

# How to Buy Fundraising Software

**Find your path to growth.**

# Intro



## What does “Mission Accomplished” Mean to You?

Before delving into features, ask yourself: How can fundraising software help you achieve your mission?

Your mission is uniquely set apart by the incredible people who support it: you, your staff, your volunteers, and your nonprofit's lifeblood - your donors.

There are so many software solutions, but only one will be the right fit.

The solution you choose to manage fundraising campaigns and donor information should be tailored to help your staff work efficiently and energize, engage, and grow your donor base.

So instead of starting with product details and checklists, let's begin with you.

## Tasks, Tangles, and Never-Ending To Dos: Finding Your Path to Simplicity

What are your goals? Forget about the daily have-to-dos for a moment and think about what you want to do.

### Specifically, what would you love to achieve within twelve to eighteen months?

#### Goals can include:

- Gain insight into donor data
- Improve online fundraising
- Engage and develop donors
- Boost revenue from fundraising events
- Improve donor retention

### Once you determine what you really want to accomplish, ask yourself, What's keeping you from achieving your goal?

Focus your time and resources on your most valuable initiatives. Invest in automation and organizational tools that let technology take over on the-day-to-day tasks that pull you and your staff members away from your organization's big picture initiatives.



## **If you could make anything easier, what would it be?**

Is recording and acknowledging gifts dominating your staff's time? If so, consider integrated gift processing a "must have" when evaluating fundraising software solutions. If keeping track of grants is a hassle, then a system that simplifies grant management is key.

**Any systems not built to eliminate the tasks that take you away from focusing on your goals can be immediately crossed off your list.**

## **Chart a Path for Your Goals to Grow into Accomplishments**

Don't settle for a system that stops at the basics. No matter how steadfast your goals are, the tools you'll need to reach them will inevitably change as your organization grows and the fundraising landscape evolves.

That doesn't mean you need to spend lots of money on a bells-and-whistles system that's packed with features you might not ever use.

**Instead, start with a strong core system that you can customize according to your goals as you grow.**

## **Your Goals Can Only Be as Successful as the Network that Supports Them**

Never underestimate the value of services designed to ensure you're set for success from the moment you purchase your software and beyond. Check out the following breakdown of offerings you may want to consider when evaluating fundraising solutions.



# Setup

When you invest in fundraising software, it's important to start off on the right foot. A thorough setup and configuration of your software system is needed to make sure your data is properly transferred, and the fields and functions you'll depend on are set up to your organization's specific needs.

**As you investigate, be sure to ask specific questions about setup, like:**

- Do you have an expert implementation team that delivers full data conversion?
- How long is the implementation process?
- Do you offer a consultation to fully customize my system to my needs?





# Training



Training is essential to maximize your investment in fundraising software. No matter how intuitive a system may be, there are always a few questions, tips, and tricks that a training professional can help you with so you get started on a solid foundation.

## Options and pricing will vary from product to product, but make sure you consider:

**Online and webinar training:** An instructor connects live to your computer and provides you with step-by-step instructions and best practices on how to use your system. These online and webinar training sessions can be private or public. Find out pricing and format to decide which is best for you.

**In-person training:** An instructor travels to your place of business to walk you through features and processes one-on-one. You can meet with an instructor individually or choose to have additional staff members attend. This option is typically more expensive than online and webinar training.

## It's important to make sure that the company you're choosing goes beyond training basics by providing:

- **Expert webcasts** - Attend online learning sessions hosted by industry experts.
- **CFRE certification** - Obtain certification for fundraising professionals who demonstrate the knowledge, skills and commitment to the highest standards of ethical and professional practice in serving the philanthropic sector.
- **An interactive online community hub** - Connect with other nonprofits, review your support case history, learn new features, and discover (and provide) useful tips and best practices.

An account representative should be able to provide you with everything you need to know about training options and work with you to determine which type of training is best for your team and your budget.

What level of support are you looking for? Support options typically include telephone, email, and chat.

# Support

## Be wary of software solutions that don't offer phone support.

When you're in a time crunch and need a quick fix, having an expert a phone call away is critical to getting things done. Phone support is also helpful when you want to tackle a complex issue that requires a conversation.

## Know you're not alone.

You want to work with a partner that has helped tens of thousands of fundraisers overcome the obstacles and challenges of the job. Look at customer review sites to see what customers say about a company's support services.

## Learn from community of your peers.

Are you able to interact with other professionals to ask questions, share tips, and learn best practices? It's a good idea to look into the network that your fundraising software partner can provide, so you can connect, collaborate and engage with fellow members of the nonprofit community.







## **Don't Fall for an All or Nothing Contract!**

**Flexibility on pricing and contracts is paramount to ensuring that you'll always be making an investment that fits within your budget.**

A quality solution shouldn't require a long-term contract, because your satisfaction will cause you to want to keep your subscription. Be wary of any solution that would trap you in for the long haul. You want to choose a solution you couldn't imagine living without, contract or not.

**To evaluate fundraising systems based on core and expanded offerings, download this free checklist.**

**Download  
Your Checklist**



## Make Sure You're Getting The Real Deal.

Knowing who you're working with is equally important as knowing what you're working with.

The following are a few steps you can take to help you feel confident that the company you're placing your trust in will be there in the future to support your software investment.

### **Does the company have a strong reputation?**

**Here are some questions your research should answer:**

What's their history of developing solutions for nonprofit professional fundraising and donor management?

Have they only recently started making products for this market? (It's in your best interest to seek out a company that thoroughly understands the nonprofit community through years of experience serving it.)

What relationships does the company have with other companies in the fundraising software market?

Are they affiliated with any nonprofit professional organizations?

Does the company have any certifications with other well-known companies?

Are they financially secure? You want your vendor focused on you, not shareholders or venture capital funds.





## **Do your homework. Read The Consumer's Guide to Low-Cost Fundraising Systems.**

Independent nonprofit organizations NTEN and Idealware partnered to conduct a comprehensive study of 32 fundraising solutions designed for small to medium-sized nonprofits that ranged in price from just a few hundred dollars to nearly \$6,000 per year.

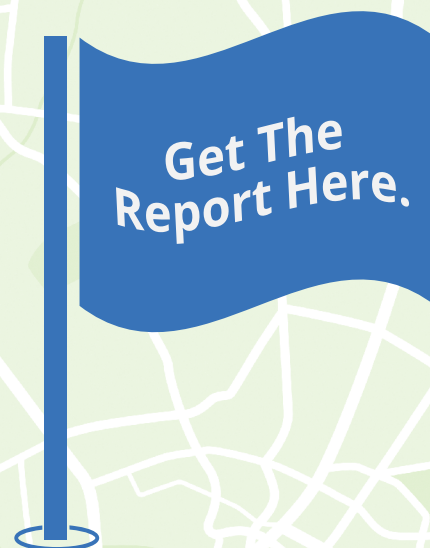
The 32 systems were narrowed down to 11, based on which systems possessed the best combination of functionality, price, and popular features most requested by nonprofits.

Each of the 11 systems was entered into an apples-to-apples comparison to equip nonprofits with a simple, straightforward way to determine which solution would best meet their needs and budget.

The authors of this report spent over a hundred hours meticulously researching the top systems, so nonprofits can make the best informed decision when purchasing fundraising software.

## **Get your key stakeholders on board with fundraising software.**

Making a major purchase decision requires collaboration and coordination with key stakeholders throughout your organization: IT staff, development, volunteer managers, executives, and most importantly, your board. Whether you're a smaller nonprofit needing approval of your board or a larger nonprofit looking to get the go-ahead from the members of your development team, it's crucial to obtain the buy-in and participation of your key stakeholders when making such an important decision for the future of your organization.



# 3

## Steps to Getting Buy-in From Stakeholders.

### 1

#### Make sure everyone is in the know.

Gaining alignment across multiple groups is an exercise in communication. You need to keep them informed from the start.

### 2

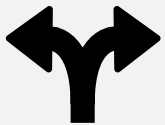
#### Give goal-based reasons why you're looking to buy.

Define why you're looking at fundraising software by listing the goals you're trying to accomplish and the challenges you're working to overcome.

### 3

#### Show and tell.

Ask the companies you're considering to provide you with shareable material that can enable stakeholders to make informed decisions around the question of purchasing one system over another or the benefits of fundraising software as a whole.



## Which Route Would You Like To Take?

The journey to reach your goals may have many roads, so it's crucial to invest in fundraising software that can accommodate and accelerate successful outcomes. Be sure you choose a system that will support whatever success means to you.

Don't let bells, whistles, and fluffy features distract you from why you're evaluating software in the first place. Go for the goal!