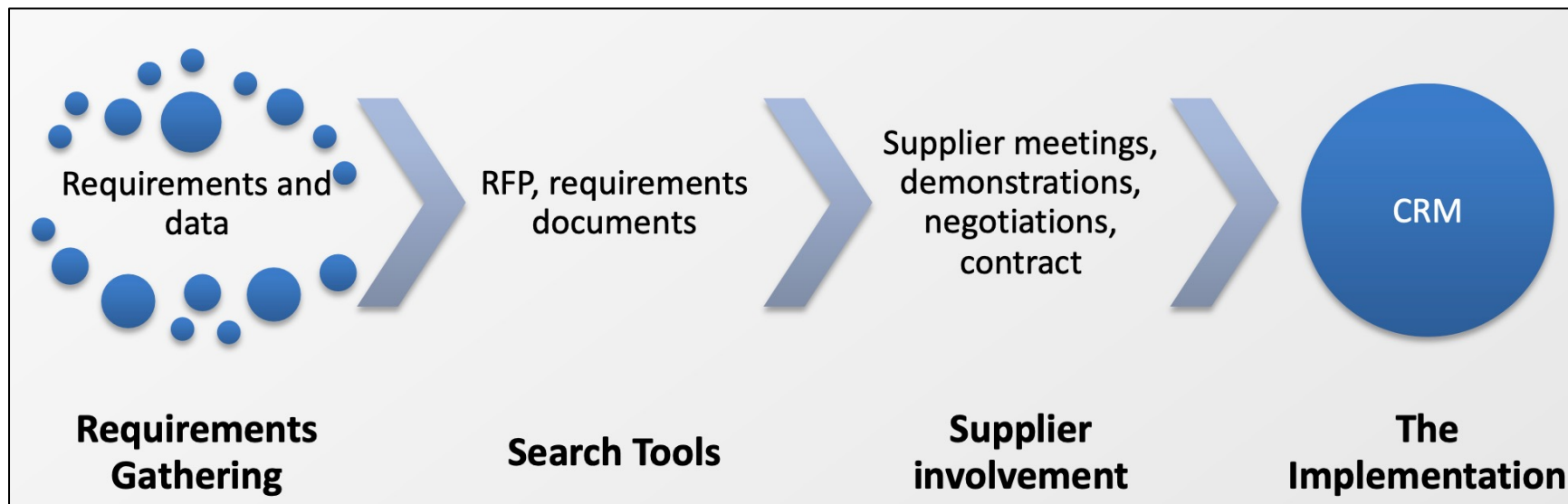
9) Selection

- Check referees
- Check non-referees
- Speak to former customers
- Select the best
- A relationship/not a transaction

Ten-point process

10) Business Case

- Write a solid business case
- For board/leadership
- Review process
- Due diligence
- Include true cost of ownership



Ten-point process

Implementation

- ▶ Start with the data, start early
- ▶ Build a precise SOW
- ▶ Ensure proper participation
- ▶ Engage a Project Manager



Takeaways

- ▶ Don't overbuy technology
- ▶ Acquire something you can grow into
- ▶ Ensure organisation readiness
- ▶ Know what you are looking for and find it
- ▶ Understand your requirements

Takeaways

- ▶ Make sure suppliers understand your requirements
- ▶ Separate yourself from supplier influence
- ▶ Not buying *buttonology*/you are acquiring a relationship
- ▶ Hire a consultant to run CRM search process for you

Questions?

Contact me

Stephen Mally, CFRE
Director

stephen@fundraisingforce.com.au 

www.fundraisingforce.com.au 

+61 430 500 524 

@FRaisingForce 

 fundraisingforce