



# In Search of Fundraising Software: Using Technology for Greater Efficiency

*Follow these 10 steps to find the fundraising software of your dreams.*

BY ED GRENIER

Selecting fundraising software may feel like an overwhelming task. Yet software packages offer so many new ways to solicit, manage, and recognize your donors that automating your fundraising system is a must.

The question is: Which fundraising software package is best for your organization? Here is a simple 10-step process that will help you demystify the process and choose the most appropriate software to meet your organization's needs.

## 1 Set Objectives.

"Before looking into any packages," suggests Jay Love, senior vice president of Master Software Corporation (Fund-Master), "first decide what you want to accomplish by obtaining a new software package." For example, you might have objectives similar to these:

- Increase efficiency.
- Increase dollars raised.

- Target donors.
- Improve prospect research.
- Reduce administrative workload.
- Improve services provided.
- Identify areas needing attention.

After you have listed your objectives, rank them in order of priority. Keep your top objectives in mind throughout the next nine steps.

## 2 Choose a Coordinator.

"The organization should identify one person who will have overall responsibility for the system," Love says. "This is critical, especially as the organization adjusts its current system and begins to expand and grow the program."

## 3 List Prospects.

Next, you need to create a list of potential software. There are many fundraising software systems on the market, and all have their strengths and limi-

tations. Some will be more appropriate for your organization than others. To build your list of prospects, you can tap into many information sources, including:

- peers and mentors
- professional fundraising associations
- trade conference exhibitors
- trade publications
- promotional materials
- current vendors
- your accountant

## 4 Gather Information.

Once you have identified potential software, you'll want to request materials and examples from the software companies. To get an idea of the compa-

Demo sessions give you a chance to see precisely how your work will be done.

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nies' capabilities, there are two steps you should take:

First, give each software company six pieces of information about your organization:

1. current computer setup
2. new software objectives
3. areas and types of fundraising
4. a sampling of current data
5. reporting requirements
6. interfacing requirements

Second, ask each company to do the following:

1. Provide examples using your data.
2. Outline hardware requirements based on future volume.
3. Estimate pricing.
4. Provide an overview and a demo disk.
5. Include a list of people in your region who are using the software.

### 5 Narrow Your Decision.

Now, how do you take all the information you have gathered and use it to narrow your decision to the best candidates? A broad-based, nationwide survey conducted by Master Software Corporation provides some answers.

The survey revealed interesting differences between first-time and second-time software buyers. First-time buyers ranked price as the most important item when selecting a new software package. Second-time buyers ranked price *last* on a list of 10 items. Below are the lists, ranked from most to least important by first-time and second-time software buyers. These results may enlighten you and help focus your decision-making process.

#### **First-Time Buyers Consider:**

1. price
2. ease of implementation
3. equipment
4. growth potential
5. training
6. documentation
7. references
8. support
9. ongoing enhancements
10. vendor background and strength

#### **Second-Time Buyers Consider:**

1. support
2. vendor background and strength
3. training
4. documentation
5. references
6. ongoing enhancements
7. growth potential
8. ease of implementation
9. equipment
10. price

As these lists show, first-time buyers often ignore such details as support and training—and regret it later. Don't make that mistake. As you weigh your decision, don't forget to consider all the features on these lists.

Now, ask these questions about each company:

1. Does the company have local users similar to your organization?

2. Does the company provide ongoing support? If so, how much does such support cost?
3. Does the software meet your objectives?
4. What kind of training does the company offer?
5. What is the company's track record?
6. What kind of ongoing enhancements does the company provide with its software?
7. Is pricing within your reach?
8. Is the software compatible with your organization's size, data requirements, and current computer setup?

Use your answers to create a "short list" of the most promising candidates.

### 6 Request a Proposal.

Before asking any company for a formal proposal, consider calling the vendors on your short list to review your organization's needs in depth. These calls will give you a better feel for the *character* of the company. Pay particular attention to the questions *they* ask *you*. These questions can be an indicator of the software's flexibility and the companies' genuine interest in structuring a system for *you*.

Next, request a *services proposal* from the companies on your short list. Ask that the proposal include the following information:

1. at least five specific references
2. pricing details
3. a list of upcoming enhancements
4. details on the company, support, training, and conversions

Pay attention to the questions the software vendors ask *you*.  
These questions can hold important clues.



## Feel free to ask questions using specific scenarios.

- information on full implementation of the software

### 7 Check References.

This is a vital step because it verifies the information you've gathered. Call several people who are using the software you're considering. Ask them the following questions:

- Are you using the \_\_\_\_\_ system "live" with your data at the present time?
- If "yes," when did you "go live" with the software?
- When did you purchase the software?
- What challenges occurred during the conversion process, and how did the vendor handle them?
- How was your training handled?
- Did you and your staff enjoy the training? Why?
- Is more training required? Why?
- Would you have done anything differently during the implementation process?
- What kind of telephone support are you receiving?
- Would you change anything regarding support? What?
- Do you and your staff use the "Users' Manual?" If so, how?
- What are the three most important differences the software has made for you so far?
- What functions are the easiest for your staff to use? Why?
- What functions are the most difficult for your staff to use? Why?
- Were any representations made

during the sales process that weren't true?

- What has been the biggest surprise during the whole process?
- Would you purchase the software again? Why or why not?
- Have I missed anything important?

### 8 Hold a Demonstration.

You have now narrowed your decision to a few final candidates. Ask these vendors to demonstrate their software for you. Such demo sessions give you a chance to clarify information and see precisely how your work will be done. For the demo, do not hesitate to ask that your own data be used, and feel free to ask questions using specific scenarios. Request vendors' suggestions for improvement. Most important, involve as many users as possible.

### 9 Select a Package.

Once you have identified the system you plan to use, ask yourself one last time, "Do I feel totally comfortable with this decision?" If you don't, figure out why, and address those concerns with the vendor.

### 10 Implement Your New Software.

"Be sure to make the implementation schedule part of the deal when signing the final contract," Love suggests. There are many pieces to developing, converting, and implementing a new system. Having a schedule will keep the disruption in the office to a minimum.

"Once you have purchased the product," Love adds, "consider appointing a project leader to act as the point person."

Organization is the key to fundraising success. By investing the funds, time, and energy in automating your development program, you will reap the rewards for years to come. ■

#### Selected References

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 "Ten Secrets of Computer Wizardry," *Nonprofit World*, May-June 1994.  
 "What's New in Nonprofit Software?," *Nonprofit World*, January-February 1994.

These publications are available through the Society for Nonprofit Organizations' Resource Center. For ordering information, see the Society's *Resource Center Catalog*, included in this issue, or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).

### Where Do You Start Looking?

For a sampling of fundraising software packages, company names, addresses, and phone numbers, see the *Directory of Service and Product Providers*, beginning on page 31 of this issue.

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