

# Report: Data Management Platforms Comparison

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Looking at Salesforce, HubSpot, and other similar data-management system for nonprofit organizing, advocacy work, and donor-cultivation needs.

## Summary

Our organization has valuable institutional data that are underutilized or simply forgotten, due to lack of communication between departments and outdated digital platforms. Although Blue State Digital CRM (BSD) provides sufficient support for advocacy emails and payment processing through web forms for IA and organizing team, it falls short in cultivating the donor growth our organization need. The BSD platform is not robust enough to handle tasks that other data segmentation systems such as Salesforce and HubSpot provides. The following notes are recommendations on the current status of our data, which system we should consider based on their pay structure, and suggestions for next steps.

### I. Current BSD System:

Blue State Digital Data and Price Breakdown: <http://cfor.cc/bsdprice>

According to BSD, we pay an annual contract for the RIFA and C3/C4 account. Each month the base subscription fee of **650.00** a month, plus additional fees for **subscribers** on our email, along with credit card transaction fees of 0.50 per transaction.

We have close to 481,151 subscribers out of 1,009,633 for RIFA. For Main C3/C4 account, we have about 114k subscribers out of 192k contacts. Base on this information alone, we should tackle the email lists in two ways:

- Analyze the emails that are part of contacts, but not subscribers.
- Segment subscribers list into smaller lists based on specific needs, for example:
  - Level of past engagement
    - Frequency
    - Non frequent, but by specific campaign
    - If by campaign, are there specific keywords—“immigration, safety net”, that this particular user cares about, etc
  - Amount donated

## II. Comparison between Salesforce and Hubspot:

### Salesforce - Pardot

- [click-through demo](#), which will help you see many of the features Pardot has to offer, and can also give you somewhat of a hands-on experience in using the system.
- series of [short Partdot videos](#) that show some basic functionality.
- [deep-dive demo](#) that is specific to how many nonprofits would use Pardot.
- [this video](#) shows how many nonprofits are using Pardot for their fundraising efforts

Price breakdown: 1000-3000 a month. See [Pardot Pricing breakdown here](#) with feature comparison.

### Hubspot

- More user-friendly and intuitive than Salesforce
  - <https://www.hubspot.com/products/crm>

### Visual Comparison:

HubSpot is a newer platform on the market but it surpasses Salesforce on user-interface, easy of admin, email and campaign management, customer support, social media integration. Salesforce is more established and it wins on customer contact management, report and analytics, customization.

+

Add Product

HubSpot

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salesforce

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## Ratings

Meets Requirements <a href="#">See More</a>	<div><div></div><div>8.5</div></div> <div>(Based on 590 reviews)</div>	<div><div></div><div>8.7</div></div> <div>(Based on 2665 reviews)</div>
Ease of Use <a href="#">See More</a>	<div><div></div><div>8.8</div></div> <div>(Based on 592 reviews)</div>	<div><div></div><div>7.9</div></div> <div>(Based on 2665 reviews)</div>
Ease of Setup <a href="#">See More</a>	<div><div></div><div>8.7</div></div> <div>(Based on 261 reviews)</div>	<div><div></div><div>7.4</div></div> <div>(Based on 943 reviews)</div>
Ease of Admin <a href="#">See More</a>	<div><div></div><div>8.8</div></div> <div>(Based on 263 reviews)</div>	<div><div></div><div>7.9</div></div> <div>(Based on 959 reviews)</div>
Quality of Support <a href="#">See More</a>	<div><div></div><div>8.7</div></div> <div>(Based on 535 reviews)</div>	<div><div></div><div>7.8</div></div> <div>(Based on 2264 reviews)</div>
Ease of Doing Business With <a href="#">See More</a>	<div><div></div><div>9.0</div></div> <div>(Based on 260 reviews)</div>	<div><div></div><div>8.1</div></div> <div>(Based on 940 reviews)</div>
Product Direction (% positive) <a href="#">See More</a>	<div><div></div><div>8.9</div></div> <div>(Based on 587 reviews)</div>	<div><div></div><div>8.3</div></div> <div>(Based on 2652 reviews)</div>

## Marketing Automation

<b>Email Marketing</b> <a href="#">See More</a>	 9.0 (Based on 399 reviews)	 7.7 (Based on 1264 reviews)
<b>Campaign Management</b> <a href="#">See More</a>	 8.8 (Based on 382 reviews)	 7.9 (Based on 1375 reviews)
<b>Lead Management</b> <a href="#">See More</a>	 9.1 (Based on 258 reviews)	 8.3 (Based on 1630 reviews)
<b>Marketing ROI Analytics</b> <a href="#">See More</a>	 8.5 (Based on 344 reviews)	 7.8 (Based on 1070 reviews)

## Features

### Sales Force Automation

<b>Opportunity &amp; Pipeline Mgmt.</b> <a href="#">See More</a>	 8.6 (Based on 418 reviews)	 8.7 (Based on 1967 reviews)
<b>Partner Relationship Mgmt. (PRM)</b> <a href="#">See More</a>	 8.2 (Based on 233 reviews)	 8.3 (Based on 1149 reviews)
<b>Task / Activity Management</b> <a href="#">See More</a>	 8.3 (Based on 423 reviews)	 8.2 (Based on 2035 reviews)
<b>Desktop Integration</b> <a href="#">See More</a>	 8.6 (Based on 327 reviews)	 8.1 (Based on 1496 reviews)
<b>Territory &amp; Quota Management</b> <a href="#">See More</a>	 7.6 (Based on 265 reviews)	 7.9 (Based on 1445 reviews)
<b>Contact &amp; Account Management</b> <a href="#">See More</a>	 8.8 (Based on 441 reviews)	 8.8 (Based on 2032 reviews)
<b>Customer Contract Management</b> <a href="#">See More</a>	 8.2 (Based on 265 reviews)	 8.3 (Based on 1462 reviews)

## Platform

Output Document Generation <a href="#">See More</a>	 (Based on 97 reviews)	 (Based on 439 reviews)
Sandbox / Test Environments <a href="#">See More</a>	 (Based on 79 reviews)	 (Based on 508 reviews)
User, Role, and Access Management <a href="#">See More</a>	 (Based on 192 reviews)	 (Based on 583 reviews)
Performance and Reliability <a href="#">See More</a>	 (Based on 184 reviews)	 (Based on 574 reviews)
Customization <a href="#">See More</a>	 (Based on 179 reviews)	 (Based on 587 reviews)
Workflow Capability <a href="#">See More</a>	 (Based on 177 reviews)	 (Based on 614 reviews)
Internationalization <a href="#">See More</a>	 (Based on 104 reviews)	 (Based on 364 reviews)
Document & Content Mgmt. <a href="#">See More</a>	 (Based on 148 reviews)	 (Based on 519 reviews)

### III. Recommended Next Steps:

#### Sanitize and Analyze Our Current Data

- Since RIFA's list is the largest, we should try to trim all the subscriptions here.

#### Hire a consultant

- To analyze data we do have and make a recommendation on what type of data we use.
- Some things to consider is—
  - Looking at the email lists on BSD, which emails are most active?
  - Which emails are unnecessary, or should be archived?
  - Which emails can be segmented into subgroups and use those specific groups for fundraising.

#### Adopt both system in limited capacity for testing

### IV. Resources

1. Comparison of systems:  
<http://www.socialraise.com/socialraise-blog/selecting-the-best-nonprofit-crm-salesforce-vs-insightly-vs-infusionsoft-vs-civicrm/>
2. <https://attentive.ly/> - social media tracking
3. <https://secure.actblue.com/> - fundraising platform
4. <http://www.softwareadvice.com/nonprofit/crm-software-comparison/>