**CRM Solution Discussion Questions**

The following is a list of questions to consider when understanding/soliciting the requirements of any proposed CRM solution for the Transgender Oral History Project.

**Users**

* How many members of the organization will have access (be users) to the CRM?
* Currently, about how many total constituents (including volunteers, donors, and members of TOHP) are there?
* It was mentioned during the pitch that the CRM should have different levels of access. We assume there will be an Admin user, but how many other levels of access would be required in addition the Admin level? What actions would the lower levels of access NOT be able to do?
* Will the CRM solution be accessed by members of the public, or will it only be used by members of TOHP?

**Features/Requirements of CRM Solution**

* What information will need to be recorded for volunteers?
* What information will need to be recorded for donors?
* How is volunteer/donor information currently recorded, and who normally records the information?
* In addition to maintaining and recording *volunteer* information; is there anything else that will be done with this information, such as reports?
* Similarly, in addition to maintaining and recording *donor* information, what other actions will be taken that involves donor information?
* What type of information would you say is essential and should be included in any generated reports?
* What DON'T you want in the reports?
* How often do you think this CRM tool will be accessed by TOHP?

**Other**

* Can you describe what your previous experience with any CRM tools was like?
  + Which CRM did you use?
  + What exactly did you do with the CRM?
  + What worked the best?
  + What didn’t work very well, or had issues?
  + What did you wish you could do that you couldn’t?