Optimizing Donor Relationship Management Software

An Overview of Customer Relationship Management (CRM) Software

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Optimizing donor relationship management software

What is CRM software?

- A tool to manage relationships with new or potential donors
- Organizes donor information
- Keeps track of previous donations and donor engagements
- Supports overall donor relationship strategy

Photo by Viktor Talashuk on Unsplash

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Customer Relationship Management software (C.R.M. software) is used by many non-profits as a tool to manage relationships with new or prospective and existing donors. If your organization doesn't currently use CRM software, it can be a bit of a learning curve but there are many significant advantages. For instance, a CRM system provides a means of organizing donor information, including previous donations and values, which can help facilitate engagement with the organization, as well as allowing organizations to use this information to better inform their overall donor relations strategy.

We will provide examples of CRM software in this video, and we also include resources in the Workbook, including a resource through TechSoup.

Benefits of Using a CRM System

- Collect and analyze data about donations
- Make predictions about future donations
- Inform overall organization strategy
- Streamline donation process
- Central hub of accessible information on your donors
- Event registration tool
- Customizable
- Optimize operations (auditing, segmenting, automating, etc.)

The benefits of using a CRM include:
- Allowing organizations to pull and analyze data about donations (amounts, frequency, lapses in donations)
- Screening capabilities, which allow organizations to make predictions.
- Assists in informing overall organization strategy.
- It can very effectively streamline donation processes (i.e., receipts)
- It can provide a central hub of information that is easily accessible.
- And can also act as an event registration tool (and can be integrated with other external applications)
- And finally, is highly customizable for each organization's needs.

CRM systems can be configured and optimized in a way that seamlessly assists a non-profit in conducting its operations and building out its strategy. For example:
- Auditing data and integrating data processes
- Segmenting donors
- Automating manual processes (such as manual entry of information)
- Integrating other organization applications (calendars, marketing tools)
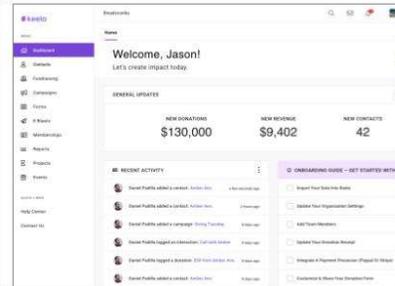- Providing training for those who want to use the system.

CRM Software

- Hubspot
- Keela
- Bitrix24
- Bloomerang
- Zoho

For reviews and more, visit
Capterra.ca
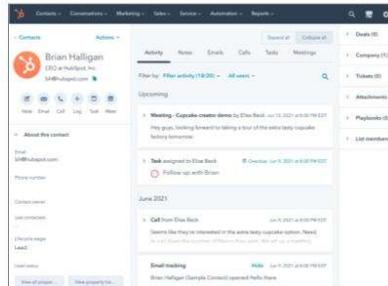
Hubspot

Keela

Bitrix24

Bloomerang

There are a number of free and low-cost CRM software that you can use to track donor information and communications. We provide some suggestions here. (Note that we are not endorsing or advertising any of these tools).

Hubspot CRM allows you to add & manage up to 2000 contacts for free. This is a US-based company, and their CRM is primarily designed for corporations and sales so needs bit of adjustment to be used for non-profits but can be an effective tool.

Keela CRM is a tool that was designed specifically for non-profits. This is a Canadian company that has a free version available, and the paid version is also very reasonably priced.

A few other recommended free or low-cost options: Bitrix24, Bloomerang, Zoho CRM.

Finally, the website Capterra.ca offers free, comprehensive reviews of different CRM options.

This video is part of the
Building Equity: Resource
Mobilization for Impact
training series.

The series is available online via the Spur Change Resource Library. Made possible in collaboration with JNC Consulting and Change the Game Academy.