

Guide

Five key points to consider when selecting a database or CRM

Mags Rivett
Marketing Manager
Purple Vision



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Choices, Choices, Choices

If you are looking at CRM or databases, a great place to start is by asking other people. Nearly every week in various LinkedIn groups, a conversation will start along the lines of ‘...which is the best database or CRM for small non-profits or charities’.

A public forum of your peers is a good place to start to find answers to the question that could transform your work. There are hosts of vendors, consultants and experts on hand to chip in with suggestions – which will often lead you to find products you might not have heard of.

Mostly this is good as you now have a field of options to research and compare. Sometimes it’s less helpful as you could be tempted to strike out options that might work for you based on other people’s views when actually that tool might work well for you.

It’s also important to separate the tool from the vendor – choosing a tool and choosing who will help you with implementing it and embedding it into your organisation are two different decisions, though are often intertwined.

So let’s look at a five-point approach to help you sort out the responses and find what’s right for your organisation.

1. It all starts with strategy

Why do you roll up to work every day? My bet is that it’s not because you love processing transactions. My bet is that it’s because you love what the transactions – be they donations or payments for a performance – bring to life.

Take a step back from thinking about the minutiae of that donation and the processes associated with it that you’d like your new CRM to simplify for you. Start by looking at the bigger picture.

Let’s say in two years you want to have started a fundraising programme that involves hosting a gala ball where you need to manage celebrity and VIP presence, in line with your new Patrons programme. Or you are going to launch a new direct mail programme to boost ticket sales or fundraising activity. And in five years you want to be supporting another thousand people through an arts participation programme, so will have 100 more staff and volunteers? They might sound like ambitious plans (especially if your organisation is tiny, and it’s just you in the office), but these are legitimate strategic goals.

It is important to consider your longer term strategy now, so you can put the right basic building blocks in place with a CRM that will meet your needs now, and five years down the line as you scale-up from meeting your fundraising goal to support another thousand people. Think about what the top level strategic aims may mean in practical terms. If your

strategy includes words like develop, improve, integrate, deliver you will need to look at a flexible, scale-able CRM solution.

2. Integrations

If you are already happily using a set of tools to organise your email programme, you may break out in a cold sweat at the prospect of having to set it all up again.

So start to look at systems that will integrate with tools you use already. Your goal here will be to integrate as much as possible and bring all the data into one place.

Think bigger than fundraising integrations – think about the whole team – volunteering, finance, HR. Who uses what? With the right CRM you can integrate your organisation internally to work smarter as well as integrate the tools each team uses into one CRM. This will improve your reporting no end and make it easier for everyone to be ‘smarter’.

You may want to use this as an opportunity to review the tools you currently use - in most organisations, our digital integrations have grown organically to become a part of our day-to-day toolkit, so a step back can be revealing.

3. Ease of use

If you want to be all jargon about this you can all it UX. But speaking plainly, user experience is everything. If the whole team don't find the system easy to use, you're already on a highway to nothing!

That means everyone from the early adopter in your team who always has the newest phone through to those who fondly remember the days of the fax machine. So look at a few tools, ask to see more, play with a couple, ask someone else if you can look at theirs. Which ones do you like? Why?

And while you are doing that, ask some questions about accessibility.

In today's world, being able to access your system at any time of day or night is a basic expectation. There's no need to log in via a server in the cupboard under the stairs anymore, and only when you're in the office on a desktop PC. You should be able to use your phone, tablet, laptop, PC, be at home or be on the other side of the world and see it all real-time. Minimum IT fuss and maximum usability and accessibility.

If security of 'cloud' software is a concern, ask the questions of vendors you look at. They will be able to explain their security settings and protocols to you. The cloud is safe and secure, but you will obviously need to do your own due diligence around any risks or concerns you have.

4. On tap expertise

Small charity usually means a small team, who often wear many different hats. You might be super-talented and very capable, it's important to accept that you can't be an expert in everything. There will be times when you need assistance with making the most of your system.

Choose a tool which has a community or network of developers and experts around it and this will give you choice. Choose a tool which encourages developers to work with it and keep innovating.

There's usually a roadmap for a product or service that you can ask about. Check whether that product roadmap will keep pace with your changing need. When a system is open about working with a community of developers, you won't be hampered by waiting for a particular products roadmap. A developer will be able to 'get right on it' and either build you something you need, or add something that already exists. More professionals working with a tool or system means more competitive pricing around this, too.

5. Be realistic about budget

Pricing models have changed since the days of the server-under-the-stairs installations. Most modern systems are based on the number of people who need licenses to use them, the type of integrations and applications that are used on the platform and more. So now you will be looking at an ongoing monthly running cost which is much more manageable and transparent than a lump sum (but will mean a change in how you plan your budgets, probably).

But do be realistic about costs for set up – unless you have an expert database developer and administrator on your team, who can ignore their other tasks while this work takes place, you will need to set aside some cash to help get the system set up as you want it, data transferred in, and staff trained and ready to roll. How much will depend on the system, your requirements and number of staff.

With these five points in mind, you might realistically ask your question about CRM again, but in a slightly more focused way – 'I need a CRM that will X, Y, Z' – and the quality of answers you receive may well be very different.

Typically, there will be two or three names that come up time and again. And there you will probably have your shortlist.