Engagement: How to Pick the Right Software to Grow With

There are many software options out there that will help you receive donations, gain new advocates and communicate with those who join your efforts. Picking the right one can be overwhelming. I mean, who the heck knows what CRM means, right? Use this worksheet to understand what you should be looking for and where to start looking.

ESP +CRM = <3

Ok, it's about to get technical and boring. Stay with us. Email Service Providers (ESPs) are the programs marketers use to design emails, manage campaigns and assess campaign performance. A Customer Relationship Management (CRM) system manages all of your organization's relationships and interactions with existing and potential donors. You can use these softwares together or separately. Our advice is whatever you go with, make sure the data you get in one area talks to the data you get in another.

It is likely that no single software will fit all of your wants and needs, especially if you are a nonprofit on a budget. That doesn't mean a software can't get you a lot of what you want. An ESP, for example, can help you send out emails or text messages, set up automated emails, test two different versions of an email to see which language is resonating and provide analytics to help you optimize your impact. A CRM, for example, can help you collect donations, host community forums, develop an app for your services, help you accelerate your advocacy efforts through letter-writing campaigns or petitions, and track the user's journey to help you better understand how your users are taking action.

In other words: ESP and CRM are kind of awesome and can be super beneficial for your organization. Use the section below to prioritize a list of what you're looking for before talking to a representative or doing a demo.

List the top five things an ESP and CRM need to have:

1. _____

2. _____

3. _____

4. _____

5. _____

What would be nice to have in an ESP or CRM?

6. _____

7. _____

8. _____

9. _____

10. _____

TLDR: If you're someone who likes to be over-prepared, we pulled together a list of things we asked as we were making a decision for our organization. This is not an exhaustive list and not all will apply, so take what you need and leave the rest.

Accepting donations

- What payment processor does your software accept and will the new system integrate with it?

- What are the processing fees associated with that payment processor?

- How will the payment processor integrate with our website, if at all?

- How does your software help us track donors?

- Does your software allow donors to create recurring donations?

- Does it enable us to contact our donors?

- What analytics tools do you have and what will it tell me about our donors?

- Will we be able to create ticketed events where people can donate directly to us?

Sending out emails and texts

- How easy is it to build an email if we've never done it before?
- How big can our email list be?
- What tools does the software have to help me delete users who are not opening my emails or gave us an email that is bouncing?
- Do we have the ability to send out automated emails and email series?
- Will our audience be easy to segment?
- What analytics tools do you have and what will it tell me about the emails we're sending?
- Does this software integrate well with the software where I collect my donations and manage our organization relationships?
- Does this software allow us to text contacts?
- Does this software allow us to customize emails, or do we need to follow a standard format?

Peer to peer functions

- Will contacts be able to create their own fundraiser and send it to their friends and family?
- Is there the ability to create forums where people can have two-way conversations?
- Will volunteers be able to host events on our behalf?

Legislative advocacy

- Will we be able to create petitions, and how will we export the names on the petition?
- Will contacts be able to reach out to their state or federal legislators through this software?
- Will contacts be able to tweet thanking their state or federal legislators?
- Will contacts be able to call their legislators through this software?

Pricing and onboarding

- Will the price increase as our list of contacts grows?
- Is it a monthly or annual rate?
- Is there a setup cost?
- What tools do you have to help onboard the team on how to use the software?

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