9 Must-ask Questions for Your Nonprofit CRM RFP

By Steve Birnbaum

When you're developing an RFP for your new nonprofit CRM system, some questions are more equal than others.

In addition to the basics about functionality, make sure you include the nine other must-ask questions that follow. These queries get at some of the most important, but sometimes overlooked, aspects of a nonprofit CRM or fundraising software system. The answers will reveal a great deal about the in-depth capabilities of the systems you're considering. In fact, the answers to these questions are arguably even more important than the answers to basics like features and pricing. In addition, they ideally will head off many bland, cookie-cutter responses that more typical questions elicit.

Let's begin . . .

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1 Can you describe the vision and product roadmap for your system?

The systems you consider might have wonderful features today. Your organization, however, is buying a system for today and for years from now. Make sure vendors can clearly explain their plans for their system in the next several years. Be alert for vendors offering outdated client/server technology today while planning to require your purchase of an expensive upgrade in a few years.

2 Can your system grow with us?

Your organization is not static, so ask vendors if their systems are scalable. Your system's capacity should easily grow with your organization, accommodating any number of users and constituent records. Even if you never plan to grow that large, you should be confident that millions of records and hundreds of users would never be a problem.

3 Can your system align with our business processes?

You work with constituents and constituent data in the way that makes sense for your organization. Vendors should be able to configure their systems to work the way you do, not vice versa. Look for a platform that accommodates extensive configuration without the downside of having custom software.

4 Are you committed to system integration?

Ask vendors if they have a track record of working closely with other vendors to share data and processes among systems. A look at their current system integrations (finance systems, content management systems and others) will offer a good indication if they actually do. Unless you want to live in your vendor's walled garden, make sure they play nicely with others.

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5 How can you help us improve our major gift effort?

The key to effective major gift solicitation is having a full picture of a prospective major giver's relationship with your organization. Ask vendors if their system includes a comprehensive constituent relationship management (contact management) platform to support annual and long-term development efforts for major gift programs, including tools for forecasting, reporting and analysis. The system also should run on tablets and other mobile devices on which major gift officers often rely.

6 How does your system safeguard constituent data in the cloud?

Make sure vendors can specify how their security strategy keeps sensitive donor information safe. Cloud-based systems should help you meet data governance rules, have well-established policies for disaster recovery and PCI compliance and meet all appropriate regulations and standards.

7 Does your system empower multi-channel fundraising?

More and more NPOs are running sophisticated multi-channel fundraising campaigns. Any system you review should not only support large, complex direct-mail segmentation for online and offline campaigns but also offer tools to support major and planned giving, including capital campaign management.

8 How will your system support our national/chapter organizational structure?

Your chapters shouldn't get less out of a system just because they're not national headquarters. Ask if vendors' systems have built-in national/chapter organization functions. Systems you consider should also be able to enforce rules about how chapters share, see and access data.

9 Do you provide a development environment?

A complete development environment should be a mandatory part of any system implementation. Ask vendors if they include all of your data in a test system at no charge, allowing you to test integrations and other system changes without affecting your live data.

Remember, your organization's goal is not simply to buy a nonprofit CRM or fundraising software. Your ultimate goal is to make sure that your system improves the way you interact with all your constituents and helps you grow their devotion to your cause. Good luck with the process.

About the author: *Steve Birnbaum has more than 15 years' experience in nonprofit management, with particular expertise in organizational planning, technology implementation and change management. Steve currently is Vice President of Client Solutions for SofTrek Corporation, developer of ClearView CRM. He previously was Chief Operating Officer of Jacobson Consulting Applications, Inc. (JCA), a firm specializing in helping nonprofits use technology more effectively to achieve their fundraising goals. At JCA, he managed delivery of consulting services and new business development. He also provided strategic guidance for large organizations launching complex technology initiatives.*

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