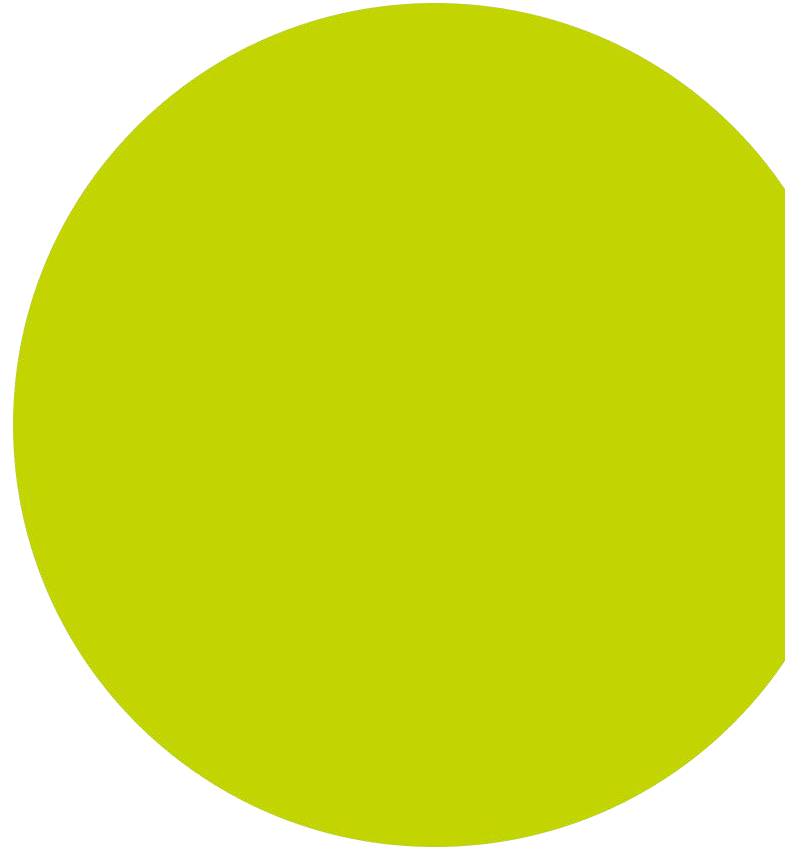
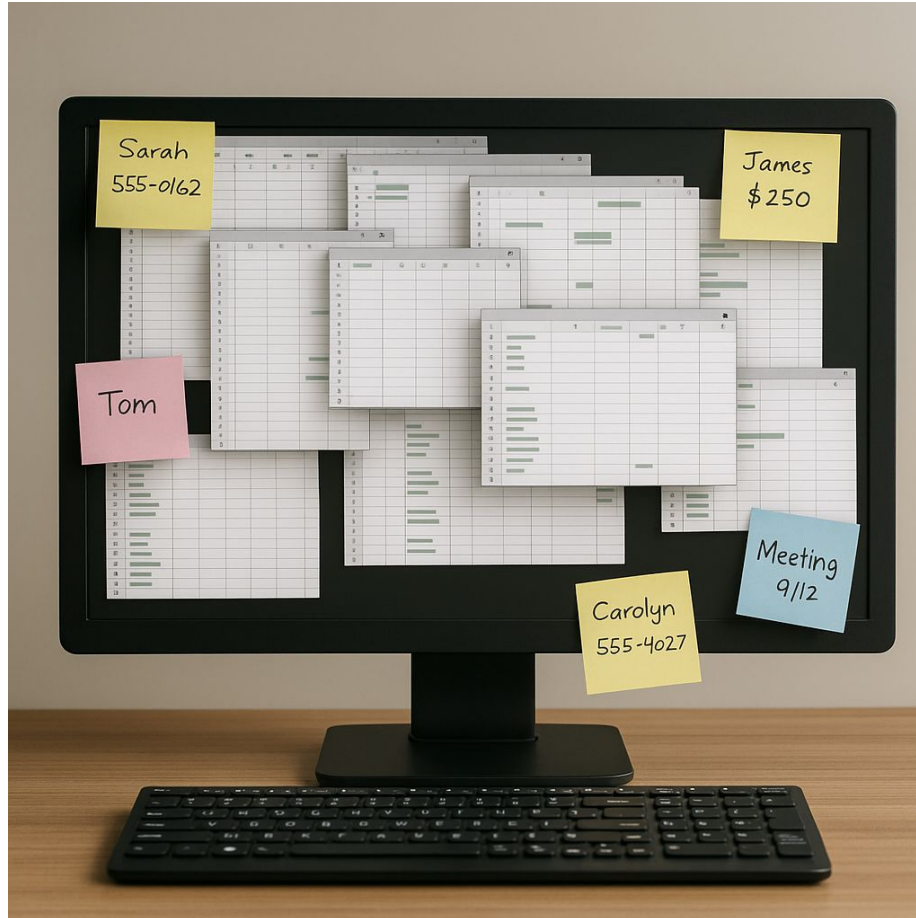


Building Your CRM For Long-Term Success

September 2025





What to Expect

Why CRMs Matter

Choosing the Right CRM

Setting Up for Success

Recap + Resources



Why CRMs Matter

What is a Customer Relationship Manager?

Manage, build, and
measure relationships.


Why use it at all?

Stay organized

Do more with less

Maintain retention

Save time



Choosing the Right CRM

Define The Unknown

- **Key Goals** → Outcomes that drive must-have features
- **Number of Users** → Who needs logins and access
- **Who & What You'll Track** → Donors, volunteers, events, grants
- **Budget** → Think beyond licenses
 - Seats
 - Training & Support
 - Add-Ons
 - Integrations

Essential CRM Features (Tier I)

- **Donor Management** → Track giving history and relationships
- **Basic Email Marketing** → Send newsletters and thank-yous
- **Email Tracking** → Log one-to-one donor emails
- **Reporting & Dashboards** → Create giving summaries and reports.

[Givebutter](#), [Neon One](#), [DonorPerfect](#),
[Bloomerang](#)

Marge Arin 🏠 Arin family
Contact since May 1, 2022

Primary Details View All

Email: marge.arin@4good.com

Phone: +1 617-555-2856

Address: [+ Add Address](#)

Birthday: [+ Add Address](#)

Tags: VIP Volunteer Edit

Activity History

- July 24, 2023: Supported Bid & Butter Charity Auction \$3,000
- June 27, 2023: Made a recurring donation to Butter Fund \$150
- June 23, 2023: You sent Marge Arin an email

Giving Summary

Year to date ↑ Top 1% of donors this year
\$6,400.00

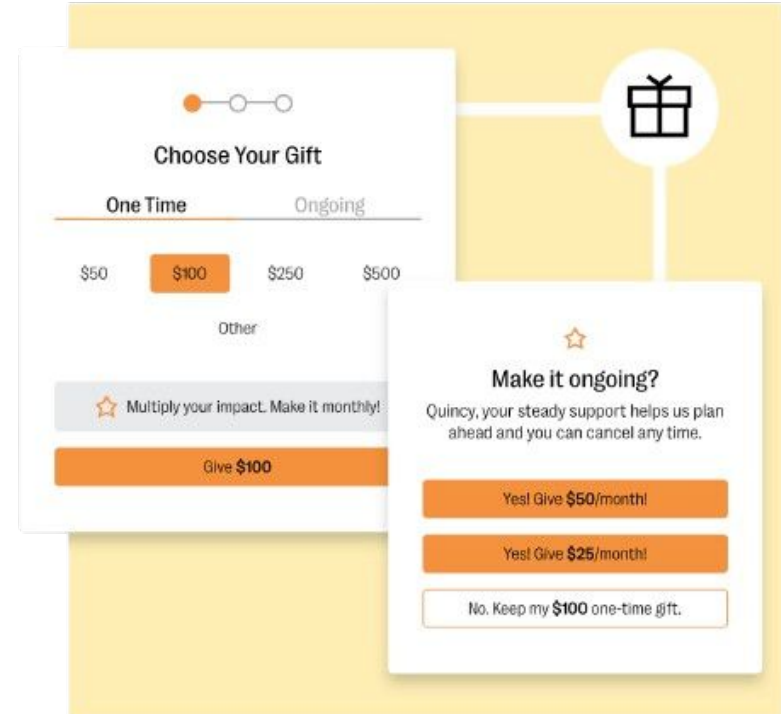
Line graph showing giving history from Jan 1, 2023 to July 31, 2023.

Largest: \$3,000.00 **Recurring: \$150**

Growth CRM Features (Tier II)

- **Online Giving Pages & Events**
→ Donation forms, ticketing, recurring giving.
- **Volunteer Tracking** → Hours, scheduling, communication.
- **Grant Tracking** → Application deadlines, reporting, renewals

[Givebutter](#), [Bloomerang](#), [Little Green Light](#), [Network for Good](#)



Enterprise CRM Features (Tier III)

- **Integrations** → Accounting, advocacy, advanced marketing.
- **Major Gifts & Moves Management** → Track pipelines and stewardship
- **Advanced Analytics & Multi-Channel** → Dashboards, SMS, social, direct mail.



[Salesforce NPSP](#), [Raiser's Edge NXT](#),
[Bloomerang](#), [Neon One](#)

How to Evaluate CRM Vendors

Must-haves vs. nice-to-haves → Define your checklist before demo day.

Demo → Test with real scenarios, and know what to ask.

Research → Talk to peer orgs, not just sales reps.

Hidden cost → Ask for a 3-year, line-item quote (licenses, support, payments).

[CRM Evaluation Checklist](#)



Setting Up for Success

Setting Up For Long-Term Success

Data & People

Start with clean data

- Remove duplicates
- Update bad addresses/emails
- Archive inactive records
- Stay consistent to data entry

Define processes

- Who enters new data
- When it gets logged
- How follow-ups are tracked
- How events & volunteers are managed

Assign a CRM "Owner"

- Designate point person or super users
- Support staff questions
- Keep adoption on track

Setting Up For Long-Term Success

Habits & Maintenance

Standardize processes

- Create clear data entry rules
- Document naming conventions
- Define required fields
- Share simple cheat sheets

Train staff regularly

- Onboard new hires
- Schedule refreshers
- Share quick tips & updates
- Encourage peer learning

Review annually

- Audit data quality
- Check adoption & usage
- Update processes & rules
- Reassess org needs



**Recap &
Resources**

Putting It All Together

- ✓ Start with clear goals, then define features
- ✓ Match the system to your team & team structure
- ✓ Clean data + clear processes = better outcomes
- ✓ The best CRM is the one your team will actually use

Helpful Resources

[CRM Evaluation
Checklist](#)

[CRM Setup Success
Checklist](#)





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