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BB

FUNDRAISING STRATEGY

CRM Platforms and Donor Relationship KPIs

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1.1

CRM PLATFORMS

Introduction

Definition

CRM (Customer Relationship Management) softwares are tools that help organizations collect, track and manage data on donors, volunteers, staff members, and projects. Such management leads to better relationships that help NGOs and Nonprofits build more engaging and reliable connections.

Purpose

Since CRM is not just a business tool, NGOs and Nonprofits must take due advantage of the power of such tools for the following reasons:

1. **Effective Data Collection and Visualization**
Broader view of sourced information helps plan ahead and better evaluate trajectories
2. **Leverage automation power**
Reducing routine tasks with process automation helps free up rather significant time for better research
3. **Management through KPIs Analytics**







CRM softwares come with capabilities that integrate operational KPIs and even customization options for a more organization specific approach

Method

In order for Zartonk-89 to get on board the process of utilizing a good CRM platform, this document provides a list of 6 CRM platforms that specifically cater to the needs of NGOs. The list has been shortlisted based on the features provided, the user base, user reviews and pricing plans.

Two additional platforms are also suggested which have limited features but are highly economical and cater to the needs of NGOs just starting out. The platforms mentioned are hyperlinked from this document.

The CRM Platforms

| | | |
|---|--|--|
| CivCRM <hr/>  | Monday.com <hr/>  | Salesforce <hr/>  |
| Zoho CRM <hr/>  | Bloomerang <hr/>  | NeonCRM <hr/>  |

1. CiviCRM

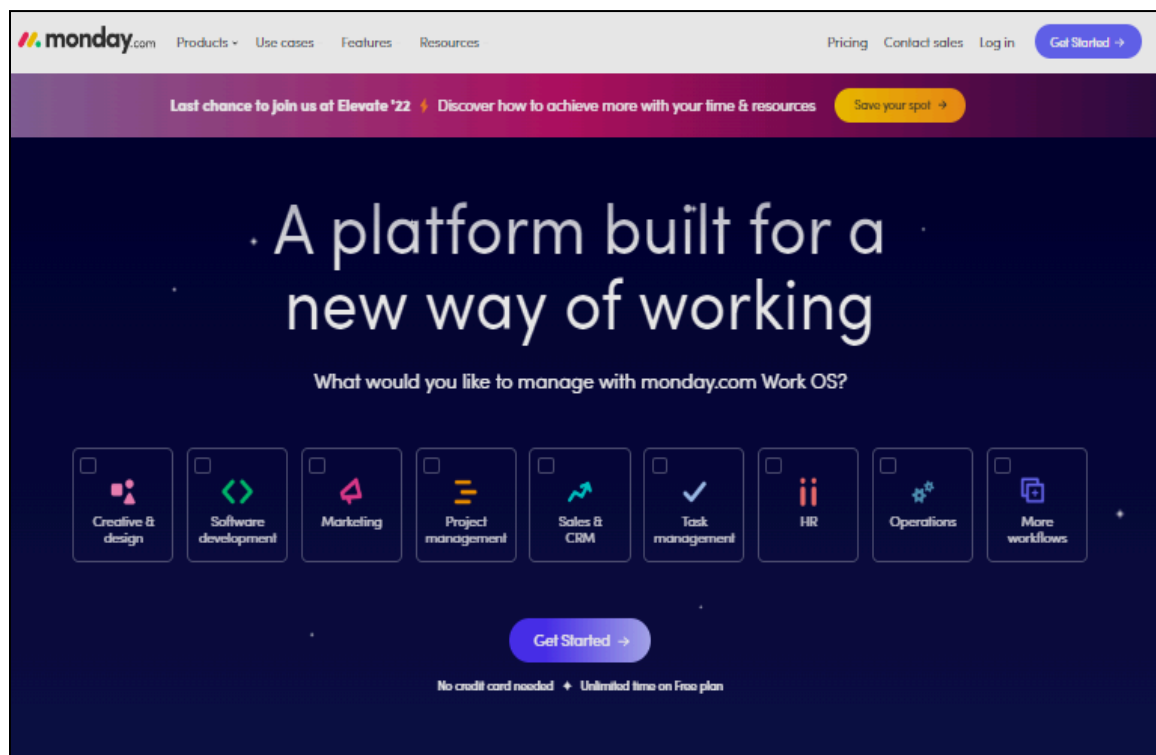
| | |
|--------------|---|
| About | An entirely customizable CRM software aimed specifically at non-profits, NGOs, civic sector and mission based organizations. |
| Top Features | <ul style="list-style-type: none">a. Accounting integrationb. Case Managementc. Membership Management with excellent integrations <p>For more details visit this. (a snapshot of the website has been attached below)</p> |
| Platforms | Web only |
| Pricing | Basic @10\$ US, Standard @25\$ US with free trial |
| User Reviews | 4.2/5 Based on customer ratings as per websites such as getapp.com |



The screenshot shows the CiviCRM website homepage. At the top is a navigation bar with links: About, Events, News, Get help, Extensions, Support CiviCRM, and My account. Below this is a secondary navigation bar with the CiviCRM logo, and links: Explore CiviCRM, Find an Expert, Demo, and Download. The main content area features a large background image of a crowd with hands raised. Overlaid on this is the text: "BUILD, ENGAGE, AND ORGANIZE YOUR CONSTITUENTS". Below this, it says "Get the powerful open source CRM used by more than 11,000 non-profits." There is a green button labeled "Explore CiviCRM". At the bottom, there are three green checkmarks followed by the following text: "Centralize constituent communications", "Build and manage your donor base & membership", and "Full integration with WordPress, Drupal, Joomla & Backdrop."

2. Monday.com

| | |
|--------------|---|
| About | A project management-first tool specializing in collaboration, has pre-built templates & supports nonprofits by giving eligible-organization discounts. |
| Top Features | <ul style="list-style-type: none">a. Marketing automation centerb. Entirely custom-built templates for better adaptationc. Seamless workflowsd. More powerful dashboards. <p>For more details, visit this. (a snapshot of the website has been attached below)</p> |
| Platforms | Web, Android, iOS |
| Pricing | Starts free (limited usability), special pricing for qualifying nonprofits |
| User Reviews | 4.6/5 Based on customer ratings as per websites such as getapp.com |



3. Salesforce CRM

| | |
|--------------|---|
| About | Salesforce Nonprofit Success Pack (NPSP) offers support for fundraising campaigns, general donations and grants. |
| Top Features | <ul style="list-style-type: none">a. Straightforward data collection toolsb. Free add-ons for nonprofits. For example, <u>advanced reporting</u> provides a detailed account of contacts, campaigns and so on.c. Automatic third-party app data synchronization <p>For more details visit this. (a snapshot of the website has been attached below)</p> |
| Platforms | Web only |
| Pricing | Starts free (limited usability), pricing as per need of service |
| User Reviews | 4.7/5 Based on customer ratings as per websites such as getapp.com |

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START MY FREE TRIAL WATCH DEMOS

Learn what Salesforce can do for you.

What is CRM?
CRM stands for Customer Relationship Management.
[LEARN MORE >](#)

Grow your small business
Find, win, and keep more customers using the small business platform that grows with you.
[LEARN MORE >](#)

What is Salesforce?
The #1 CRM can unite all your teams and drive growth.
[SEE HOW >](#)

4. Zoho CRM

| | |
|--------------|--|
| About | Offers core pipeline functions helpful for process management, features to organize fundraisers, manage donors and volunteers. |
| Top Features | <ul style="list-style-type: none"> a. Customized user portals b. Automated email and social media marketing campaigns c. Extensive integration with 300+ applications <p>For more details visit this. (a snapshot of the website has been attached below)</p> |
| Platforms | Web only |
| Pricing | Starts free (limited usability), US \$14 per user per month |
| User Reviews | <p>4.3/5</p> <p>Based on customer ratings as per websites such as getapp.com</p> |

CRM

Features - Pricing Solutions - Customers - Resources - Bulletin -

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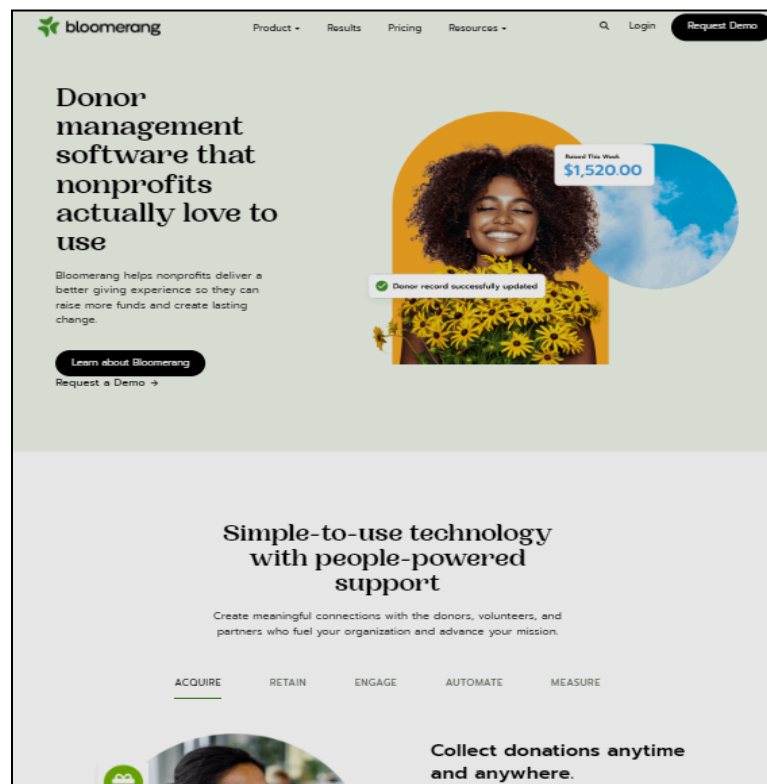
Build excellent customer relationships

Engage with customers through the right channel at the right time and with the right message. Harness the power of omnichannel presence, segmentation, KPIs, predictive intelligence, and more to deliver personalized experiences that breed loyalty.

[Read More](#)

5. Bloomerang

| | |
|------------------------|---|
| About | Bloomerang comes with a simple donor database solution built around the practices for nonprofits to decrease donor attrition. It pools the knowledge of leaders in the nonprofit world and guides the NGO accordingly. |
| Top Features | <ul style="list-style-type: none">a. Constituent timeline with visual representation and an interactive dashboard.b. Website integration, donor engagement surveys and smart reportsc. Social media update and updates from change of address database <p>For more details, visit this. (a snapshot of the website has been attached below)</p> |
| Platforms | Web, Android, iOS |
| Pricing | Plans start at \$99 per month for 1000 records. Registering any day before Jan 2023 gives free service till Jan 2023. They have a 'Use Now, Pay Later' model as well. |
| User Reviews (Overall) | 4.7/5 Based on customer ratings as per websites such as getapp.com |



6. NeonCRM

| | |
|--------------|--|
| About | Neon CRM is a cloud-based nonprofit software suite that has over 5000 non profit clients. NeonOne platform extends Neon's nonprofit solutions beyond a CRM. The platform includes options for peer-to-peer fundraising, event organization, case and program management, and payment processing. |
| Top Features | <ul style="list-style-type: none"> a. Support from full web suite b. API and customisation plus query and reports available with integration of e commerce angle. c. Social events, Web Integration and Quickbook services <p>For more details, visit here. (a snapshot of the website has been attached below)</p> |
| Platforms | Web, Android, iOS |
| Pricing | Zartok-89 is eligible for an Essential plan at \$99 per month. Free Demo available |
| User Reviews | <p>4.4/5</p> <p>Based on customer ratings as per websites such as getapp.com</p> |

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Events & Ticketing

Manage event creation, ticketing, and promotion, all from one easy-to-use platform

[Learn More](#)

Additional Suggestions

Note: The platforms mentioned below have been added due to their low-cost/free nature, the features offered by them are fairly limited.

[Donate Kindly](#)

| | |
|--------------|--|
| About | Donate Kindly is a free donation platform that adds onto an organization's website. With 0% platform charge, they charge 2.9% + \$0.30 per donation as a processing fee. |
| Top features | <ul style="list-style-type: none"> a. Customizable donation forms b. Easy embed using widgets |

[Give Butter](#)

| | |
|--------------|---|
| About | Give Butter is a full suite of free fundraising and event tools with a built-in CRM to manage donations, tickets, donor profiles, and fundraising data. This platform is free but charges a nominal secure payment fee. |
| Top features | <ul style="list-style-type: none"> a. Fundraising forms, pages, events, live streaming and auctions b. Full donor management CRM |

KEY PERFORMANCE INDICATORS

Definition

A key performance indicator (KPI) is *a quantifiable/measurable value that showcases how effectively an organization is achieving key objectives.*

KPIs help access the progress of projects, programs, products and other such items.

Purpose

Selecting the right KPIs for an organization can drastically improve function as tracking fundraising metrics can help improve strategies, programs, and thus, fundraising outcomes.

The KPIs suggested here are to be used, if Zarton-89 is preparing a manual system of data management instead of relying on the CRM softwares suggested above.

Method

Attached below is the list of effective KPIs for Zartonk-89 to use for an overall improvement in operation. These are the KPIs that should be considered first, along with other KPIs that Zartonk-89 should utilize on a per project basis.

The KPIs suggested have been classified into General KPIs and Donor Relationship KPIs for better clarity.

General KPIs

1. Donor and Donation Growth (DADG)

Donation growth rate: Measures revenue gained from donations year-over-year.

Donor growth rate: Measures the number of donors gained month-over-month.

Helps in: Understanding the growth tendencies to become better equipped at setting standards

Formula

$$(\text{Donors (Year X)} - \text{Donors (Year Y)}) \% \text{ Donors (Year Y)} \times 100$$

$$(\text{Donation (Year X)} - \text{Donation (Year Y)}) \% \text{ Donations (Year Y)} \times 100$$

2. Donation Conversions by Channels (DCC)

To point at channels that prove to be more effective than others, this metric gathers information on the source of donations i.e., donation conversions

Helps in: Considering effective channels in isolation and improving strategies on them for faster growth

Formula

$$\text{Donors Converted} / \text{Total Donors prompted by the CTA}$$

3. Matching Gift Rate (MGR)

This metric represents the contribution percentage matched by corporates, or the number of individual donors that avail the benefit of employer-matching donations

Helps in: Recognizing the loss of matched employers donation and thereafter educating donors of this opportunity to increase impact

Formula

$$\text{Number of Donors (that secured donation match)} / \text{Total number of Donors} \times 100$$

2.3

Donor Relationship KPIs

1. Donor Lifetime Value (DLV)

This metric quantifies the overall value an individual donor will provide the organization.

Helps in: Making better decisions to dedicate efforts on campaigns

Formula

$$\text{Average Time as Active} \times \text{Average Donation Amount} \times \text{Average Frequency of Donation}$$

2. Donor Lapse Rate (DLR)

This metric informs the percentage of donors not retained from one financial year to the next.

Helps in: Understanding failures/areas for improvement in retention efforts

Formula

$$\left(\frac{\text{Number of Lapsed Donors}}{\text{Number of Donors that participated in the previous year}} \right) \times 100$$

3. Donor Acquisition Cost (DAC)

This metric considers the cost of acquiring a donor by computing direct costs

Helps in: Making better investment decisions for a particular channel after computing the DAC since it is a representation of how much money is spent to acquire a donor

Formula

$$\frac{\text{Money Spent on Donor Acquisition (Direct Costs)}}{\text{Number of New Donors Acquired}}$$