TOOLBOX FOR THE MODERN NONPROFIT

Why CRM Could Be Invaluable To Your Organization

EVER SIT IN FRONT OF YOUR COMPUTER DREAMING OF A DAY WHEN…

...You could view all your data in one place?

...You could see every phone call, every email, every interaction captured on every constituent?

...You didn't have to worry about making a backup of your data?

...You could look up a donor's information from your mobile phone?

...You could create or change a report without headaches and without help?

Some would say that competition for a constituent's time and wallet share is at an all-time high and growing steeper. So how much are donors worth to your organization? What are the challenges you face every day to find and keep them? Are your existing tools helping you create opportunities, or are you losing opportunities because of them? And finally, how much time do you spend wrestling with your technology when you're searching for information, consolidating data from various places, or not finding it at all?

Why not skip the old frustrations and explore a technology solution that can make your nonprofit more efficient, coordinated and nimble—and less likely to miss out on opportunities? When old donor management software just can't measure up, there's a better, easier way to get the most from your relationships.

In the for-profit world, CRM (Customer Relationship Management) is a proven approach that has for years allowed customer-facing organizations to provide better service to their customers, find more customers and generate more customer loyalty. It's not just a technology but also a way of doing business. For nonprofits, CRM translates to Constituent Relationship Management, but its function is essentially the same—helping you find more constituents, generate greater loyalty and provide better service as needed.

In today's times of stiff competition and limited donor dollars—a time when relationships are key—many of the technology tools traditionally used by nonprofits actually hinder relationship building. Often only a few staff members have access or are trained to use the systems. Often these systems have evolved over time and are very complex and hard to use. And with more and more avenues of communication available to constituents, technology is changing how they prefer to engage; unfortunately, traditional donor management systems do not communicate with these new media or the other applications you probably use on a daily basis. As the impact of technology on constituent behavior takes your organization's needs beyond what the traditional tools can deliver, it's time to consider a new (and easier) way of doing things.

Using Constituent Relationship Management (CRM) systems, many nonprofits are catching up to retailers like Amazon who have utilized this technology for years to build better relationships with their customers. As a nonprofit organization, isn't that what you want to be able to do? Shouldn't the tools you use enable you to do it?

WHAT IS A CONSTITUENT RELATIONSHIP MANAGEMENT (CRM) SOLUTION?

For starters, it's a better contact management system. You can use it to manage your relationships with everyone who comes into contact with your organization, by any means. It will connect seamlessly—if not replace completely—the other programs and applications you use on a daily basis, giving you a total view of your constituents.

CRM is also tailor-made to work with the technologies your constituents use to communicate. With the rising popularity of social networking and media such as blogging, YouTube, Twitter, Facebook, and LinkedIn (to name just a few), you need a solution that helps you communicate in the ways most likely to engage your constituents. CRM solutions can connect you to your constituents with any or all of these technologies and help you learn more about them and their relationships.

HOW WILL IT HELP ME MANAGE MY RELATIONSHIPS?

Traditional donor management systems simply stored your information. But with the intense competition for dollars, volunteers and mindshare that nonprofits face today, you need to do more than store information about your donors. Relationship management means knowing all of your contacts and constituents (not just donors), understanding their relationships with others, and coordinating those relationships into action for your cause. CRM makes all of that possible.

Suppose your mission is to save abandoned animals through pet adoption. With CRM, you can record information about the adoption family and so much more: like the pet's medical history, the date of the adoption, the condition of the animal, and any number of other important details.

How about having information available to multiple people within your organization at the touch of a button? CRM allows your executive director or development director to create tasks for others. It also enables your staff to capture meaningful constituent interactions in real time.

HOW WILL IT MAKE MY WORKDAY EASIER?

The wow-factor of CRM goes way beyond serving constituent related needs. With CRM you can easily bridge your mission with your fundraising: it will blend your program work with operations like fundraising and case management, so that you never again have to open a handful of different applications to see the big picture. CRM solutions even support custom mission-focused applications, so you can track anything from adopted pets to teacher applications to eyeglasses flown to Rwanda.

Best of all, CRM helps you work more efficiently every day. How? It coordinates the many things you do on a daily basis into a series of steps that are manageable for you and your staff. It keeps everything you need in one place, accessible via a single dashboard. This means fewer sticky notes, FYI emails and debrief meetings, and more focus on getting things done for your mission.

Let's say a new donor gives more than $1,000:

- You'll want to be notified instantly
- Your CRM can prompt you to send a different acknowledgement letter than your standard letter, and
- The system can flag a staff person to follow up with a phone call

Your CRM can organize (and track) this series of steps as a "workflow" process that begins automatically as soon as the gift has been captured.

THINK ALL OF THAT SOUNDS TOO GOOD TO BE TRUE? THINK AGAIN.

Here are five uncommonly cool ways CRM can help you create opportunities for your organization.

1. Seize the Day and Your Data

Tired of being ruled by your software? If you're like a growing number of nonprofits, the number of actual users of your donor management system is small. Why is that? For a variety of reasons—system complexity, difficulty of use, fear of corrupting data, homegrown database, department focus—your organization has adapted to fit the software you're using, not the other way around.

We understand that your database is your livelihood, and because mistakes are costly in any system, it's understandable why you can only have one or two people using your donor management software at a time. The problem is, the environment you work in today requires you to be quick and flexible. You have a whole team of people in your organization who have knowledge about your constituents, or a need to access that knowledge. They all need to be able to use the system—not just one or two people in one department.

That's what prompted Susan G. Komen for the Cure® Austin Affiliate to adopt a CRM solution to replace their old systems. "It's so easy to use that we can train different levels of people, like our key volunteers and board of directors, to use it," Executive Director Ramona Magid said. "But the biggest benefit I see is connecting all the pieces. We've been spinning our wheels using different spreadsheets and databases, and the information was not easily accessible. Our CRM will change all that."

"The biggest benefit I see is connecting all the pieces."

Ramona Magid, Executive Director, Susan G. Komen for the Cure® Austin Affiliate

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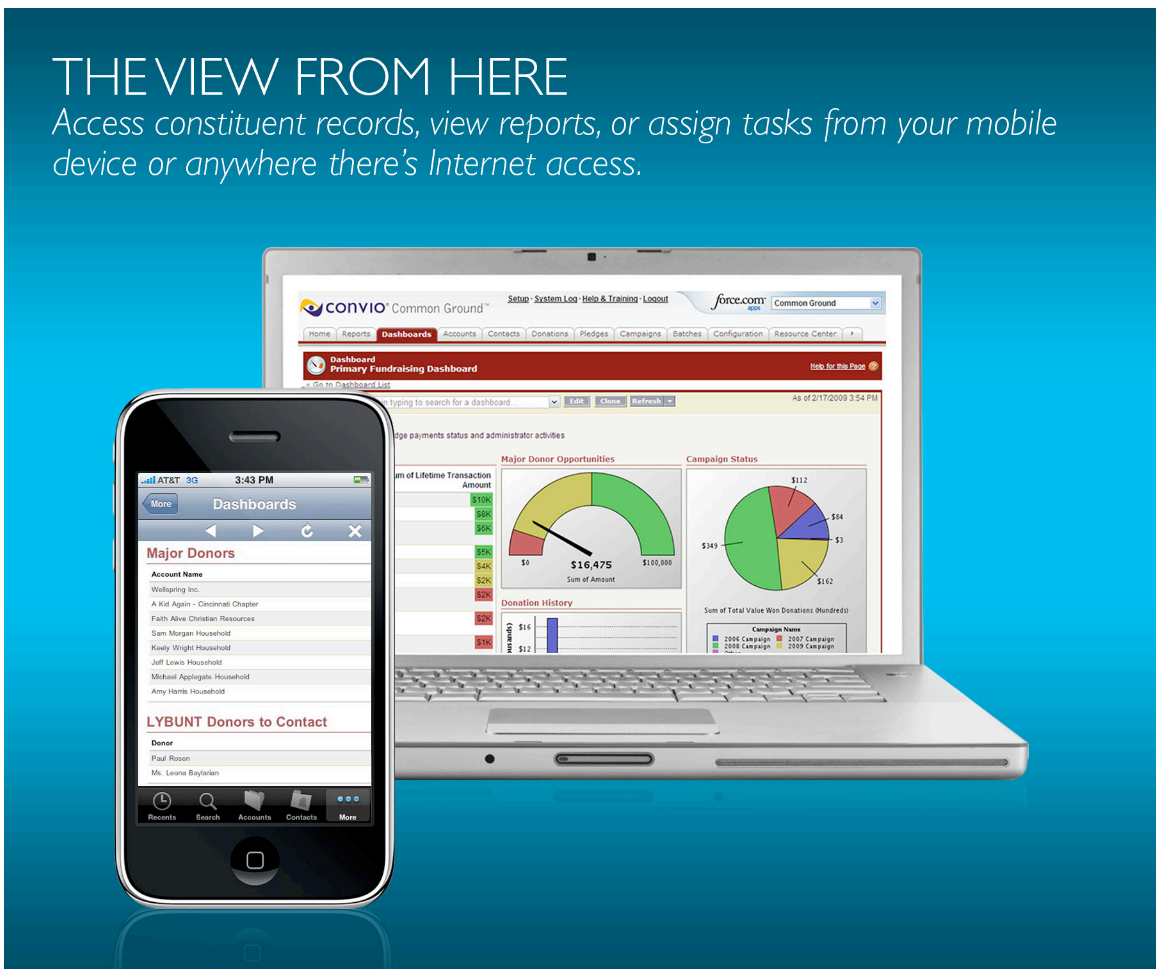
CRM allows for collaborative access, and because of the level of controls available, the fear is gone. You and others in your organization have easy access to the information you need, and you can control that access right down to who can run reports, who can edit records, and even what fields are visible to whom. This way, for example, everyone knows which records are marked as current or potential major donors, but only select staff can see exactly how much they've given, access their contact information and modify the details. Lock it down, open it up—it's as easy as "yes" or "no" in a checkbox.

2. Anytime, Anywhere Access

Modern CRM systems allow Web access from any browser. You can work from anywhere there's Internet access, and at any time. Your system is accessible to anyone you've granted access to, and their level of access is controlled by the parameters you set. It makes no difference if they're working from home, on the road or in the office. When they log in, your CRM knows exactly who they are and respects the rules you've established.

Here's a nice surprise - with the right Web-based CRM, you can even use your Blackberry or iPhone to pull information about a major donor you're about to walk into a meeting with. (For example, what other relationship might they have with you besides "donor"? Are they also volunteering?) Or, access records while you're at a fundraising event, and update the record immediately with tasks for your team to provide follow-up. Wouldn't it be great if thank you notes or receipts were already in process back at the office while you were still at the event?

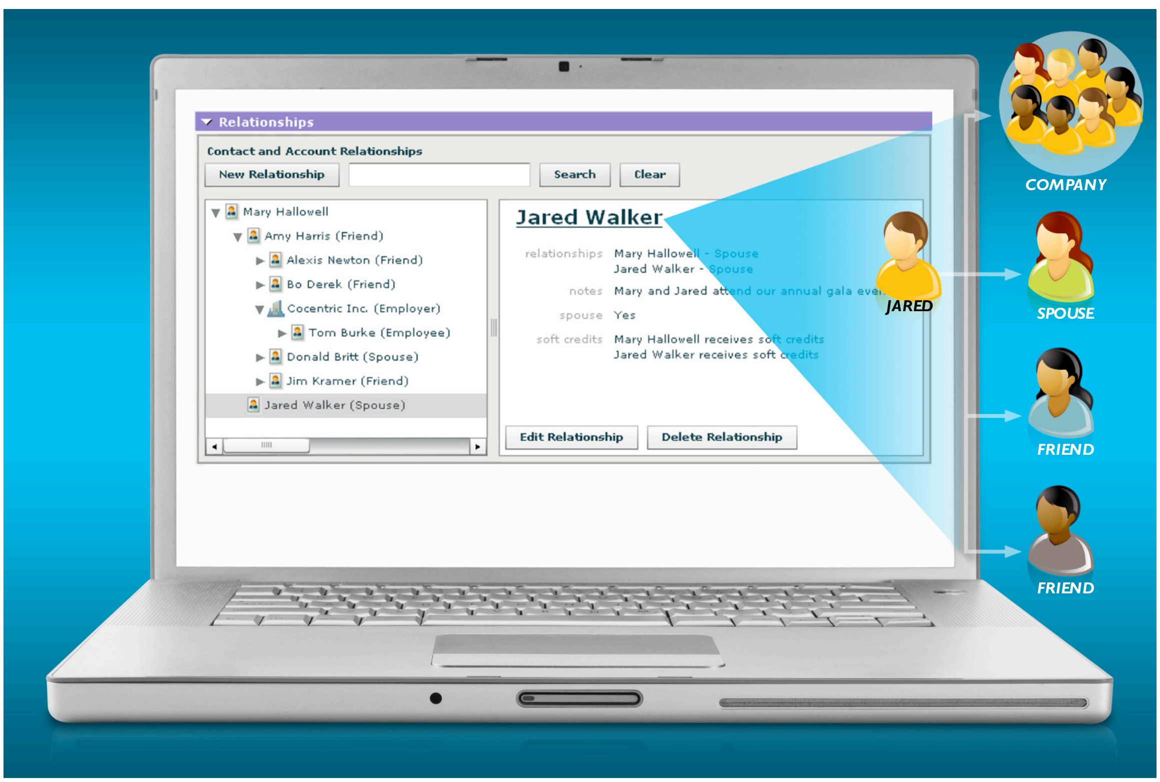


3. A Better View, A Bigger Impact

True relationship management is not just about managing your relationship with your donor; it's about coordinating your constituents' relationships with one another. CRM allows you to keep track of your constituents, their networks, and how all their actions toward your cause are interrelated.

Of course you want to be able to see household relationships, but what about employer to employee relationships, constituent to constituent, or board member to target major donor? Relationships are king, and with CRM you can see all of their many layers.

Suppose a local corporation has a group of 60 employees who regularly volunteer for your nonprofit. Your volunteer coordinator knows about them. But none of these people have given money, so none are in your donor database. You're not seeing the whole picture! If you had CRM you'd know that this company would be a great prospect for an employee campaign, a sponsorship, or a Walk team, etc. With CRM your volunteer management, campaign management and donor management systems would all be communicating for a coordinated proposal.



4. Speaks Your Language

CRM fits within the organization and the way you work. Don't settle for "one size fits some" when your CRM can be tailored to meet the needs of each department and integrate with other systems.

You can change your CRM to look like, sound like, and fit in seamlessly with your organization. For example: change the page layouts your staff see based on their role and modify fields to the language you use. Add new fields that are important to your unique organizational structure or remove fields that do not add value to how you work. The best part is, you can do all this through clicks – not code. And you can do it yourself: no more calling IT or the system vendor to do something that is standard in almost any off-the-shelf program.

CRM also fits into your daily processes. For example, if you're like most organizations, you use Outlook for your business processes. Let your CRM system automatically assign predefined tasks to others via Outlook. With a simple click, the owner of the task is back in the system to get the context of the request. With another click, you can add any outbound email communication from Outlook to the contact's record, so that you never lose track of who has been corresponding. Then automatically send your board members reports detailing your progress via email (no more sending one-off packages).

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>
> *Alan Graham, Executive Director. Mobile Loaves and Fishes*

CRM will also keep your Outlook calendar synched automatically, so if you assign yourself a task (to-do) it will show up in your Outlook To-Do folder. When you complete the task, it updates the CRM. Because most business productivity tools like Outlook seamlessly communicate with the CRM solution, all your data is captured for a full view of the relationship.

Now that you know that a CRM solution can fit into your way of working, why not have it collect or share information with other systems? If you are like most NPOs, you run many programs to meet the mission of your organization. There is key data in all of these systems that would benefit the development and major donor teams. And the reverse is true as well. Modern CRM solutions are open and extensible. This means there are a variety of easy ways to move data in and out of the system. The result is a more complete view of your constituents, volunteers, and staff, and a coordinated approach to advance your mission.

"We've been on a quest for several years for the holy grail of integration. We needed to integrate a multitude of platforms, including our tracking program and accounting software," said Alan Graham, Executive Director, Mobile Loaves and Fishes. "We're a multi-city, multi-state operation. Now, we can have people everywhere on this Web-based system and we're able to have, in a real-time sense, the most powerful and up-to-date data out there, period."

5. Banish the Bottlenecks

Tired of waiting to get what you want? If you have to go through a series of systems just to answer a simple question, your precious time is being wasted while the clock keeps ticking. But imagine having the power to easily "ask and receive" of your technology whenever the moment strikes.

Everyone wants "their" report. Often the system you have in place does not have that view, and to get that view would either be costly (pay someone to add it) or at the bottom of the IT staff or volunteers' work queue. With CRM, you can create your own reports, modify existing ones, and choose whether or not to share them. Maybe you don't even need a report – what you are after could be displayed in a filtered view of your data.

The commercial world has been automating processes and tasks for years through CRM, enjoying reduced error rates, reduced turnaround time and increased consistency and team efficiency.

With CRM capabilities like workflow you're always in the know and never again have to wait for someone to get out of the record before you can get in. You don't have to stand by for the part-time IT guy to fix something or the database manager to pull a report for you. And because anyone can use the system, work flows faster. It's your CRM, your data and your mission that is important, so choose to take control and put the technology to work for you.

WHERE CAN YOU GO WITH CRM?

Your organization's knowledge and relationships are its lifeblood. Your ability to strengthen the bonds of your relationships lies in your ability to know, understand, and interconnect those people at the end of the phone call, email, or Web site click. With CRM as a hub to keep you plugged in to each appropriate point of interaction both online and off, you won't risk starting the wrong conversation, wasting time deciding where to jump in, or missing out on the conversation altogether.

Ultimately, staying competitive and adaptable in an environment of limited donor dollars and shorter attention spans requires not only that your approach be well coordinated among the members of your organization, but also that it be flexible—that you are able to tell, in a timely manner, what's working and what's not, and be able to change your strategy accordingly. Only so much is humanly possible in a day. When it comes to combating inefficiency and missed opportunities, tireless determination gives you the hope to set those once-impossible goals, but the tools you use determine how long it will take to achieve them. Consider a CRM solution, and see how quickly those goals can become reality.

About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit **www.convio.com.**