



# What's New in Donor Management Systems

October 18, 2017

idealware



# www.Idealware.org

The screenshot displays the Idealware website homepage. At the top, a navigation bar features the Idealware logo on the left and a "DONATE" button on the right. Below the navigation bar is a large hero section with a blue background and a blurred image of people. The hero section contains the text "Helping Nonprofit Organizations Succeed with Technology" and "Find original research, insights, and assessments to help you overcome your challenges. Just enter your keyword." Below this text is a "Keyword Search" input field. To the right of the hero section is a grid of featured content. The first item is a "2016 Consumers Guide to Grants Management Systems Vendor Product Update Supplement" dated November 2016, categorized as a "CONSUMER GUIDE". Below this is an "INSIGHTS" article titled "Charity Shopping: Too Good To Be True?" featuring an image of a hand holding a smartphone. The second item is an "INSIGHTS" article titled "When We Go with Accessible Content, Everybody Wins" featuring an image of a person using a laptop. The third item is a "TRAINING" video titled "Low-Cost Tools for Data Visualization" featuring a video player interface with a play button and a speaker icon.

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DONATE

## Helping Nonprofit Organizations Succeed with Technology

Find original research, insights, and assessments to help you overcome your challenges. Just enter your keyword.

Keyword Search

GMN Technology Affinity Group idealware

### 2016 Consumers Guide to Grants Management Systems Vendor Product Update Supplement

November 2016  
CONSUMER GUIDE

Vendor Product Update Supplement to the 2016 Consumers Guide to Grants Management Systems (First Edition)

INSIGHTS

### Charity Shopping: Too Good To Be True?

INSIGHTS

### When We Go with Accessible Content, Everybody Wins

INSIGHTS

### Low-Cost Tools for Data Visualization

TRAINING



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## IDEALWARE

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# What We'll Cover

The 2017 Consumers Guide to  
Low Cost Donor Management  
Systems

The Donor Management Market  
Steps in Selecting Software





# What Are Your Questions?



# How to Get the Report



The screenshot shows the Idealware website with a navigation bar at the top. The navigation bar includes the Idealware logo, a 'Browse Topics...' dropdown menu, a 'Keyword Search' input field with a magnifying glass icon, and a 'DONATE' button. Below the navigation bar, the article title 'A Consumers Guide to Low-Cost Donor Management Systems' is displayed, followed by the author 'By Kyle Andrei, March, 2017'. Below the article title, there are social media sharing icons for Facebook, Twitter, and LinkedIn, and a 'SHARE THIS WITH A FRIEND:' label. To the right of the article title, there is a 'SPONSORS' section. Below the article title, there is a large orange call-to-action box with the text 'Download it at idealware.org'. Below the call-to-action box, there is a section titled 'Donors are the lifeblood of nonprofit organizations. You need them to survive. But how do you manage all the details of their giving along with all the personal details that are key to maintaining successful relationships without breaking your bank? This report looks at a number of low-cost donor management systems designed to do exactly that.' Below this text, there is a section titled 'Years ago, Idealware and NTEN came together to take on this challenge with the first Consumers Guide to Donor Management Systems, which reviewed a number of low-cost systems against a list of criteria and made direct apples-to-apples comparisons to help readers decide which could best help them meet their missions. The marketplace evolved, with new systems appearing'.

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Browse Topics... Keyword Search

DONATE

A Consumers Guide to Low-Cost Donor Management Systems

By Kyle Andrei, March, 2017

SHARE THIS WITH A FRIEND: f t in

SPONSORS

Download it at  
idealware.org

NTEN





# Methodology

1. Define vendors to be included.
2. Set review criteria.
3. Complete summary reviews.
4. Identify shortlist.
5. Complete detailed reviews.





# What Makes a Donor Management System?





# Foundational Features



- Adding and Tracking Donations
- Managing Donor Information
- Mail Merge, Email
- Querying
- Reporting



# You Might Need Other Features

Consider Prospecting and Proposals, Event Management, Volunteers, Membership, Social Media Integration.

But beware of Shiny Object Syndrome.

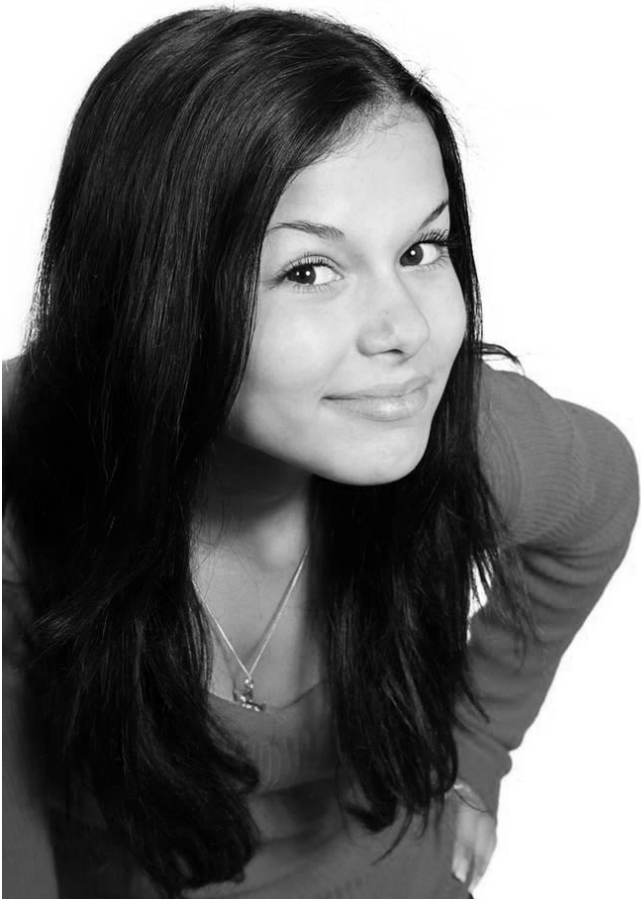




# Don't Forget About Customer Experience

Is it easy to use? How much support and training are provided?

What are your responsibilities vs vendor responsibilities?





# Systems Reviewed

- @EASE Fund Development Software.
- Abila Fundraising 50
- Akubo CRM
- BasicFunder Premier
- **Bloomerang**
- Causeview
- **CiviCRM**
- DONATION
- Donor Tools
- DonorCommunity
- **DonorPerfect**
- DonorSnap
- **eTapestry**
- EveryAction
- **Exceed Beyond**
- Exceed! Premier
- FastFund Raising Online
- **Fundly CRM**
- FundRaiser Select
- Kindful
- **Little Green Light**
- MatchMaker FundRaising Software Enterprise Edition
- **Neon CRM**
- Network for Good
- Nonprofit Manager
- **Salesforce Nonprofit Success Pack**
- NPOconnect (formerly Orange Leap)
- The Raiser's Edge NXT
- ResultsPlus
- **Salsa CRM**
- **Sumac**
- Sustain
- Talisma Fundraising Online
- Total Community Manager
- Total Info





# The DMS Market







Average First  
Year Cost:  
\$1,598

# Cost of Systems

Total Cost of Ownership  
Includes:

- License (one-time or subscription)
- Setup
- Configuration
- Data Migration
- Training
- Tech Support
- Staff Time

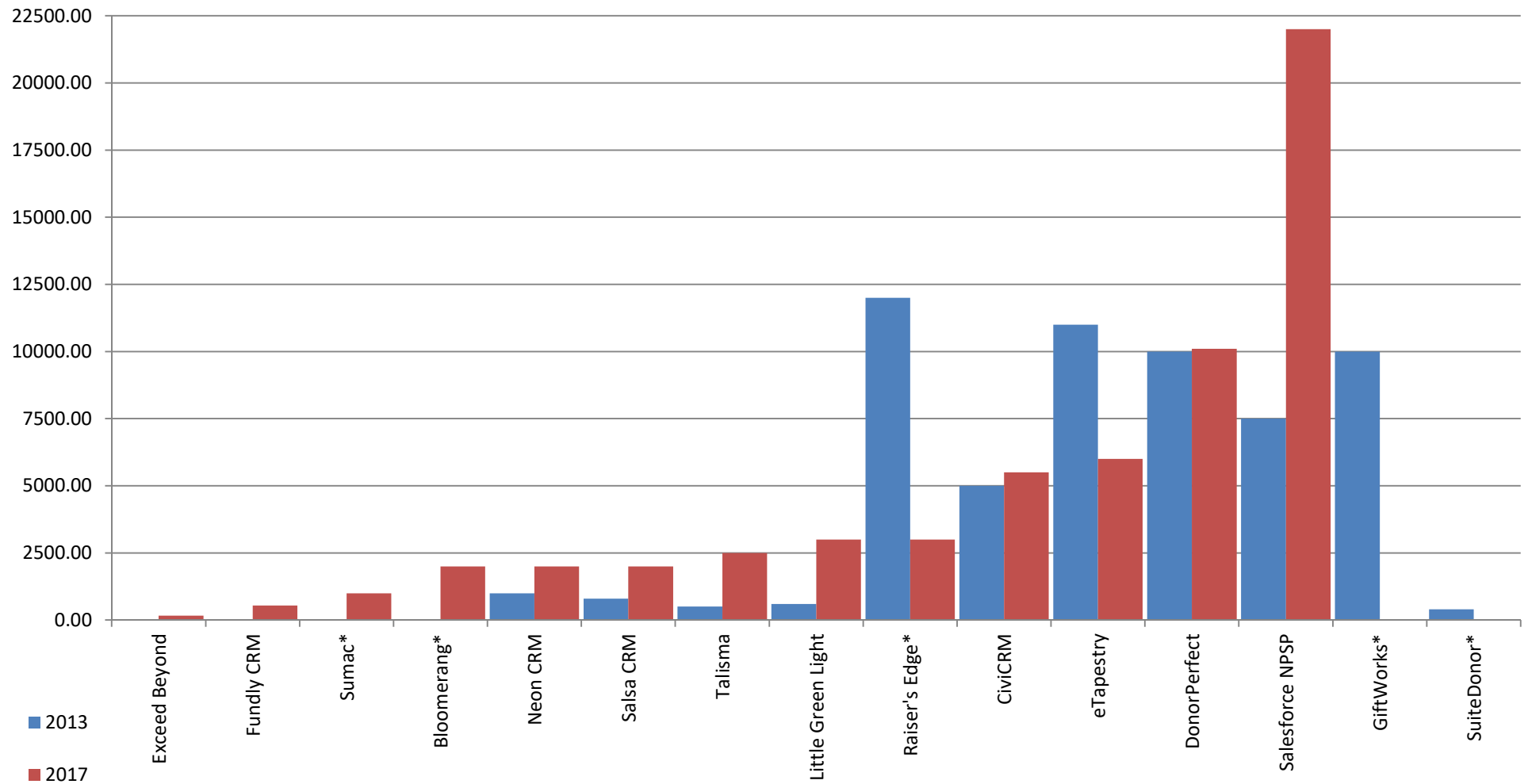






# Customer Base

How many nonprofits are currently using this product?



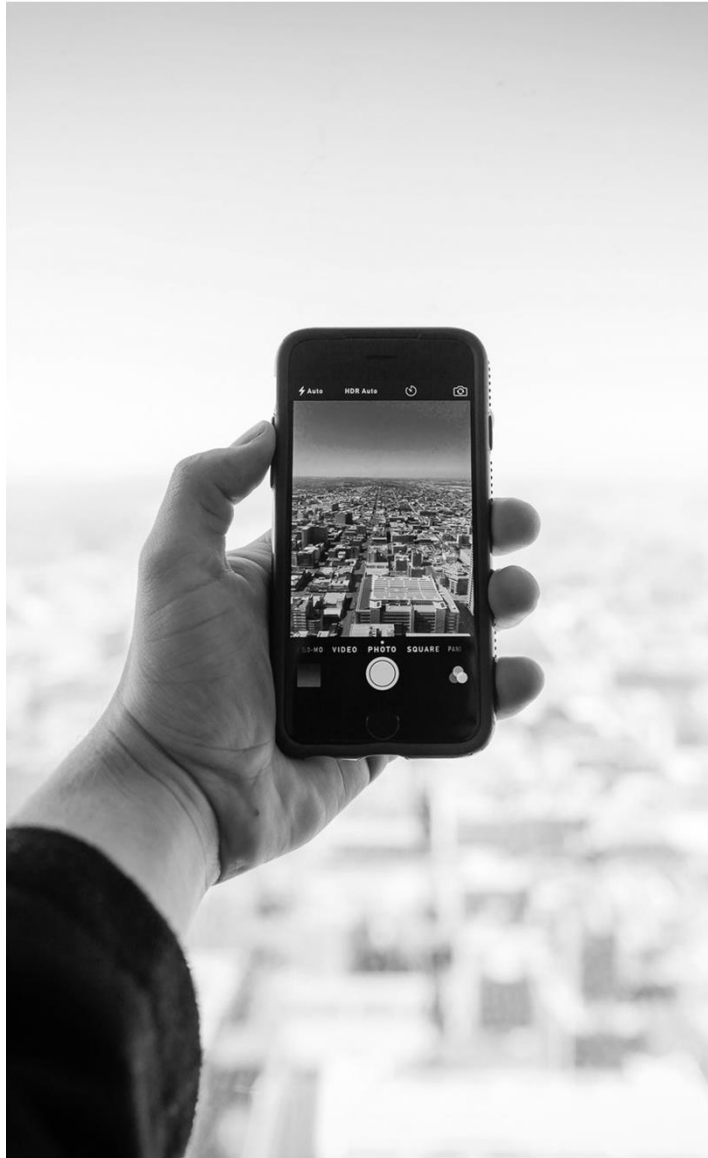


# Recent Product Development

Overall, development focused on:

- User Interface
- Reporting, with focus on high-level trend analysis
- Streamlined gift acknowledgements





# Trends

- “Mobile first”
- Automation
- Focus on best practices
- Cloud is king
- Donor records, unlimited users
- Bundled pricing





# Points of Differentiation

- Support for pledges
- Bulk gift entry
- Support for other constituents
- Integration and customization





# What's On Your Shortlist?





# Consider Your Priorities

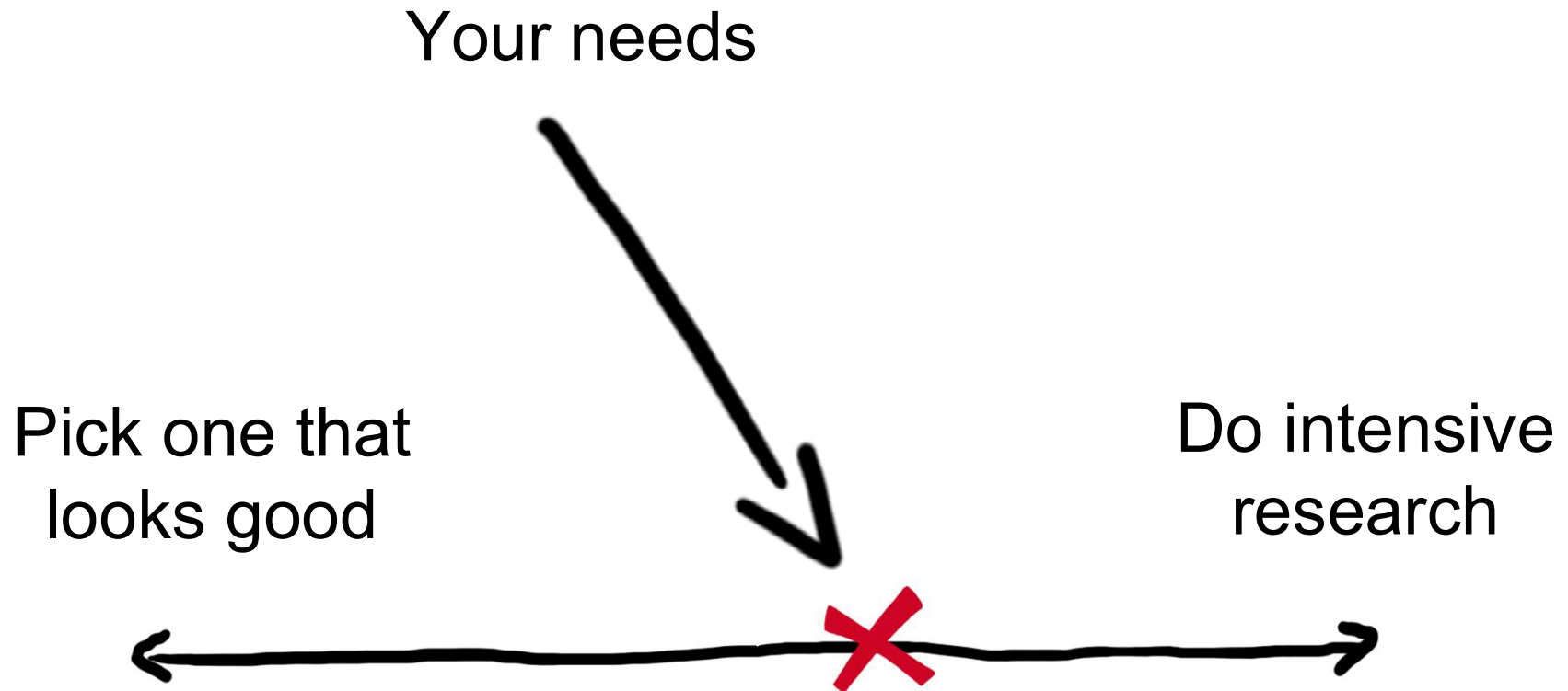
- Just the basics
- Small but growing
- Easy setup and UX
- Events critical
- All people in one system







# Right-Size Your Process





# What Do You Really Need?

What features are essential?

What would be nice to have?

What is unnecessary?





# Research a Shortlist



Based on your needs,  
winnow down to a list of  
2 – 5 systems to  
investigate.





# Schedule Live Demos With Vendors



Contact vendors and tell them you'd like to schedule an hour-long online demo. Unless they're huge, they should be happy to do this.





# Do Your Due Diligence

Review contracts,  
looking closely at  
uptime guarantees  
and exit clauses.

Check references.





# Make a Thoughtful Choice

If you gather good information and involve your team in the process, you can be confident you made the right decision.







# Wrap Up





# Reach Out to Us

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