

Powering your fundraising programs

Five questions to ask before investing in a CRM

Now more than ever, institutions are counting on their advancement departments to cultivate, engage, and manage donor relationships. So it makes sense that constituent relationship management (CRM) solutions have gained widespread use. But how do you choose the right CRM, and how can you help prepare your institution for the change?

Consider the following:

1



Should we choose an all-purpose or a higher ed advancement-specific CRM?

Get all the capabilities you need and ease user adoption with a system designed for your advancement-specific needs. And be sure to select a technology partner who'll support your process from initial evaluation to go-live and beyond.

2



How will the CRM integrate with our existing and future technology?

Look for a CRM that will pull in data and act as a central hub for information and activity across applicable solutions. Think beyond existing systems and make sure that the CRM can provide the flexibility to remain viable for the future as your needs evolve.

3



Is the system configurable to our unique business processes?

CRM implementation is an ideal time to review existing practices and introduce streamlined business processes with software automation. Select a CRM that will allow you to rebuild your business processes to enhance efficiency and accelerate adoption.

4



Why should we move to the cloud?

Why own, manage, modify, and maintain an application if you can get the latest and greatest on demand? Moving to the cloud will also help you harness the full potential of your data to inform strategic decisions, and remove technological barriers to progress and innovation.

5



What are some best practices for managing change?

Before implementing, define who owns which data and understand how the CRM will integrate with your existing systems. The success of a CRM project often depends on employing positive change leadership strategies very early in the process.

Focus on relationship management

An effective CRM solution allows you to track and manage donors throughout the lifecycle. By incorporating data-backed insights into your advancement strategies, you can build stronger relationships with your constituencies and enhance your fundraising efforts to meet institutional goals.

— Read our ebook —

to learn how to prepare your advancement team for successful CRM adoption.



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