Karen Graham

IDEALWARE

Executive Director
karen@idealware.org
@karentgraham
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

Download it at idealware.org
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
Cost of Systems

Total Cost of Ownership Includes:

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

Average First Year Cost: $1,598
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

Your needs

Pick one that looks good

Do intensive research
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

Idealware: info@idealware.org
Karen: karen@idealware.org / @karentgraham

Visit us online:
Idealware.org
Facebook.com/Idealware
@Idealware