



Tips for Choosing Relationship-Management Software

When managing relationships with your supporters, consider the advantages of Web-based software.

By Jay Moonah

Until recently, relationship-management software came in a box with a hard-to-follow manual and a CD-ROM to install. But times have changed: Powerful Web-based software packages, such as Google Docs or Salesforce.com, are changing the way organizations do business. Now, a number of Web-based packages are available to help manage your online and real-world interactions with donors, volunteers, members, and other stakeholders. Web-based software packages have a number of advantages—the ability to access and control your site from any computer, instant upgrades (usually without additional cost), and none of the other hassles associated with traditional “boxed” software.

How do you choose the package that’s right for you?

But the process of selecting Web-based software can be tedious and overwhelming. There are so many packages with different features and pricing models. How do you choose the one that’s right for you?

Define Your Needs

First, clarify what you’re trying to fulfill with your new software. State your need in terms of outcome rather than mechanics. So,

rather than saying, “I need to create a form that lets people donate,” say, “I need to take donations online.” The best way to achieve your goal is to consider your overall objective rather than looking for tools to accomplish tasks.

And don’t make the mistake of treating everything as a “must-have” item when in truth it may be “nice-to-have.” One good approach is to rate each need on a scale from 1 to 10, with 1 being something you could probably do without and 10 being a complete showstopper. It’s unlikely you’ll ever find a software package that does everything you want, so think about what you could live with instead of idealizing a package that may not exist.

Try It Out

Another great thing about Web-based software is that most vendors will offer a free trial account to let you see how the system performs. The more input you can get from the people who will be using the system, the better. Otherwise, your end users could wind up hating a system that’s been forced on them. Avoid this problem by taking full advantage of the trial period.

Think about More than Features

In addition to the specific tasks you need to perform, there are other important considerations when selecting any software, particularly Web-based software:

Ease of use. Some people will describe a piece of software as the simplest thing they’ve ever used; others will tear out their hair trying

to use the same software. Your best bet is to get a variety of people from your organization to try the package during the trial period. Find people whose level of technology experience is similar to those who will be using it. Don’t let your resident techie pass judgment on ease-of-use if the other users are computer novices.

Ask how passwords are stored.

Support. Ideally, you should have full access to support staff during your trial period. Don’t be afraid to contact them. Your experience with support is a critical part of your overall experience of using the software. If something goes wrong and you need help, can you count on the helpers? Be sure you know the answer before you commit to a package.

Reviews. Most software vendors post reviews or testimonials on their Web site. But that’s certainly not the whole picture. Look beyond their marketing. A quick Google search on a product name is likely to reveal some interesting reviews, good and bad. Also, check out some reputable

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Powerful Web-based software is changing the way organizations do business.

development process and identify features coming in future releases. You should also look into the history of previous releases. How often do they update their products, and what features have been added in the past?

Compare Your Options

Making an apples-to-apples comparison between software packages can be difficult. Wild Apricot has recently created an online resource to help with the process. You can download the Membership Software Selection Guide free at www.wildapricot.com/guide. Whatever software you end up selecting, do your homework to make sure it's something that will truly make your life easier. ■

directories, such as www.capterra.com, which maintains independent reviews of software packages so that you can easily compare them.

Vendor reliability. Understanding the company that's standing behind the software is important in assessing long-term viability. When you use Web-based software, you're storing your nonprofit's data on someone else's servers. This comes with many advantages, as we've outlined, but you need to know you're selecting a provider with staying power, one that won't disappear in six months. Look for a vendor with a track record, a good reputation, and a good leadership team. Also look at the existing customer base.

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If there are enough users of a product, it's less likely that anyone will shut it down. And just in case, find out how you can export your data, particularly donor information and donation records, if you choose to end your subscription to the service.

Security. Most relationship software systems don't store credit-card data; they leave that to the payment processing system. But if they do, ask about what security is in place to protect this valuable information. Also, ask how passwords are stored.

They should be in an encrypted database so that no one can read them even if your system is hacked.

Product roadmap. It's likely you'll never find one piece of software that meets all your needs today, and of course your needs can change over time. That's why it's important to understand the process that software providers use to improve their products. Ideally, they should be up-front about their



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