Nonprofit 911 – May 13, 2008
Doing Donor Management Right: Expert Advice
with Robert Weiner, Eric Leland and Paul Hagen
Sponsored by Network for Good

The MP3 audio transcript can be found at
www.fundraising123.org or www.nonprofit911.org

Jono Smith: Hello, everyone, and welcome to the May 13, 2008, Nonprofit 911, sponsored by Network for Good. My name is Jono Smith, and I am the marketing director here at Network for Good. If this is your first time to join a Nonprofit 911 call, welcome. If you're not familiar with Network for Good, we are a nonprofit, just like you are, and our mission is to help other nonprofits raise money online.

Nonprofit 911 is one of the many free resources that Network for Good provides the nonprofit community to help organizations increase their online fundraising and nonprofit marketing results, or, in the case of today's call, donor management, CRM, and donor databases.

In addition to Nonprofit 911, we also provide online fundraising resources and services directly to nonprofits. And we invite you to visit our website at www.networkforgood.org/npo, to learn more about those, or visit our Learning Center at www.fundraising123.org. Once again, if you'd like to ask a question--and we've already received several great questions of today's speakers--you can email us at any time during today's call at fundraising123@networkforgood.org.

We have had well over 300 people register for this four-part series on CRM and donor management and donor databases. The series kicked off, on April 15, with "All You Need to Know about Choosing a Donor Database" with Robert Weiner. On April 30, we discussed "Strategies for Implementing a Donor Database" with Eric Leland. And last Tuesday, on May 6, we went through a presentation from Paul Hagen on "Constituent-Centric Organization: The Benefits of CRM."

This will be one of our most unique Nonprofit 911 calls in that there's no presentation. The purpose of this call is just to give you an opportunity to ask these experts your questions about all things related to CRM, donor databases, and donor management.

And while this is not a sales call, I would be remiss if I didn't mention that Network for Good has its own stake in the donor-management ground. We have a service called a Donor Management Suite, which has been designed especially for small to mid-size nonprofits. And I'd like to invite you to visit our website to learn more about the Donor Management Suite.

Once again, today's call is being recorded, as have all the calls in our Nonprofit 911 series. So, if you missed Paul, Eric, or Robert, or one of our other speakers, you can always go to www.fundraising123.org and download an MP3 transcript or a text transcript of one of our calls. At this point, I would like to briefly introduce today's speakers, Robert Weiner, Eric Leland, and Paul Hagen, and then we'll get right to your questions.

Robert is the president of Robert Weiner Consulting. He's an independent technology consultant based in San Francisco, and he specializes in helping nonprofits make more informed, strategic decisions about the selection, use, and management of technology.

Eric Leland spent the last 13 years working with progressive organizations, focusing on strategic planning, including website and database planning and development. And he is also the founder and director of Leland Design.

And last but not least, Paul Hagen is the president of Hagen 20/20, a consulting firm that provides business strategy and planning, technology strategy and selection, project program management and coaching services to nonprofit organizations and social enterprises.

So I want to thank our speakers for being here. And let's get right to the questions. Just a reminder: the email address, again, for sending in your questions is fundraising123@networkforgood.org.

I'll try and moderate these questions as best that I can and direct them to individuals. But in some cases, for more general questions, I may throw them out to the group, and if that becomes too unmanageable of a process, I'll go back to trying to as specific questions.

But let's start with a question for Robert. And this question is that, "At a time of talk of a recession, and money being very tight, my executive director is very cost-adverse. How do we make the case that there is a good return on investment here in terms of investing in a donor database? How do we show that a database is worth it financially for our organization?"

Robert Weiner: That's a really good question, and a really hard question to answer. It's very case-specific, so it depends upon your organization and how you raise or want to raise money, plan to raise money in the future in ways that you might not be doing now, and what it's costing you to do your work now, or would cost you based on your current tools to get into a new kind of fundraising, and whether you can do that effectively given your current tools.

People have been raising money since before there were databases, so a database is not an absolute requirement simply to be a fundraising organization. You can track your donors on paper files and index cards or Excel spreadsheets. But I don't believe that you can track your donors effectively using those tools, especially if you start to get into large numbers.

If you have a few dozen donors that you're cultivating, you can do that in your head. But once you start getting into large number or multiple fundraisers, or needing to share information even between a single fundraiser and an executive director or the board, you really need tools to help you stay focused and focus on the right donors and the right projects and make sure that you're asking the right donor for the right amount of money for the right project, and that the money then goes to that right project the donor thinks he or she is funding. And that becomes extremely difficult to do with more primitive tools.

There's also what is typically called the "hit by a beer truck" scenario, but another fundraiser I know calls it the "win the lottery scenario." Your development director wins the lottery tomorrow and doesn't come back to work. What information have you lost by not having it in a good information system? So that's the basic argument for a good electronic information system that is shared within the organization, that it is your institutional memory when a fundraiser departs, or to allow you to collaborate and share information across the organization.

And then there are arguments for more sophisticated tools. A lot of the simpler donor-management products may be fine for taking straightforward cash gifts from a small number of individuals and only allowing one person to use the database. But if you were moving into more sophisticated direct mail, where you need to target certain populations and send a different kind of message, via paper mail or email or whatever medium you are using to reach out, you may not be able to do that through your existing donor-management system.

If you're moving into major gifts or corporate and foundation fundraising, you need to be able to track your prospects through a cycle of, first, identifying that they are a probably prospect and then qualifying them as actually having some interest in supporting you, and then cultivating them. And there are a series of steps in cultivation, and then there are as series of steps in solicitation. And sometimes solicitation requires participation by more than one person in your organization--staff members, board members, volunteers, the executive director, etc.

It's very difficult to manage that kind of activity with some of the more simple, less-expensive databases. So, if you're going in that direction, you may have outgrown your current system.

So, partly, it's a matter of what can you do with your current tools? Partly, it's a matter of what kind of fundraising are you doing, or are you planning to move into, and will your current tools support that? And how efficient can you be?

And then you can also do some return on investment based on what it costs you to use your current tools. And this tends to be easier for larger organizations. It takes us two minutes to process every gift in our current system, to enter the gift and generate a receipt.

We could do that in one minute with a more efficient system. And you have tested that and benchmarked that. And that would save you X numbers of thousands, or tens of thousands of dollars a year, and help you make your case for a return on investment. Or you're paying a vendor to do your direct mail now, and you could bring it in-house if you had a more sophisticated tool, saving you X amount of money--assuming that you really would save money.

So, as I said, it's a difficult question to answer. It's very specific to each organization and the kind of fundraising you are doing and the kinds of tools you have and the scale at which you're doing that fundraising. But I hope that this was helpful.

Jono: Great. Absolutely. Thanks, Robert.

Let's go into a couple of much more specific questions. And I will throw these out to Eric or Paul. The first one is from Jan, and she wants to know, "How can we manage households--married and partner donors who may have different surnames, and sometimes give as a couple, sometimes give separately? Do you have any suggestions on the best way to set up a business process or a strategy for managing and dealing with households?"

Eric Leland: This is Eric Leland. I can weigh in on it. See if Paul has anything to add.

So, house-holding can be sort of handled in a multiplicity of ways. I mean, in essence, what we have is, in many cases, it's not just a family--for instance, a husband and wife who may be interested in the organization, but only need one mailing, for instance, because the family essentially is giving. We also have households that may be roommates, or they may be friends.

There's a variety of ways that we can think about how these folks group. And so the key word it really comes down to is: how do you define your groups, and who are in these groups, and then how do you need to speak to these folks, as groups versus as individuals?

When managing households, this is a place where looking at a system sort of beyond your index cards and Excel spreadsheets and so forth starts to really be of value. Handling households normally requires that you can identify one member of that household to have special abilities--essentially, that person that will get the message, for instance.

So, if you're going to email a group of folks, and you find out that those individuals are parts of households, you need a system to be able to understand who in that household gets that information and gets that appeal, and what's the best way to address them--so, just sort of identifying that person.

And in some cases, what you're trying to do is you're emailing one person in that household, and you're emailing that person directly. In other cases, you're trying to email the family or the household itself with some kind of a generic name.

So the second feature you're trying to look for is: what is the name of that household? Do you give it a name? Is it "the Leland family"? Is it "the Hagan family"? Or, in fact, are you addressing it to one individual person?

So, when you're looking at systems that handle this, the term that you're looking for is: do you handle house-holding? That's what you want to ask the vendor. But in particular, what you're really looking for is - how do these systems group people. And the two features that you're looking for is how does it allow you to name that group. Can you give that group a special name that appears on the mailings? And number two, can you control who in that group, in fact, will get the mailing, so that you can essentially exclude others from getting the same mailing?

Jono: Great. And then, sort of along the same theme, I'll throw this out to Paul. This comes from Sherry: "We're newly setting up a database. I'm still working out how to enter information into Salesforce. What are the most important categories of information to have for donors, for volunteers, and for prospects? What tips and suggestions do you have for setting up the information and essentially determining what's the base-line level of fields we should have for these different types of constituents?"

Paul Hagen: Great. The most important thing is: what do you want to get out of it? How are you reporting? How are you measuring yourself? How is your organization measuring yourself? What kind of lists are you generating? What kinds of communications are you generating from those lists? It's those kinds of things, when you go through your own processes internally and define those things, that the categories start becoming clearer.

One thing to say about categorizations - I've seen a lot of organizations try to create one constituent type or contact type, and then there's a whole 15, 20 different categories within that particular type. Break those things apart, especially in something like a Salesforce or a CiviCRM. Some of these platforms allow you to create multiple categorization or taxonomy schemes.

And within each of those categorization schemes, make sure you're dealing with all of one kind of thing. For example, I don't want to mix--we'll say fruit--apples and oranges and bananas with pens and pencils and other kinds of things. I want to break those into two categories, one being fruits and the other being, say, office supplies.

For contacts, a kind of donor--you may have multiple kinds of donors, and those various kinds of donors could be one category. Set up an extra category for in-kind donations, for example. That may be volunteer time, attending an event, or various other kinds of ways that people contribute to the organization in kind.

Yeah. There is a general rule of thumb, and I won't say that this has to be the case. But in general, people can accept about seven, plus or minus two, items. So, in thinking about how many items you're going to put in one kind of category, think about it being seven, plus or minus two--so, a maximum of nine in a particular category.

And then, if you're getting a laundry list of things, think about breaking those up into two different things. But make sure each category is totally exhaustive and mutually exclusive. So, within your category, all of the items are exclusive of each other, and you've exhausted that particular category. I don't know if that helps, but those are some of the things that I use...

Robert: Paul, could I amplify on that?

Paul: Yeah, absolutely.

Robert: One of the problems I frequently see, in like a donor category, is that there is a category for individuals, and then there's a category for volunteers, and there's a category for board members. But a board member is a volunteer and a board member is an individual. So, as Paul was saying, how do you make those categories exclusive so that you always pick the right one every single time?

So, pulling board member and volunteer into a separate category than a donor type would solve that problem. And maybe board member is a separate category than volunteer.

Jono: Great. Getting some really good questions flying in across emails here. Just a reminder: we've got plenty of time for more questions, so you can email us at fundraising123@networkforgood.org.

And let's go to a question from Virginia, who's writing us from New York. She says that "We have been using a donor database since 2004, and most recently have started using it for grants management as well. But now we're at a crossroads because the donor database that we are using has not been designed in a way that meets our growing needs.

“So we're wondering, do we explore other options or stick with what we've got and look for a way to improve the situation? Like most nonprofits, we have little to no budget to hire a consultant to guide us through these choices. What do you suggest?"

Eric: This is Eric. I can take a crack at it.

So this isn't an uncommon situation, whether you might branch out into grants management or you start getting into more robust event management, and you're taking your system that you have now that may be managing donors, may be managing just contacts, and you're starting to stretch it and pull it in different directions.

A couple of the things that you can do, before you start really looking at consultants and really getting into sort of a deep project, is to take a look at how you use your tool right now. So, quite often, as we find that tools are becoming more and more challenging for what we do, we can look for efficiencies in making sure that we are in fact using the tool sets that we have to their ultimate capacity.

So, for instance, there may be certain areas of the tool or you started to put in information. It doesn't necessarily fit, perhaps in that field because the field isn't named right. It's not appropriate for the information you're putting in there.

Nevertheless, what we find is that folks start to slide in information in the system just because they have to. And they don't spend a lot of time making the notes and making the documentation and sort of teaching other folks the kinds of work that you're doing to make this tool work with you for some period of time.

You want to make sure that if you're doing that kind of work and you're stretching your tool, that you're spending more and more time documenting, that you've made that choice and that you're also looking at the capacities of the tool, talking to the vendor, reading the documentation and so forth to find out if there's anything that you're missing, if there's something extra that you can use to sort of improve what you've already got now.

The other thing you can do before you really start looking at a consultant is just look at some more easy to read, high level reviews of what's out there. What are some other folks using when they run into issues such as grants management? Maybe you're looking at a tool that combines a variety of deeper functionalities, how I might want to manage donors, how I might want to manage our website. I have this grants management piece, I also were looking more at volunteers and so forth.

There are several good resources out there. One, in particular, I might point you to is on idealware.org. And they just have some very readable documents, sort of quick reviews, a series of software in different categories, including grants management software.

I mean, it might help you kind of explore what's out there, what are some of the costs that you're going to run into and get a sense of what you'll need to budget for and timelines and scope, before you really launch into coming up with the money and the resources and time, internally, to actually be able to manage that projects.

Paul: This is Paul. I'd love to add something there, which is start first not with the technology and whether you should switch the technology, but start with what you're trying to accomplish. If you look at how you want to manage grants, in your ideal world, how would you do that and what would the processes be? How would you like to process a grant? How would you like to report out on what's happening? How would you like to be notified of deadlines, for example, that you have to meet?

One of the things with grants management is you're talking about... And I'm presuming you're thinking about applications for grants and managing the grants cycle. And maybe that your foundation or you're managing the grants going out to organizations, I'm not quite sure, which those are two very, very different processes.

But if it's asking foundations or applying to foundations for grants and managing that process as well as the follow up, that's going to look very much like a major donor cultivation where there's multiple steps, you're meeting with them, you're taking them through various different stages until you actually get a grant you may applying and so forth.

If you're just managing donors, individual donors that are giving small amounts, that's going to be a very, very different process than a longer, what I would call a "sales cycle" for major donors or for getting grants. In which case, if you're trying to shove that into a simple donor database, you're probably going to have some problems. But again, focus first on what it is that you're trying to do and really spend some time on a white board and talk about what the process should be, then go back to your software and say, "Can my software fit that?"

Or, if they can't, then you've at least got a really good tool to go and look at and select some of the vendors that are out there and take which vendor will do what I'm trying to accomplish.

Jono: Great! Thanks, Paul! OK, the next question is from Candilyn and Candilyn asks, “Can you recommend an affordable way to research current donors and prospects, especially for major gifts?” Let's see, who wants to take that one? Robert?

Robert: Sure! I'll take that one. There is an industry generally called "wealth screening" or "electronic screening" that specializes in helping you identify your prospect base, who you should be focusing on. And I should say that first; this is your prospect base. This is not giving you names of strangers who are rich and turning them over to you. You can certainly buy a list of names for direct mail programs and there are vendors who are list brokers and there are direct mail consultants who will arrange list exchanges.

But that's not the same as "wealth screening." Wealth screening is taking a list of known names and then trying to find out which of those names have the most money. So, if you go to APRA, their website is aprahome.org, which is the Association of Professional Researchers for Advancement, APRA. They have a resources section of their website that lists most of the vendors who are in that industry.

Some of the names that I see most often are Target Analysis, Target America, Black Bought, Prospect Information Network, which is now owned by Cantara. Wealth Engine, which merged with Wealth ID. Grants Von Gleer... And I know this is going by too fast for people to write down, but all these names should be on APRA's website.

So, that's one aspect, is who has money. But I think an equally important aspect and one that's frequently neglected is who cares about you, because there was an article in a publication called "On Philanthropy" a while back called "Why Bill Gates is not a prospect for your capital campaign." And I do know people for whom Bill Gates is a prospect for their capital campaign. So, it's not about Bill Gates. It's about you.

Does Bill Gates know your organization? Do you have Bill Gates' home address and email address? Will Bill Gates answer the phone if you call? Will Bill Gates take a meeting with your major gift officer?

If those things are true, well then Bill Gates is a prospect for your capital campaign. But otherwise, you should probably forget about it because he doesn't care about you and it doesn't matter how much money he has. And in Chicago, it's always Oprah and in San Francisco, it's always the Levi Strauss family. There are always these rich people in whatever town you're in who don't know you from Adam. And so, how could you possibly get them to answer your call?

So, that kind of screening that looks at inclination, I think is equally important. And most of the same vendors who do wealth screening or many of the same will also do what's called a "data mining project" or "data modeling" or "propensity screening." It's all essentially the same thing, looking at your data and your interactions with your prospects to identify patterns and try to predict who cares enough about you that they would be interested in supporting you.

And then, you can combine that with a hard assets screening to look at people who care about you and have assets. So, again, looking at APRA's website, APRA's conferences and they have regional conferences around the country, are great sources to learn about these kinds of tools. The cost to do these kinds of projects generally runs about a dollar to two dollars a name, although there are usually some minimum thresholds below which you're going to pay the same amount no matter how many because there's a minimum charge.

And also, for a propensity screening, you have to have a big enough database to get a statistically valid sample. So, you can't get a propensity screening out of a database with only a few hundred names. You need many thousands of names in order to get statistically valid information to predict donor behavior. But you can do a wealth screening on any size databases.

And some of these vendors have online services. Wealth Engine does, PIN does. I believe Grants Von Gleer does, where you can look up a single name online and get essentially the same information you would get if you ran 20,000 names through as a batch and got those all returned to you at once.

Jono: Great information. Thanks, Robert. We have a question here from Joseph and he's actually addressed this to all three speakers, so maybe we'll start with Eric: "Please describe some of the expectations a nonprofit should have as we consider moving from one donor database to another?

“For each speaker, if possible, could he describe either one success story and/or one unsuccessful story with an eye to things like the number of records, issue areas, (this is a very detailed question, thank you, Joseph), size of staff and/or in-house technological literacy, length of time of the migration, estimated total cost, staff training, and troubleshooting-type support?"

So once again, Joseph is looking to hear some of the success stories or unsuccessful stories related to those issues for a nonprofit considering moving from one CRM or donor database to another.

Eric: Very good. Joseph raises the point that there's a host of features and functionalities essentially that you get, and in many cases, you lose when you transfer from one system to another. And what that means is that the biggest expectation to have in this process is that there will be significant change management in the organization.

Regardless of where you're coming from or where you go to - with the exception, in some cases, of upgrading from the package you have now to something similar but slightly improved in the same family - in many cases, you're going to have significant change in how you do the work you do, the staff learning that and so forth.

One example I have is an example of failure. In the cycle that this client that shall remain nameless went through several years ago was they had been spending about six to eight months essentially having water cooler conversations in their office, lamenting about how terrible their system was; it was a donor system. And each of the staff in the 15-person organization had come up with workarounds, so basically there was some information that was in the donor system and much more information that was on each of their desktops in various ways.

That came to a head when they had to do an annual end-of-year appeal and it took them days and days to pull that information together and to send out a sensible email; again, it was scattered around. So they started essentially a 'put out the fire' process where they said well this can't be; we need to have a solution before this end-of-year appeal goes out that allows us to sensibly aggregate and pull out the information we need to message our constituents. They immediately leapt to a tool because they had a very fast timeline and said there are tools out there that do what we need to do, which is accurate.

They found a tool, they downloaded the demo and they started using it by immediately putting in real data as fast as they could into the system, and they immediately started asking their staff to pull out the reports that they needed in order to generate this appeal. What they did was they ended up getting a new system in about a quarter of the way in and had this old system that was broken, along with the various Excel spreadsheets on everyone's desktops.

So instead of having two systems that weren't working so well, they now had three systems that were working even worse. And their end result was they didn't get their end-of-year appeal out and they had staff spending about 33% more time on the technology and not getting out the information than they actually needed.

The lesson learned there is that these things do take time, as Paul alluded to earlier. It's absolutely critical that if you have a need now and it's going to happen in the next month and you're talking about a systemic change in your organization, you got to put the breaks on making that change happen according to a timeline that's arbitrary to the success of the project.

The project will be successful when you've defined your needs and you've gone out and use those needs to effectively evaluate solutions; and that you're actually looking at solutions and saying do they or do they not meet the needs that we've written down and decided as a team and that we've evaluated and investigated.

And then work with a vendor to find a sensible implementation strategy that allows you to see on an iterative basis how this tool rolls out. You don't just see the tool when it rolls out at the end, but you see it iteratively as it's being configured for you and certain features are being put in. Maybe you've paid for certain modules; maybe your developer is building certain tools, but you're experiencing that along the way so that you can change gears before it becomes another monster.

Paul: There are a couple of things that I'd like to reiterate on, and one is there is absolutely no silver bullet. I think a lot of the organizations that I've worked with feel a lot of pain with whatever tools they've got right now and imagine a world where all of that pain instantly goes away with a new system. And what I often find is that there's a new pain; databases and information systems are a pain. I always say that software kind of sucks - the more sophisticated we become with it, the more we want out of it.

There is almost always a dip in productivity with a new tool. Humans are very, very adept at taking generally really crappy tools and making them work pretty well. We can certainly pound in nails with a sledgehammer or make something work with what we've got.

People understand how to use Excel and they've got their systems down and are pretty productive at that. All of a sudden going to a new system and going through that learning curve of how to use that system and get out of it what you want takes some time, and that most often is one of the big shocks and making the cultural changes, as Eric mentioned, are often difficult.

In the example that I have, they ran into problems even before they got to the technology. It was a faith-based institution, about a 12-member staff, lots and lots of volunteers, and a fairly sizable donor base. They were very much struggling with the information spread all over the place, and when we did an audit, we found over 40 repositories of data scattered through the organization.

We found that they were in regular contact with less than 25% of their constituent base. They had a sense of that before, but they didn't quite know it was that bad. We found that $100+ donors were not even receiving thank you notes and they were giving a lot of checks to the organization. There was just no process and they were just trying to keep up with some of the data entry into one of the databases that they had.

So there were certainly some high hopes that if they got a new system that they could certainly do better than regular contact with 25% of their folks. They were imagining what if we hit 75% of all of those people. One of the big dreams was empowering those constituents to fundraise on their behalf.

They were considering several kinds of technologies and actually after going through how they collected data across various different sources, we learned that the tools that they were considering only dealt with about half of the kinds of constituent interactions that they were having. There were many multi-step cultivation types of things that the original software didn't deal with.

But even before we looked at the technology, we ended up deciding on a technology that would work, but organizationally, they were going through some growing pains. They had been a very flat organization. I've been in these organizations before where we lead by consensus; everyone's involved in every decision and so forth. They were outgrowing that and really needed more autonomy in managers to make decisions and move.

And so, we have decided... I told them, I said, "Before you even get into technology, there are plenty of processes that you could fix." The not getting letters out to donors is not a technology problem. That is a process issue. And so, they realized they needed to do an organizational restructure before technology would ever help any of what they needed.

And if they didn't do that organizational restructuring and if they didn't do the process fixing, that the technology, again, would be overlaid on something that was broken in the first place and you aren't going to necessarily fix that.

So, we ended up spending a lot of time and the good news is they've gone and put the technology thing off for a year and spent the last year really working with an organizational development person and saying we're going from a 12-person organization probably growing to a 80-person organization or a 70-person organization and what does that mean in terms of how we're doing things, in terms of how we're structured, in terms of how we're lead.

And they're now coming back to the technology piece a year later in a much better place with a much better sense of what they're doing and they've made a lot of fixes, process-wise, through the way that are improving things. So, my story, I think, is a success story, yet it doesn't involve technology at all. It's really a process kind of thing and an organizational thing.

Robert: This is Robert. As the person who submitted the question clearly understands, there are a lot of moving parts to this kind of project. You're frequently trying to solve some complex business problems, some of which Paul just talked about. The products out there are complex. They are individually complex and then it's complex to compare them to one another and make a decision.

And then, the project to actually convert to the new piece of software is complex. So, there are a lot of moving parts. And it's really important to set up the project properly at the beginning, which means a strong project leader. Ideally, that person has some technology background, but doesn't necessarily have to be a techie. But that person really does need to understand how to keep a project moving forward.

And ideally, that person really understands the business of whatever the database is supposed to solve. So, if it's a fundraising database, they understand fundraising and can help the people who eventually use the database make good decisions. It also requires managing the expectations of the organization, both for what kinds of new capabilities will be delivered by the database and also how long it will take. And it's hard to project the timeline for the project.

I work with all kinds of organizations, so I've worked on projects where the database has been selected within two or three months. And then, I've worked on other projects where it's taken a year or two to make the decision on the database, and that's not because it was a bad process, it's because it was a very complex problem for a very large organization.

I've worked with clients who have implemented their donor databases in three or four months and I've worked with clients who have implemented their databases in a year-and-half to three years; again, depending upon the complexity of the problem. So, based on the complexity of your organization, the complexity of your current data and if you're coming from 40 different data sources, essentially you've got 40 conversions ahead of you.

And then, the complexity of the new database and also the resources that you have to bring to bear on the project. You need to manage the expectations appropriately for the timeline and not take an arbitrary timeline that happens to go live at the beginning of the fiscal year or the beginning of the calendar year when that's not realistic.

Another aspect of project management is focus and one of the big problems that I see, both with the selection project and with the implementation, is the person who is in charge and sometimes, there is nobody in charge, which guarantees...

But the person who is in charge does not have the time to actually focus on the project. That person still has a fulltime job or a fulltime job-and-half in addition to trying to make the database project work and keeps getting pulled off in a million different directions and fighting fires and pulled into meetings that have nothing to do with the database. And yet, the database is the number one priority with the hard deadline looming ahead of it.

So, giving that project manager, ideally, at least half time relief. And the best projects I have seen had fulltime project managers who can stay focused on the project. And then, that project manager needs to pull together a project plan which would include the things that were in the email question, securing and buying the software and whatever hardware you need and converting your data and coming up with business rules and developing all your reports and buying new desktop hardware, whatever would be involved in that project.

And that person also needs to pull together the right team of decision makers o configure that software to decide what data is going to be converted because sometimes, you'll have old data that is just garbage and the amount of time that it's to take you to clean up that data and make it usable in a new system may or may not be worth doing. And if it is worth doing, the person who's the project manager may not have the information to actually clean up that data. You may need other people in the organization to make those decisions or just to share the labor. So, pulling together the right team to make decisions and to help make the work go as smoothly and quickly as possible.

And then, part of managing expectations is communicating with the entire organization about what are the benefits of the database and how long is this going to take and why is it going to take longer for other things to happen while the database project is going on and who will need to be involved and when and also making sure those people who will be involved at different stages of the project but not every stage of the project, they will come in to make a particular set of decisions, that they know that they will need to make those decisions and they need to be available at whatever time that is to make those decisions and then they can go away, but they need to be involved in making those decisions.

And then, the whole testing process and going through the different iterations of the database and making sure that the database is doing what you need and the data came over cleanly and that the reports are actually accurate and are balancing and look the same on the old system as the new. That, again, is something where a team needs to be involved. So, again, there are a lot of moving parts to this and pulling together the right people and setting the right expectations and having a realistic timeline and making sure that you have the resources to get the project done are critical to success.

Most of my clients have been able to do this, but I have clients who have just gotten stalled because the person who is in charge of the project keeps getting pulled off onto other responsibilities. Or, one of my clients, a national political organization, they have such a tight cycle between elections when they can make decisions like this and they have not been able to maintain the focus to get this done in that short window of opportunity when they could go out and actually choose a new database.

And then, they will also have a short window in which they can make the conversion. So, deciding when you can actually get this work done and then staying committed to that timeline are critical.

Jono: Great! The next question is from Bob. Bob is a fundraising and finance director from Pennsylvania. This question is for Paul. “Do you advise using a donor management system to also manage our mailing list of non-donors for newsletters, for example, and including names that are added simply to populate the mailing list? Or is it advisable to keep a separate mailing list database, which may include donors separate from the donor database, so that the number of names is more highly controlled and focused on donor cultivation? The theory is that once a person in fact donates, their name gets added to the donor database, or just a software to be able to handle all that grouping within one database? I should know that, we're a very small organization and we use our database offer that is in the very lowest tiered cost.”

Paul: Yeah, I agree. This is an issue that a lot of folks are facing because oftentimes, your bulky mailer is a third party system like Constant Contact or Vertical Response or something like that or some sort of open source kind of thing. I like the idea of keeping as many names in the same place as you can. I think if to the extent that you're keeping and you can categorize your fundraising software a little bit so you can indicate that someone is not a donor. I see no problem keeping all the names in the donor database.

Certainly keeping folks separate kinds of databases just adds to complexity, and you're never quite sure if you're sending multiple emails out to someone or you've updated someone's email address appropriately. So I would say if you've got the capability to customize your existing donor database at all and you can keep them in one area, all of the better.

Typically, I think what you can do with some of those third party bulk emailers is do an export and import every time you are going to send out your new list of folks, or send out a new email to that list of folks. And typically, I know things like Constant Contact keep track of those who have unsubscribed. So those should be suppressed every time you upload that list.

I'll ask the other guys for thoughts on that, too, since they're doing much more on the implementation, especially like Eric. But my sense would be to try to keep them in the same place.

Jono: Just to clarify, I think Bob was actually talking about an offline newsletter.

Paul: OK. Gotcha, gotcha. OK. My answer would still be the same, taking out the third party email kind of thing. I would still suggest keeping them in the same place.

Robert: I concur, just really quickly to add on. It's a good test case of thinking about how your information works with each other. You may have donors and you may have folks that currently are not categorized as donors, and you do want to talk to them in different ways. But it's good to think about what's your strategy for cultivating contacts, and what exactly are they doing?

In many, many of my clients, folks that start out as not donors end up becoming more and more involved in the organization in various ways. And so it's nice to be able to look at your one system and begin to mark them in different ways as they sort of evolve and how they're invested in your organization.

So if you have those in two systems, that becomes more complex to deal with. If you have all the people information in one place, it becomes an easier thing to really address who you're working with and how are they working with you.

Eric: And I would add that in a small organization, you usually don't have the resources to keep multiple databases in sync effectively. Even big organizations have this as a problem. So if you have the same people in multiple systems, you are going to have problems.

Guaranteed, you will have an address change come on in one of those systems and not get communicated to the other system. And then the right hand won't know what the left hand is doing. So if you can manage all the contacts in a single system, you will be better off.

Jono: And here is a question from Kevin. This is actually for all three of you. He's wondering if anyone has any experience with products that help with camper registration. So, we work with camps who already utilize camper registration systems that should be integrated with their entire database.

“Some systems like CampBrain and CampMinder are incorporating donor database fundraising functionality into their camper registration system. Do you have any experience with this niche of the donor database world? Is there a resource available that can help us incorporate the functionality of these systems in a comparison with all the generic donor databases out there? So any experience on the phone with this niche?”

Robert: No. I do have clients who have had the camper registration issue. But they have wound up choosing a best of breed donor database and then making that talk to their camper registration system rather than trying to find a single integrated system. So I don't have a comparison of integrated camper registration systems.

It's a very similar issue to really any kind of event registration. And this best of breed versus integrated question comes up all the time, whether it's online donations or email marketing or major gift fund raising or event registration. There's something that you want your donor management system to do that it can't do.

And then the question is do you get a whole new donor management system to add this piece of functionality? Or do you have multiple stand alone systems that need to talk to each other? Just like with the keeping the contacts in one place, I generally think that an integrated system is fantastic if you can find an integrated system that actually meets your needs.

The problem is they tend not to. They tend to be really strong in a particular area and weak in other areas. And so, you need to decide whether those trade offs are acceptable. And essentially you may be going through multiple evaluations. So you're evaluating the donor management features of an integrated system versus stand alone donor management features.

And then you're going through the registration evaluation of an integrated system versus stand alone registration systems. It does make it a more complication system. But it's just so hard to find a single integrated system that does everything well.

Paul: I reiterate that. I haven't had any particular experience with camper registration, but an arts organization struggled with this a lot in ticketing systems. Often, the ticketing systems, there's just a very, very specific kind of functionality that's required to save seats and assign seats and take payments and what not.

And often they're struggling as well, because guess what? Those people who are buying tickets are great targets for going and hitting up for donations or for volunteers or a whole host of things. I would be hitting hard on the camper registration guys and letting them know what you need. That you need the integration into those systems.

And be asking them when they're either going to do the integration or provide open APIs. Something called an open API; it's an application programming interface. And you don't need to memorize that. Just be asking about it. And essentially the open APIs, depending on how well they're done, can enable third party developers to integrate systems more easily.

But oftentimes the vendors say, gosh our customers aren't asking for this kind of integration. What they're asking for is all of the camper features. And so, I always tell all my clients, go talk to the vendors, pound on their doors. Tell them what you need, and tell them how their systems are not meeting what your needs are. And they respond.

Eric: The one time that I've dealt with campers specifically at registration, the client ended up looking more and more at more generic event management systems. I remember one name that did come up, and this was at least over a year ago, but there was a company called Thriva that did event management solution as well as sports and camper and a couple other registration solutions.

So they do exist, and in some cases, they're a bit more generic. They're not simply camper registration, but they may sort of branch out to be more event management. So what Robert and Paul also said, how to look at this integration is key to think about regardless.

Jono: Quick question for Robert. This comes from Nikia. “If a monthly donor does not want to receive a monthly thank you letter... I assume this would be a recurring donor. How can you remind yourself or someone to send her a letter at the end of the year? So I guess this is a question about essentially, is there a way to do this in a donor database system? Is there a way to automate this?”

Robert: It's a common question. This came up just last week on a list I'm on. I think it was on the FundSvcs list. Different organizations having different opinions on what they should do about monthly receipts for monthly recurring donors, payroll deduction donors, etc.

But it's a common problem. There isn't a common solution in every database. You may need to have some special mail suppression code that you assign to these monthly donors. There might just be a handful of them to say, "Don't send a receipt." And then build that into your monthly receipt program that, if they have that particular flag, you suppress them.

And then have a second receipt program that is the year-end receipt program that looks for that code, and only pulls in people who have that code. Or maybe you're doing that for everyone and then can pull a cumulative receipt, which can be a hard challenge. Some databases, or their reporting systems, cannot pull a cumulative receipt, listing every transaction during the year and a bottom line total.

So you want to make sure you can do that as well. Other than having to send them twelve separate receipts paper clipped together. So the answer will depend upon on your database. But absolutely, there should be some way of adding an interest code, an attribute, a mail suppression code, a mail inclusion code, a newsletter code, some kind of code that's going to allow you to both suppress people from the monthly receipt mailing list and then include them in the end-of-year receipt mailing list.

Jono: Next question. And I'll throw this out to the group. And it's a question about budgeting for a data migration. “Can you give examples based on projects you've worked on or clients who've worked on it at sort of all three levels? For example, a small Internet migrating from maybe an Excel, a medium to a large migration?”

Eric: I can take a stab at that. I worked on a number of migration projects. And I will say that's the hardest part to predict until you get closer and closer to understanding your data and the new system, and where they combine and where they don't.

On smaller projects, where you're dealing with... Often it's not so much about how many records you have, but it's how complex they are. Are you storing five bits of information about a person or 25 or 125? And is it structured where you have one person and multiple donors? And then do you have other kinds of structures that are one to many like that?

That starts to bring up the complexity elements.

With the smaller projects, you'll often find that if you're working with a solution--a vendor, for instance that provides the donor's system, maybe an online-hosted donor system--they provide a template that you can use. It's essentially an Excel spreadsheet that they say, "Well, here are our fields."

And they'll give you, generally speaking, some amount of hours where they'll map their fields to your fields. Either they will, or you will, put information into their template, their Excel spreadsheet. And then they import it into their system. And you basically test and approve that.

That can be a fairly limited role on both parties. When you get more expansive, what you're doing is a much more detailed mapping and cleaning process. So you're spending time in house really identifying the information that you have.

Where is it? What is it? You're sort of defining what it is, and you're eliminating those things that are unnecessary, or otherwise you don't understand what it is. You're trying to get really clear with the information. And then you're describing that to your vendor, who is then working with you to map that to their new system. So there's back and forth that happens at that stage.

For the larger project, in some cases I've seen projects where you're spending about 40 to 60 hours of staff time doing your part of presenting that data and defining it to your vendor. And then they're spending the better part of $5,000 or $10,000 simply working through your data to pull it into the system. In the medium to large projects, I can see that happening.

Again, what the price is, is entirely dependant on the complexity of your data instead of how far and into what system you are moving it. Is it very, very different from the system you have now? Is it very expansive? Is it very similar to the structure you have now? Those things add or subtract complexity.

Paul: It also varies depending upon the database that you're going into. There are some vendors who don't provide implementation support at all. They basically give you a spreadsheet and some documents and say, "Knock yourself out."

And there are some vendors who don't charge for implementation. They bundle that in as part of the purchase price. And then there are other vendors who charge a significant amount, as much as you're paying for the software, or more.

So partly, it depends upon the complexity of your conversion and other issues that we haven't yet talked about, like customization, which can be incredibly expensive. And then partly it depends upon the database that you have chosen and the vendor's pricing model.

But I typically see prices, at the low end, ranging from about 50 percent to 100 percent of what the database cost. So on a $2,500 piece of software; you might pay $1,500 to $2,500 to the vendor to convert. At the large end, I have clients who have bought databases costing half a million dollars and then they'll spend half a million to a million dollars on the conversion.

So there's an incredible range of costs there. And you really won't know until you choose your vendor, or choose three vendors to get prices from, and do some exploration with them so they know what they're walking into.

Jono: We've got a few more questions here, and I don't want to leave anything out. Kathleen has written in: "We're a brand new nonprofit organization. And I began using ACT for a few mail merges and my management system."

And she's looking at donor-based systems that is specially designed for nonprofits as opposed to continuing to use a corporate contact management type tool. And if so, the million-dollar question of course, how do I determine which one is worthwhile for us? And why don't I throw that out to Eric?

Eric: Yes. That's also another common challenge. There'll be databases that in fact may do some or many of the functions that you want. But the way that they're written is to a business process that may not be like your own. So some of the language they use or the way they present the form, the input form or the reports, aren't necessarily the relevant language that you need in order to understand and use those.

Again, it goes back to something Paul said earlier. So what's the next step? What you need to do is understand: what is ACT doing for you now that works really well. And what are those systems processes in your organization for managing donors, for managing contacts that it does not do well? Essentially, what do you need to output about your donors? What are the kinds of reports and information you need to see? What does that require for you to track? And where's the divide between what ACT provides you and what it doesn't?

Of the stuff that ACT isn't providing you--the features, the functionality, the information--you need to put a circle around that amount that's critical. So often there are things that maybe your current system is not providing you that you want, but you don't necessarily need as most critical. It's important to give yourself the challenge of identifying what are those things you cannot part with. And put a circle around that bit of information.

And then going forward, take a look at tools that were maybe reviewed in your sector that are more tailored toward nonprofits. So you can get a sense of those tools that may have the reports that more speak your language. They're not about sales. Sales report so much as they're about income reports, donation reports, and those sorts of things. And you can see them for the kind of organization that you are.

Having said that, really quickly, just because the interface may be on a more business level, and might speak more of the business language, don't necessarily write it off. Salesforce.com had this problem initially for a while where it didn't float with a lot of nonprofits who looked at that tools, initially and said, "Gee, this is all about sales. And I don't sell anything."

The reality is sometimes the functionality behind that can be really robust. And it's important to step back from the tool again, look at your processes, understand how you need to manipulate your information, and then take a fresh look at these tools to get a perspective on what really is going to work for you.

Paul: The other part of that question was how to make the decision, and I would strongly suggest looking at idealware.org, techsoup.org, and also the donor databases section of Network For Good's website, www.fundraising123.org. They have a lot of articles about how to make these kinds of decisions.

Jono: I think Eric is actually leading a webinar on that topic next week for Idealware, so if you go to Idealware's website you can learn more about that.

We've had a couple of questions here about QuickBooks. I don't know who on our panel is a QuickBooks expert or has worked on that, but Patricia writes in and says, "With our small non-profit we're trying to use one program for database management and then move things directly into QuickBooks. Any ideas as to how to handle that process?"

And then Sherry says, "We're starting to evaluate our donor management system and processes, and realize that we essentially do duplicate data entry for our donations. First our client's manager enters the information into her system of QuickBooks and then the development staff enters it into the donor database. Should we be looking for a donor database that integrates with QuickBooks?"

Any QuickBooks experts on our panel or any comments in general on dealing with finance systems?

Robert: I'll take a quick stab at it and then see what the other guys have to say. I would certainly be looking first at your donor management package and asking the vendor if there is any integration into QuickBooks. I know a good portion of the donor management systems out there, that I'm aware of, are hooked into accounting packages of a number of sorts, and QuickBooks often is one of those because it's one of the more popular ones out there. So I think what I would do is first go to the QuickBooks.

The second I might do is see if there is some kind of more automated way of downloading recent donors out of your donor management system and into QuickBooks. There may be a way, working with a consultant, that they could develop some sort of script or automated process to upload those. Eric may have to say whether that's a feasible thing or not. But those would be the first two things that I'd be looking at before I just wholesale replaced my donor management system.

Eric: Yes, and I'm definitely not a QuickBooks or financial expert. Having looked at this integration a few times, what you're often looking for is a process where you get the donation in and typically, at least in the smaller organizations, you're going to have the development assistant or someone on that level opening the envelopes, typing this information into your donor database so that you can start doing these thank you and so forth. And then you're handing off this information to your bookkeeper or to the finance person.

A couple things you want to do is be able to do some level of verification. So you typically want the information to go in to your donor database, at least in the smaller projects I've been working on, and then develop what's often called a batch export. Some systems allow you to do a monthly batch of all the donations that have come in. Yu do that to your donor system; push that out.

And QuickBooks does allow for importing. Depending on your donor system you may be allowed to import that last batch. Or your bookkeeper may use an Excel spreadsheet, whatever you pulled out of your database, and just pull it in themselves.

They have a chance, essentially, to verify whether or not the checks they have in hand - that your assistant has passed off to the bookkeeper - in fact matches the batch that they've gotten from you. That's sort of a way to do a double check and say, "Well, you typed it in right or wrong." You can make sure you have both your donor database as well as your QuickBooks in order.

A lot of folks - nonprofits - don't want to mess with their QuickBooks, they don't want to leave that open for anybody else to use, so having some real tight integration in some cases might be more trouble than it's worth because you'll have to work on a lot of controls of who gets access to that actual financial pieces of information. I'm sorry; I forget what the second question was.

Jono: The second part here was, “If you do move to another donor database that has a better QuickBooks integration, do you recommend trying to migrate the data, which always has issues, or just starting over with a new system and using the old database for historical purposes?”

Eric: Yeah, I think I would underscore a pulse edit. I don't think it's necessarily worth throwing away your system because you have an integration need with Quickbooks. Look at some ways that those can tie together and be more of a report process, or an import/export first before you go down that road.

Again, stepping back, define your needs; understand how often you're going to do this kind of integration work. How often you need to talk to Quickbooks, and look for a solution that doesn't necessarily mandate that you throw away a tool that's working well for you.

Robert: And as far as migrating the data with financial systems it's fairly common to do a fresh cutover and just start with balance forward, but with donor management systems I would not approach them that way. I would bring forward any usable historical data that isn't garbage, and that isn't going to take you more time to clean up than it could possibly be worth, because the longevity of a donor is a critical piece of information.

You are going to be asked at some point by your board or your executive director, "Who are our longest donors? Who are our most loyal donors? Who has been giving to us for more than 10 years? We want to implement an anniversary thank you communication with our donors, so we want to look at people who have given to us for more than five years, and on the anniversary of their first gift we want to send them some communication." You can't do that if you don't bring forward the historical data.

Jono: And while we're on the topic of data integrity, Robert, Daniel has a question about what's the best way to clean up a database from entries that have bad postal addresses, and people who have not forwarded us their newest postal address, et cetera, et cetera.

Robert: So some things can be cleaned up electronically, particularly addresses. There are a lot of vendors in the business of tracking down current addresses for your constituents. The Post Office maintains a database called the National Change of Address Database, NCOA. They license that data to lots of different vendors.

So if you just go the Post Office's Website or Google NCOA you will find lots of vendors who will do an NCOA match against your database, and that finds people who have moved within some time period - usually it's six to nine months - but some of these vendors can go back 15 to 20 years.

Then there are a lot of marketing database vendors who get their data not from the Post Office, but from people who fill out those warrantee cards when they buy toasters, and can track down people. There are a lot of different vendors in the data hygiene business.

You are also required - if you're doing bulk mailing - to send your data through an NCOA process on a regular basis. A lot of nonprofits have a mail house that sends out their mailing, so it may be getting done for you by your mail house. Typically the mail house will do that before every major mailing.

One of the things that mail houses typically don't do is send you back the updates that they discovered; they include them in their mailing. You may not ever get that data back from them, so if your mail house is doing an NCOA lookup for you, make sure that they're giving you back the results.

Other things have to be cleaned up manually. Some of them you can write a program every time you find this particular code change it to this other code, but a lot of this is manual work that requires looking at every record and sorting the data in different ways, and looking for common problems and then fixing it manually, unfortunately.

Eric: Just two quick points I would add on, some databases actually have integrated the national change of address functionality. And so what you'll want to do with each of these challenges is when you've chosen a vendor, speak with them directly about the specific data cleaning challenges you have and find out if there's not a way that they've either integrated that.

In some cases, it can be useful and easier for you to import bad data and clean it in the new system, in other cases that's not advisable. So explaining that to your vendor what you're working through and what it takes for you to import can help you avoid a lot of headache.

Jono: OK, we have two more questions, the second to the last question is from Leo writing from Seattle. Leo's the executive director of a social enterprise, so they have both earned revenue and they do fundraising. Leo says, "We need CRM tools for a very active sales profit, but need a donor management tool for fundraising as well. Should we keep these systems separate or can they be integrated?" Any suggestions, Paul?

Paul: Certainly something like a Sales Force would allow you to keep them integrated, in terms of doing things like earned revenue, especially if that's coming from organizations, businesses or some sort of entity as opposed to an individual. Sales Force is a little bit weaker doing individual donations, although the nonprofit template has helped that a little bit. But I would look to keep them together. People who you're making money from on your earned revenue are certainly prospects for donations as well.

So I wouldn't see any reason, but note that the processes are very different and that's really, really important. Make sure you know those processes, write them down, whiteboard them, diagram them or do whatever you need to show what those processes are and find a system that can accommodate the two of them. That's what I would be looking for.

Jono: OK, last question comes from Ann. "How do various donor databases earmark donations and hide donors who wish to remain anonymous? I've found this to be a shortcoming. This is a very important issue for us. Some of these donors you absolutely don't want to mess this up with."

Eric: A lot of donor databases have a field for anonymous, that's a pretty common feature. So I would say that it is a shortcoming of her database that it can't do that. But again as we were talking about earlier with the monthly receipt vs. the year-end receipt, there should be some kind of mail suppression code that you can use to keep the anonymous donors out of systems.

There are different levels of anonymity. There are people that are anonymous for a particular gift, but their name and address can be in the database. And then there are people who are anonymous and they should never be published. And then there are people who are anonymous and only the executive director can know who that donor is.

And so it's very common to have a record in the database that is just 'Anonymous' or maybe it's 'Anonymous 1' and there's 'Anonymous 2' etc. And that corresponds to some locked paper file that's locked away that only one person in the organization has access to, to know who 'Anonymous 2' is, so that 'Anonymous 2' can never appear on any reports other than as anonymous. 'Anonymous 2' will never get any mailings and the receptionist can never look in the database and figure out who 'Anonymous' is.

So first there should be an anonymous code, and if not, use some kind of attribute code, interest code or mail suppression code to flag people as anonymous. Second, understand their level of anonymity. And third, for people who are super, super anonymous, you need some way of tracking them outside of the database.

Jono: Excellent. I want to give our speakers, Robert, Eric and Paul the opportunity to offer any closing remarks, if they have any. But I also want to thank them for their time today, I learned a great deal. We had some fantastic questions. There were a couple we ran out of time for and we'll get back to those by email.

But once again, I want to thank our speakers and remind you that if you go to www.fundraising123.org, you can download audio transcripts of the sessions that they've led previously, as well as this session. Both MP3 and text format.

You can also find links to Eric, Paul and Robert, to the articles they've written, to events they're speaking at and so forth through www.fundraising123.org. But I did want to invite our speakers, if they had any closing comments, starting with Robert.

Robert: I guess my closing comment is that a database is just a tool, and that you need to put the right person or people in charge of that tool. And I see great donor databases completely fail because no one is in charge of the database. No one sets the standards, no one trains the staff. No one decides what can go in and who can get at that data. No one is in charge of the quality control.

So identifying someone in the organization who is the database mom or the database dad and giving that person the authority to manage how the database is used is critical to success with a software product like that.

Eric: This is Eric. I would just leave you with one thought. Don't be scared to be an expert. Often, as you move to a new system and maybe you're going to engage a vendor and maybe a consultant or maybe both. As a nonprofit, you are an expert in certainly what you need and exactly how you do the work you do. And that's critical information for the developer and the vendor to hear.

They don't know it and you do. So you have every right and duty to put your foot in the door and be in a partnership with these folks. Not a client services sort of relationship as much as a partnership to really getting the product that you need. So be the expert that you are.

Paul: My little mantra that I'll repeat again here is, know what you're trying to spend. The more time that you spend up front in front of a white board mapping out how you want to work, the more you can go into those partnerships with vendors and be asking what you need.

Often the vendors have something they're trying to sell you, and if you don't know what you're wanting, then they lead the conversation, not you. So spend the time understand what you want. Think about both your programmatic side as well as your funder side.

There's a lot of data that you end up on the program side collecting about people, and those people often become donors. I've seen so often that people come in looking for a donor management system, and then it doesn't do the things that you need on the programmatic side. That's to me what CRM is all about is conquering all of that.

But again, you've got to know who your people are and how you're trying to... How you interact with them and what you need to get out of the system, both in terms of marketing and outreach, in terms of serving your various different constituents, and in terms of cultivating those relationships over time.

Jono: And hearing that, I would just end with a line that my friend Nicole is fond of saying. She consults with organizations, primarily on CRM and enrollment management and donor databases, and she says, "Don't get caught in the fool-with-a-tool trap."

And expands on that by saying, if you start with your strategy and your objectives and your vision and your metrics, last on the list should be you technology specifications. Because if you get all your strategic piece in place, then it will make it a lot easier to pick the right technology and not end up in that fool-with-a-tool trap. So, I've always enjoyed hearing Nicole say that, and I think it's good advice.

And once again, great advice from all three of our speakers today. I want to thank them for their time. And thank you for attending today's nonprofit 911 call. We actually have another call on Thursday about website redesign. So if you're thinking about redesigning your website, you can go to Fundraising 123 and learn more about that on the training tab. And it was a pleasure speaking with everyone today, and we look forward to talking to you again on our next nonprofit 911 call.