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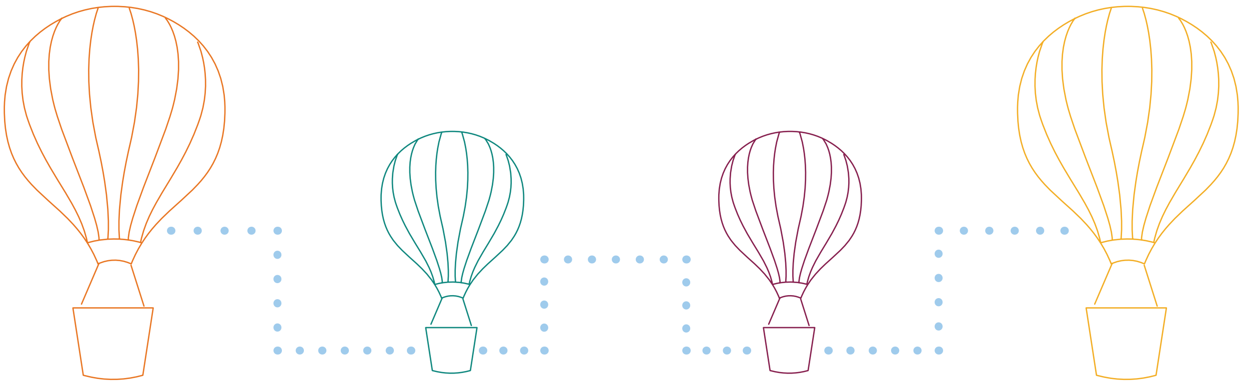

CRM for Nonprofit Relationships:

From Data Management to Meaningful Connections

Article 1

In Association With

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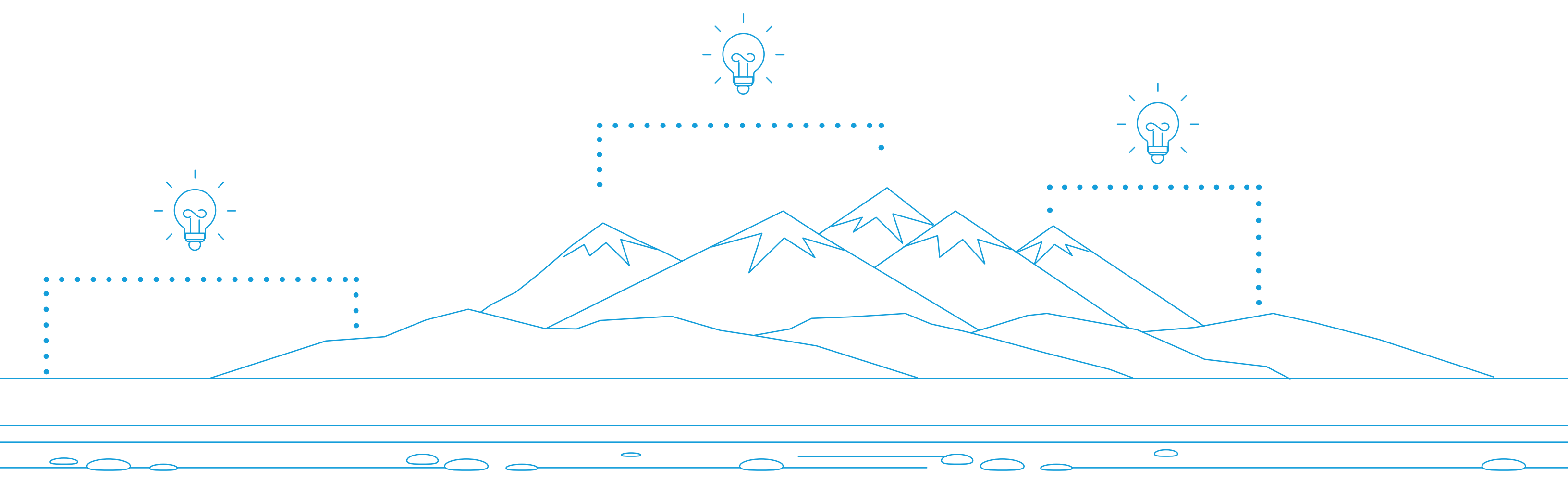

Intro: Constituent Relationship Management

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No matter your mission, people are the heart of your nonprofit and its work. Think about all the relationships your organization has – from all of the people you and your staff interact with to program participants, donors, volunteers, partners, event attendees, legislators, and more. Whether you're an executive director sitting down with board members, a development officer reaching out to longtime donors, or a junior staff member meeting with someone who just enrolled in one of your programs, you want those relationships to thrive.

Like all human relationships, these require effort to maintain and grow. Relationships are built on shared histories and experiences, and on talking and listening to each other. It's one thing to engage with people on the scale of friendships and family members, but another entirely for all the people with whom your organization and its different programs, departments, and roles interact.

You want to know as much as you can about each person and their relationship to your nonprofit so that you can, for example:

- Connect an activist to the cause they care most about.
- Give a loyal donor a heads-up about a new project that will help their community.
- Help a service recipient find out about a program they need, but didn't know you offered.

Maintaining relationships with hundreds or thousands of people means keeping track of a lot of information. Your ability to track and use that information can have a profound impact on your ability to meet your mission–and the people who help you in those efforts, both within and outside your organization. That's where Constituent Relationship Management, or CRM, comes in.

CRM is not about technology or software or even data, CRM is about people.

"It's all about the relationships," according to Lisa Sock, a long-time nonprofit staffer who is now a consultant helping nonprofits with fundraising, advocacy, and communications. "Using your data to build relationships should be a constant, ongoing effort."

"It's all about the relationships."

Constituent Relationship Management

You probably think of CRM as a system of software that manages an organization's most important data: information about how the organization interacts with people. But as Rabia Syed, the Director of Technology and Systems at Center for Popular Democracy, points out, CRM is much more than just software.

"A CRM is everything you use to move supporters toward action," she said. "The technology is just the most tangible piece of that."

CRM is a way to store data, but it's not about storing data–it's about using that data to build relationships.

In the past, most nonprofits used to gather all that information on paper–business cards, receipts, surveys, pledges, time cards–and throw it all in a box. When it came time to use that information, it was usually hard to find, and impossible to share efficiently. More sophisticated nonprofits might have used spreadsheets, which made it easier to find things, but harder to maintain–and likely that each staff member had their own set of data. If a constituent called to change their mailing address, not all staff might be notified of the updated information.

"A CRM is everything you use to move supporters toward action"

New to CRM?

If your nonprofit is still collecting most of your information on paper or in spreadsheets, or if you are unfamiliar with the concept of CRM or databases in general, you might want to start with a more basic overview. Here are some additional resources to help you better understand the world of Constituent Relationship Management.

You're probably not collecting information on paper anymore–instead, you're gathering data from a number of different sources in a number of different formats. Maybe you're even able to track and access that information through a centralized database. If you're able to store your most important information in a way that keeps it well-organized and accessible–and if you can access it when you need to–you're on the right path to grow your nonprofit's relationships.

That means more consistency in your data, fewer errors, and more efficient communications–and fewer constituents upset about mistakes. But that's only the most basic level of CRM success. Are you using the full power of CRM to better understand and improve your relationships and become more effective at your job?

CRM can be much more than a computerized Rolodex. If the people in your nonprofit use it thoughtfully, CRM can track relationships between people or projects across different departments, facilitate collaboration, improve communications and outreach, streamline powerful reports and analytics, and help you make predictions about future work and events based on historical information–just to a name a few.

There are other benefits, too. Data from a CRM can provide a deep view into your organization's fundraising and program performance–which, in turn, can provide insights that help your board make decisions that drive your organization forward, and that help make the case to funders that strengthen your support. It can help you identify and provide the new programs your constituents need, and help you focus on the areas where you have the biggest impact, which donors and funders will love.

Where are you in CRM Maturity?

Paper-Based
We have information.. paper based then digitized.

So Many Spreadsheets
CTRL-F is our best friend. Many versions of the partial truth.

Partial Point Solutions
We have software for donors, clents, marketing, and more.

Data & Transaction Management

Constituent Database
Donors, volunteers, advocates, clients and partners are in one system.

Connected Relationships
We track who is in which houshold, their employers, and more.

Automating Processes
We have automated internal workflows, tasks, and service.

Engaging Constituents
We use all of this data to segment, communicate & collaborate

Insights & Predictions
We gain insight through reports, dashboards, and predictions.

Constituent Relationship Management

What Are Common Nonprofit Uses for a CRM?

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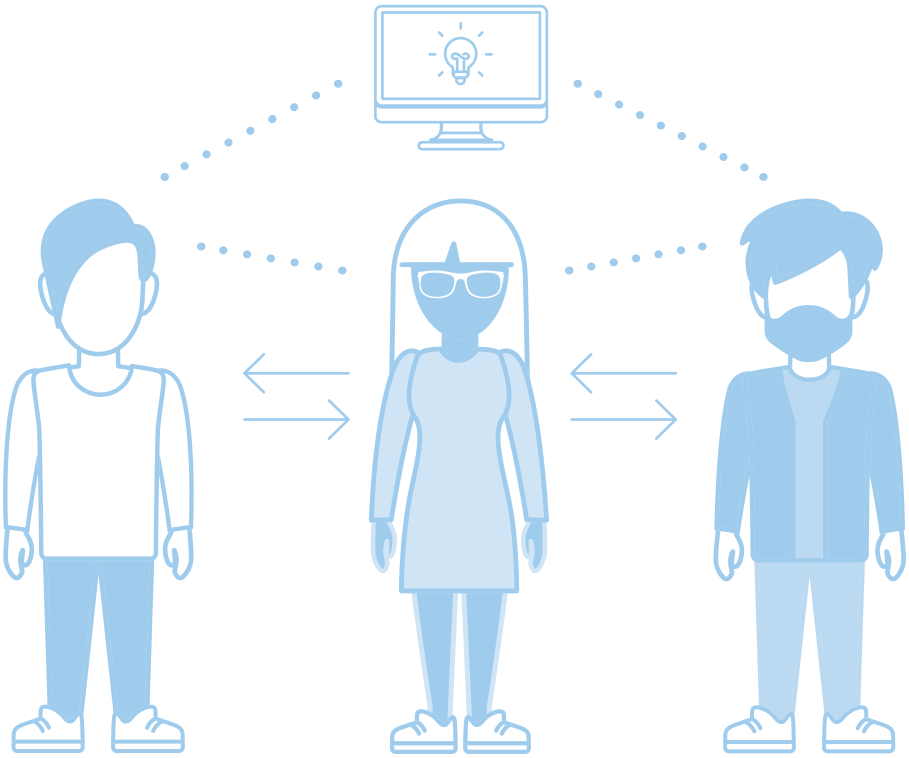
One of the great benefits of CRM tools is flexibility. Almost every nonprofit with a CRM uses it differently to meet their particular needs. An arts organization, for instance, might need to support membership tiers and event planning. An environmental advocacy organization might prioritize ways to engage supporters in online advocacy and tailored email communications.

Within each organization, people in different roles will also have different needs. To better understand the wide range of what's possible, consider the following examples of some of the most common nonprofit uses for CRM systems in building and maintaining relationships. You'll notice that in each case, the CRM provides benefits for the people on both sides of the relationship, inside and outside the organization.

Think about your organization's constituents, from program participants to donors to volunteers and beyond. Every person is different, and their needs may change over time. A volunteer may change how they want to keep in touch; a community member might need different services at different times in their life. Someone who once needed services might later pay it forward by becoming a donor or volunteer. A CRM lets staff across your organization know an individual's history with your organization, their information, and their preferences, no matter how they interact with you.



Cultivating Your Organization's Next Super Advocate

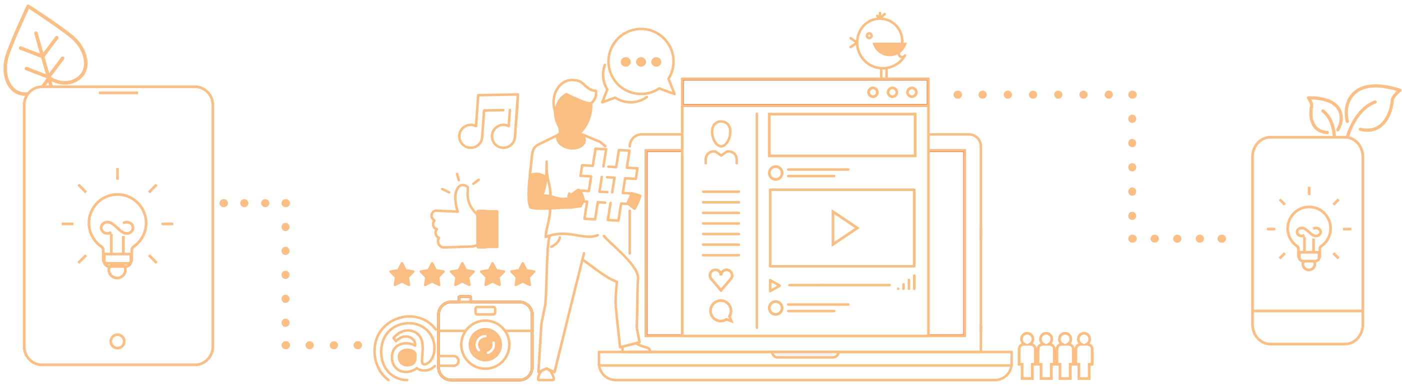
Focus: Communications Director & Advocate

Meet Raul, the advocacy and communications director at a regional environmental nonprofit. He wants to develop his supporters into better activists. To do so, he needs to prompt supporters to send letters to legislators about important issues, and mobilize his top activists to attend rallies and volunteer for door-knocking. He needs a CRM system that lets him see who has taken action and attended past events, so he can target them with appropriate next asks on the campaigns they care about.

Raul loves when he hears from a new activist that they had a great experience at their first lobby day, and that they never would have gotten involved in the campaign if not for his organization reaching out with the right ask at the right time.

Raul wants his CRM system to...

- ✓ Track each constituent's engagement with the organization, and score them to identify high-value advocates and donors who may be ready to do more (such as volunteering or giving at a higher level).
- ✓ Create segmented communications to turn out supporters to local events and provide opportunities relevant to their interests (which also helps avoid bombarding constituents with too-frequent or non-relevant communications – which doesn't help any relationship).
- ✓ Connect supporters' social media profiles and engage in social listening for better engagement across online channels, to better understand what supporters care about.
- ✓ Provide frictionless ways for activists to engage in online advocacy (such as emailing or calling legislators) and measure and report back on the results.



Stewarding Donors at All Levels

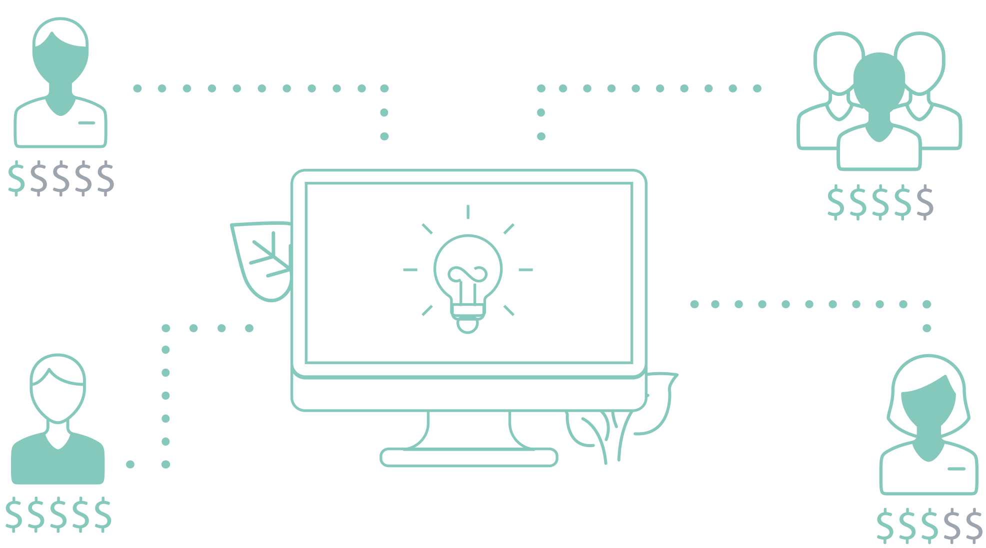
Focus: Development Director & Donor

Meet Cara, a development director who wants to cultivate donors at all levels–from identifying prospects to building strong long-term relationships with people who give regular or major gifts. She needs to report consistently on fundraising results and wants her CRM system to identify donors like Rebecca, who believes in the organization's mission and has donated for years (but inconsistently, and in varying amounts). Cara needs the tools to help her share with Rebecca what her donations have accomplished, and a workflow that will help her keep in regular contact in order to develop Rebecca into making consistent, annual mid-level gifts.

Rebecca loves that Cara checks in to let her know how their support has made an impact, which makes her feel like an active part of the organization's mission. Cara loves seeing Rebecca's profile and relationships in the CRM system show that she's attending events getting more and more involved in the organizations' work.

Cara needs her CRM system to...

- ✓ Segment supporters based on donation history–and easily analyze this data and use it to upgrade them (from non-donor to donor, occasional donor to monthly donor, or mid-level donor to major donor, for example).
- ✓ Use an individual's lifetime giving history to personalize donation asks with appropriate amounts.
- ✓ Streamline the online donation process and provide tools to let monthly donors manage their own recurring gifts, without jumping through hoops.
- ✓ Create workflows for engaging with and building relationships with major donors and prospects in a way that feels authentic.
- ✓ Identify hidden opportunities to connect with likely high-value donors.
- ✓ Manage grant applications and simplify the application process with quick, easy reporting on organizational metrics and results, saving staff time and ultimately securing more funding.
- ✓ Automate common or repetitive tasks such as acknowledgement communications, so donors always feel properly appreciated.



Creating a Constituent Community

Meet Veronica, who works at an organization that helps provide services and guidance to children with epilepsy and to their families. Many of the parents in her programs tell her they'd like to connect directly with other parents of children with epilepsy for advice and mutual support. Veronica's organization needs its CRM system to facilitate direct connections through a member directory, social media, and discussion forums–it also needs to let staff and volunteer moderators play a role in fostering positive community.

Veronica loves hearing from parents that they've made a connection through the online community that helped them feel less alone in their efforts. And her staff love that their community has saved them time in supporting their constituents.

Veronica wants her CRM system to...

- ✓ Create communities for constituents to engage with and support each other online
- ✓ Allow clients to manage their own information and apply for courses or programs.
- ✓ Engage with their case manager through online portals.
- ✓ Connect community activity to their other interactions with the organization staff and marketing efforts.

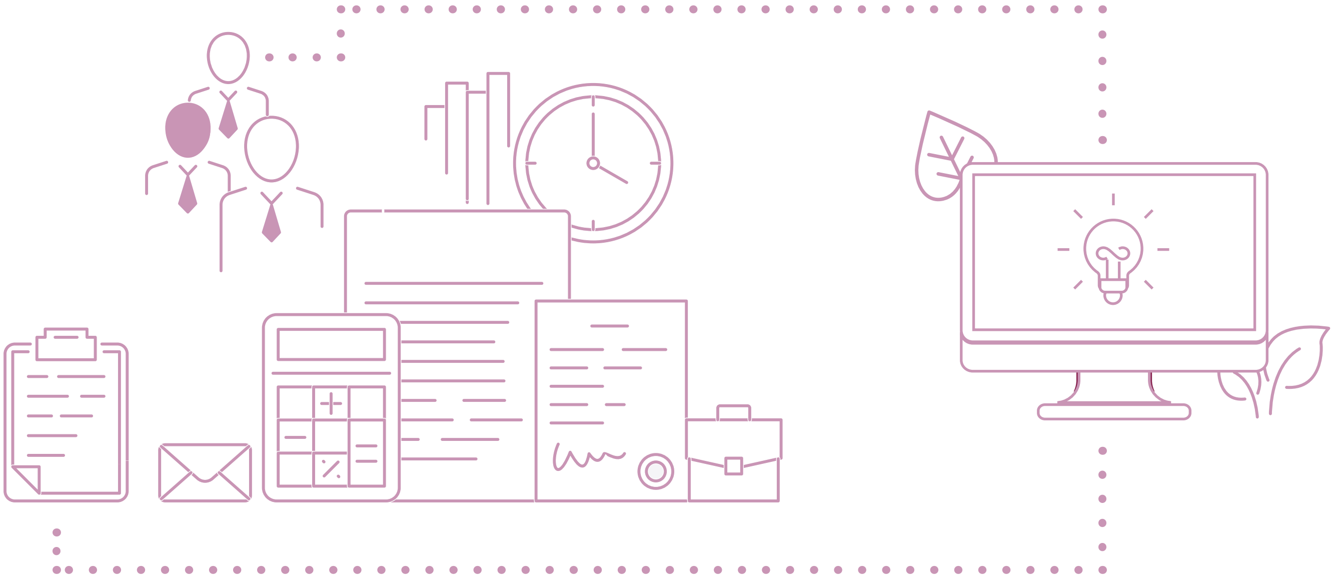
Reporting to Executives, Board Members, and Funders

Focus: Executive Director to Board Member

Sheila is the executive director of an organization that provides training and support for military service members re-entering the workforce. She wants a dashboard that shows her how the organization is doing on fundraising and constituent services by letting her see trends and drill down to investigate further when she sees something of interest or concern. Her board members don't need the same level of detail, but Sheila wants to provide them with a monthly report, by email, that tells them everything they need to know about the organization's health, so they feel confidently informed. Sheila loves when she has a call with a board member and they feel fully engaged and informed, thanks to regular reports from the CRM system, so their conversation can dive straight into how to improve their work.

Sheila wants her CRM system to...

- ✓ Track and easily report on the most important measures of success, such as revenue from donations, grants, and other sources.
- ✓ Track and easily report on the impact of programs, such as number of cases completed and the results provided to constituents.
- ✓ Share consistent, regular reports on the organization's health with staff and board members, so they can use that information to do their jobs better.
- ✓ Generate similar reports for funders to simplify the process of reporting back on results, allowing more time to focus on the mission.
- ✓ Analyze the organization's performance to support strategic, data-driven decision-making when making plans for the future.



Facilitating Collaboration Across Departments and Staff

Focus: Programs Staff and Client

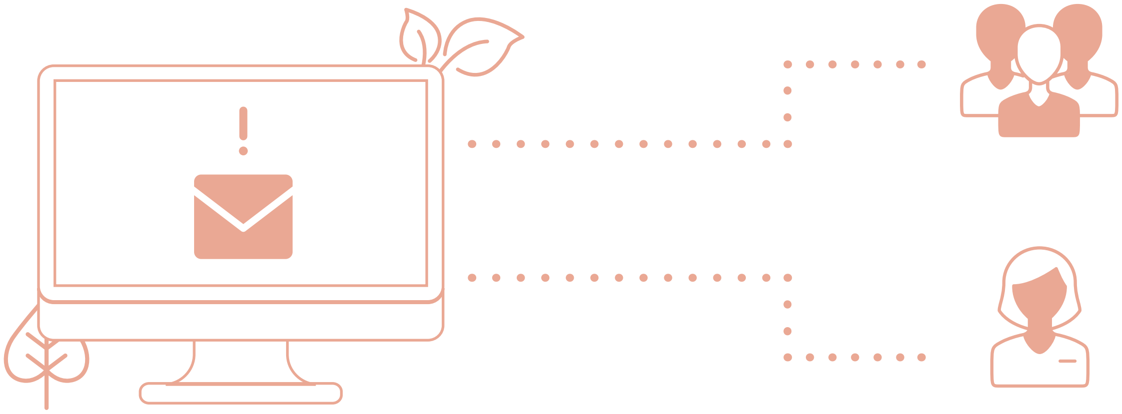
Meet Lena, a counselor who coordinates care and services for clients in her caseload at a refugee resettlement agency. Nizar is her client, and many of her clients like him are also enrolled in classes through other departments in the organization, so she needs to maintain a single CRM record for each individual that includes all their case notes, class enrollments, and scanned paperwork. It also needs to link to family and household members' records, so she can communicate about their whole family's needs where appropriate. While she often needs to share status updates with colleagues or confirm enrollment and contact information with external agencies, she also needs to respect her client's privacy and keep some of the data secure. The CRM system must let her choose what data to share.

Lena loves when her clients like Nizar feel comfortable coming to her with their needs, because they trust that she knows them and their history and is there to help.

She also loves the fact that her colleagues and partners are all working together with the right information to be productive.

Lena wants her CRM system to...

- Automate common processes and workflows (such as notifying the appropriate staff member when it's time to follow up with a constituent) so no constituents ever slip through the cracks.
- Centralize information about the organization's constituents and clients–if multiple staff are contacting a constituent, they can work from the most up-to-date information, as well as coordinating and sharing outcomes.
- Manage relationships between constituents (for example, family members or people living in the same household).
- Provide some information about a client to staff or external partners while keeping sensitive information private.
- Manage client cases and use streamlined workflows to provide consistent service to clients.
- Act as a knowledge repository in the event of staff turnover, smoothing over the transition process.



Conclusion

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Creating Great Experiences for Staff and Constituents

At its best, CRM makes aspects of staff members' work frictionless and efficient. Engaging with constituents should be easy–a good CRM tool will eliminate obstacles to the work rather than creating them.

"Using your data to build relationships shouldn't be arduous," Lisa Sock said. "Engaging with constituents shouldn't be a huge effort for your team."

Remember, relationships work two ways. Constituent Relationship Management done right can make constituents feel that the organization sees them as a whole person. For example, if a major gift officer calls a donor to talk about this year's gift, the CRM system can show them that the donor recently attended a lobby day, presenting an opportunity to acknowledge and thank them for everything they do for the organization–not just donating. But CRM should also work for your staff. Your organization can spend months choosing the right system, implementing it, and customizing it for your needs–but if your staff perceives it as a burden on their time or an extra, unnecessary step in their work, they're less likely to use it, and your nonprofit won't reap its many benefits for your mission.

"You need to sell staff on the value of sharing their data in a centralized place," said Peter Churchill of Bridge Farm Consulting. "Otherwise, they'll go back to using Excel."

> "Engaging with constituents shouldn't be a huge effort for your team."

How do you convince staff of CRM's value to them, and ensure they use the software to its full potential, making it easier for them to do their jobs? Training is critical, and a good place to start–but there's no silver bullet.

It takes time and care to create a culture around using CRM. Start by showing staff members tangible examples of how CRM can make their work better, like the examples above, and share stories of success from within your organization. Also, find leaders throughout the organization to set good examples and serve as ambassadors for effective CRM. Staff from the IT team all the way up to the executive director can play a role in making CRM use a valued part of the organization's culture.

These are far from the only ways to use a CRM system. Nor are the given uses exclusive to each example–an organization might want to use CRM in several of these ways. In the coming months, we'll be taking a closer look at each of these examples by spending some more time with the people to see how CRM can make their interactions with people stronger, more engaging, and more effective.

Unlocking the Value of CRM for Your Organization

The first step to making CRM work for you is evaluating what your organization needs. We've listed many of the most common uses above, but think deeply and creatively about all the areas of your work that could benefit from more consistency, centralization, or automation. If you're already using a CRM system to manage your contacts, think deeper, beyond the data and technology, about what's needed to build stronger relationships in all aspects of your work.

Decide what success means for you. Then decide how you will measure that success. Try to be specific–consider key metrics, such as dollars raised, the number of activists who attend rallies, or the number of clients served and the the outcomes they experienced due to your programs, instead of such vague goals as "serving more people"–but always come back to the people and the relationships: what information will allow you to better engage with your constituents, and how will you use it? Don't forget to consider internal metrics, such as reducing staff time spent on time-consuming, repetitive processes, which will make your organization more effective. And be prepared to be flexible: maybe what you need is not a new piece of software, but a new internal process, like maintaining a shared communications calendar to coordinate when constituents hear from you. This can all be part of thinking about CRM.

These needs will help lead you to the right tools to help you accomplish those goals. As you embark on setting up a new CRM system, make sure you keep those big-picture goals and specific metrics in mind and take the time to focus your system on collecting, organizing, and reporting on the metrics that will help you do your work more effectively.

What Types of CRM Systems Are Available?

When it comes to choosing software for CRM, there are many options out there. Some all-in-one CRMs, such as Salesforce, aim to be the only piece of software you need, letting you pick and choose among sets of features. Others may specialize in specific areas, including the following:

- Donor management
- Volunteer management
- Case management
- eCRMs (which include some or all of the online toolset, like donation forms, email, and online advocacy, but little support for offline activities)

Look for software that meets your current needs and offers room to grow, without a lot of extra features your organization won't use. If you're combining multiple tools, look for automated integrations so that your data smoothly transfers between systems and your view of the data is always up to date. It can be hard to choose between tools, so talk not only to software vendors, but also to your professional network to hear first-hand how specific tools have worked for other organizations. Finding a system that works for your organization, one that your staff will embrace, is more important than the specific technology.

Always customize a new CRM to meet your organization's needs, and make sure it includes all the information you need to build relationships and measure your work against your goals as discussed above. For very specific needs, unusual use cases, or advanced projects, you might want to invest in custom development to add features that address your specific needs, so you can fully support your work. "The technology should support the people in your organization," Rabia Syed says–"not the other way around."

"The technology should support the people in your organization, not the other way around."

When you're implementing a new CRM, the results you get out of it will be only as good as the effort you put into it. Take the time in advance to collect, clean up, and organize your existing data before importing it, and train staff to use the system, from entering new data consistently and accurately, to showing how they can use it to better accomplish their work. A little extra effort up front will save your staff a lot of time as you begin to use your CRM, and help ensure you're getting the most out of it–otherwise, you're just stuffing papers into an expensive cardboard box.

Interested in learning more? Visit our Small & Growing Nonprofit Page to discover how to build thriving relationships with your nonprofit and staff.

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Idealware, a 501(c)(3) nonprofit, provides impartial, thoroughly-researched, and easy-to-understand resources to help nonprofits use technology to create greater social impact in our communities. They help you make smart technology decisions so that you're able to do your best work on a limited budget. Learn more about Idealware.

This article was a partnership between Salesforce.org and Idealware to provide more resources to small and growing Nonprofits on how to use CRM from a human-centered approach

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