



NONPROFIT CRM SELECTION CHEAT SHEET



Keep track of features and functionalities
as you search for a nonprofit CRM



Nonprofit CRM Selection Cheat Sheet

Organization Name:

Monthly Budget:

Development Team:

Setup Budget:

Decision Makers:

Desired Go Live Date:

How the Cheat Sheet Works:

As you explore nonprofit CRM software for fundraising and donor management, use this cheat sheet to keep track of the features and functionalities that are most important to your organization.

During vendor demonstrations and your internal assessments, enter a grade into the checkbox next to each feature. Add up your feature ratings in each section in the blue box and use the cheat sheet scoring to help you determine which vendor best meets your functional requirements. Use the following grading system >>

1=Weak, 3=Satisfactory, 5=Strong

Gift Tracking

- Recurring donations
- Stock gifts
- Gifts-in-kind
- In Memory/Honor/Tribute Gifts
- Split Gifts
- Planned Gifts (Bequests, Life Insurance)
- Matching Gifts
- Pledges
- Soft Credits
- Payroll Deductions
- Solicitor Tracking

Gift Processing

- Integrated Payment Processing
- Free Online Donation Page/Form
- Rapid Donation Entry Tools
- Batch Gift Processing
- eChecks/ACH
- Card Swipe Device for Events
- Accept All Credit Cards (No Hidden Fees)
- Automated Gift Acknowledgment Letters
- 24 Hour Bank Deposits
- Pre-Authorize Credit Cards

Events

- Peer to Peer Fundraising Platform
- Auction Check-in/Check-out
- Seating, Ticketing, Name Badges
- Inventory Management
- Social Media Sharing

Security & Logistics

- Cloud Hosting & Self Hosted Options
- Access Anywhere Via Internet Browser
- Import/Export to CSV/Excel
- Allows simultaneous login users
- Allows unlimited constituent records
- Provides Free Software Upgrades
- Provides Free Phone & Email Support
- Role Based Security
- Open Two Way API

Integrations

- Email Marketing
- Matching Gifts
- Wealth Screening
- Online Event Ticketing
- Accounting Integrations (Quickbooks)

Constituent Management

- Track Unlimited Contact Information
- Track Constituent Relationships
- Track Households
- Cultivation/Moves Management
- Task Reminders
- Notes/Communications Tracking
- Create Unlimited Custom Fields
- Segmenting/Grouping into Lists
- Track Volunteer Skills/Hours
- Manage Grant Process
- Manage Member Renewals & Fees
- De-Duplication of Constituent Data
- Constituent Search Tool

Fundraising/Communications

- Marketing Automation
- Email Marketing
- DIY Online Website Forms
- Social Media Publishing
- Mail Merge for Labels/Letters/Envelopes
- Targeted Direct Mail Fundraising
- National Change of Address (NCOA)
- Custom Online Forms (To Match Website)

Reporting

- Visual Dashboard Reports
- Lifetime Giving Report
- Outstanding/Fulfilled
- Donor Retention Rates
- LYBUNT/SYBUNT
- Donor Detail Report
- Event Registration/Attendee Reports
- Finance Summary Reports
- Campaign/Fund/Appeal Reports
- Event/Auction Reports
- Ability to Export to CSV/Excel
- Query/Report on all database fields

Features:

Gift Tracking
Gift Processing
Constituent Management
Events
Fundraising/Communications
Reporting
Security & Logistics
Integrations

Intangibles:

Other Unique Requirements
Look & Feel
Sales Responsiveness
User Reviews
Industry Reviews
Training/Education Offered
Speed of Implementation
Scalability

SUBTOTAL:

SUBTOTAL:

Total Grade: