dp donorperfect

How to Buy Fundraising Software

Find your path to growth

EVALUATING FUNDRAISING SOFTWARE'S CORE CAPABILITIES

Contract

- ◯ Month-to-month flexibility
- ◯ Merchant services account w/no monthly fees

Data Management

- ◯ Donor management
- ◯ Custom fields
- ◯ Membership tracking
- ◯ Volunteer scheduling
- ◯ Alumni and student lists
- ◯ Import capabilities for donor and gift data

Implementation, Training, and Support

- ◯ Implementation coordinator
- ◯ Data migration
- ◯ Training by role
- ◯ Training by experience level
- ◯ Phone support
- ◯ Chat support
- ◯ Email support
- ◯ 24/7 emergency line

Fundraising

- ◯ Email and direct mail segmentation
- ◯ Constant Contact email marketing integration
- ◯ Mail merge
- ◯ Grant tracking
- ◯ Contact management
- ◯ Moves management
- ◯ Special events
- ◯ Prospect research
- ◯ Peer-to-peer fundraising
- ◯ Marketing and communications
- ◯ Gift Processing
- ◯ Recurring/monthly gifts
- ◯ Mobile giving
- ◯ In-person gifts
- ◯ Gifts via phone
- ◯ Seamless integration
- ◯ Online donation forms
- ◯ Split gifts, soft credits, and tributes
- ◯ Matching gifts
- ◯ QuickBooks integration
- ◯ Automated alerts

Reporting and Analysis

- ◯ Giving analysis
- ◯ Campaign and solicitation effectiveness
- ◯ General ledger summaries
- ◯ Donation summaries
- ◯ Pledge tracking
- ◯ Capital campaign analysis
- ◯ Major donor analysis
- ◯ Constituent reporting
- ◯ Custom reports
- ◯ Scheduled reports

INTRO

Chart a path for your goals to grow into accomplishments

Don't settle for a system that stops at the basics. No matter how steadfast your goals are, the tools you'll need to reach them will inevitably change as your organization grows and the fundraising landscape evolves.

That doesn't mean you need to spend lots of money on a bells-and-whistles system that's packed with features you might not ever use.

Instead, start with a strong core system that you can customize according to your goals as you grow.

Your goals can only be as successful as the network that supports them

Never underestimate the value of services designed to ensure you're set for success from the moment you purchase your software and beyond. Three key services to consider when evaluating fundraising solutions are setup, support, and training.

SETUP

When you invest in fundraising software, it's important to start off on the right foot. A thorough setup and configuration of your software system is needed to make sure your data is properly transferred, and the fields and functions you'll depend on are setup to your organization's specific needs.

As you investigate, be sure to ask specific questions about setup, like:

- Do you have an expert implementation team that delivers full data conversion?
- How long is the implementation process?
- Do you offer a consultation to fully customize my system to my needs?

TRAINING

Training is essential to maximize your investment in fundraising software. No matter how intuitive a system may be, there are always a few questions, tips, and tricks that a training professional can help you with so you get started on a solid foundation.

Options and pricing will vary from product to product, but most companies offer:

Online and webinar training: An instructor connects live to your computer and provides you with step-by-step instructions and best practices on how to use your system. These online and webinar training sessions can be private or public. Find out pricing and format to decide which is best for you.

In-person training: An instructor travels to your place of business to walk you through features and processes one-on-one. You can meet with an instructor individually or choose to have additional staff members attend. This option is typically more expensive than online and webinar training.

It's important to make sure that the company you're choosing goes beyond training basics by providing:

- **Expert webcasts** - Attend online learning sessions hosted by industry experts.
- **CFRE certification** - Obtain certification for fundraising professionals who demonstrate the knowledge, skills and commitment to the highest standards of ethical and professional practice in serving the philanthropic sector.
- **An interactive online learning hub** - Connect with other nonprofits, review your support case history, learn new features, and discover (and provide) useful tips and best practices.

An account representative should be able to provide you with everything you need to know about training options and work with you to determine which type of training is best for your team and your budget.

What level of support are you looking for? Support options typically include telephone, email, and chat.

SUPPORT

Be wary of software solutions that don't offer phone support.

When you're in a time crunch and need a quick fix, having an expert a phone call away is critical to getting things done. Phone support is also helpful when you want to tackle a complex issue that requires a conversation.

Know you're not alone.

You want to work with a partner that has helped tens of thousands of fundraisers overcome the obstacles and challenges of the job. Look at customer review sites to see what customers say about a company's support services.

Learn from community of your peers.

Are you able to interact with other professionals to ask questions, share tips, and learn best practices? It's a good idea to look into the network that your fundraising software partner can provide, so you can connect, collaborate and engage with fellow members of the nonprofit community.

Flexibility on pricing and contracts is paramount to ensuring that you'll always be making an investment that fits within your budget.

A quality solution shouldn't require a long-term commitment, because your satisfaction will cause you to want to keep your subscription. Be wary of any solution that would trap you in for the long haul. You want to choose a solution you couldn't imagine living without, contract or not.
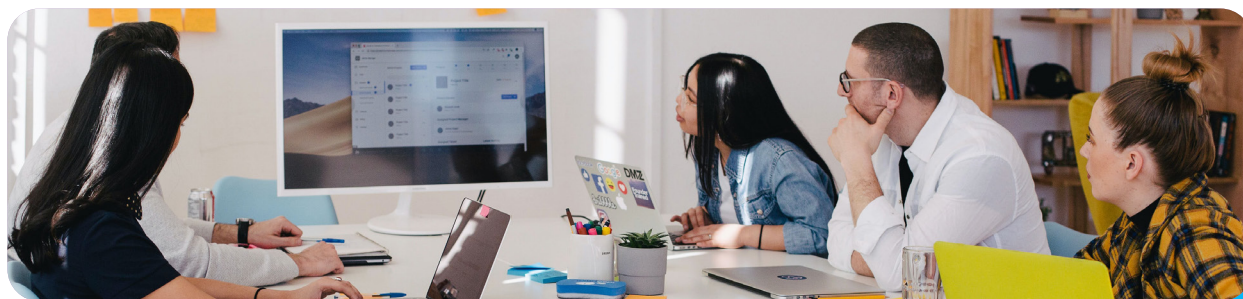
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Knowing who you're working with is equally important as knowing what you're working with. The following are a few steps you can take to help you feel confident that the company you're placing your trust in will be there in the future to support your software investment.

Does the company have a strong reputation?

Here are some questions your research should answer:

What's their history of developing solutions for nonprofit fundraising and donor management?

Have they only recently started making products for this market? (It's in your best interest to seek out a company that thoroughly understands the nonprofit community through years of experience serving it.)

What relationships does the company have with other companies in the fundraising software market?

Are they affiliated with any nonprofit organizations?

Does the company have any certifications with other well-known companies?

Are they financially secure? You want your vendor focused on you, not shareholders or venture capital funds.

Get your key stakeholders on board with fundraising software.

Making a major purchase decision requires collaboration and coordination with key stakeholders throughout your organization: IT staff, development, volunteer managers, executives, and most importantly, your board. Whether you're a smaller nonprofit needing approval of your board or a larger nonprofit looking to get the go-ahead from the members of your development team, it's crucial to obtain the buy-in and participation of your key stakeholders when making such an important decision for the future of your organization.

THREE STEPS TO GETTING BUY-IN FROM STAKEHOLDERS

1. Make sure everyone is in the know

Gaining alignment across multiple groups is an exercise in communication. You need to keep them informed from the start.

2. Give goal-based reasons why you're looking to buy.

Define why you're looking at fundraising software by listing the goals you're trying to accomplish and the challenges you're working to overcome.

3. Show and tell.

Ask the companies you're considering to provide you with shareable material that can enable stakeholders to make informed decisions around the question of purchasing one system over another or the benefits of fundraising software as a whole.