QWOCMAP looked at our Salesforce database to see if further customization would better meet our needs. (When people say Salesforce is free, I say “free like a stegosaurus herd is free.”) Ultimately, the cost to get a staff member Salesforce certified or hire a consultant on a regular basis, the challenges around Salesforce use, and the complexity of our data (particularly demographics and relationships) led us to looking for a new database. What’s below reflects our 6 months of research and outlines what was most helpful.

1. Articles from Idealware that helped our planning process, it led us deeper in order to answer questions and fulfill QWOCMAP's needs for the present and in the future. This helped us to develop a short list.
   1. The “Making Wise Decisions” toolkit (funded by the SH Cowell Foundation) came out 18 months after we made our decision. It parallels our process but doesn’t include interviewing engineers or test accounts, as described below.
   2. Other sources of information included Beth Kanter’s blog, NTEN (Nonprofit Technology Network), and Nonprofit Quarterly
2. QWOCMAP developed a comprehensive list of needs by program area and organization-wide (in terms of what kind of data we keep, what forms we use, the relationships between data, how many constituents/people/records, etc.). See below.
   1. This list helped us to think through our work processes (in terms of how we collect data, how we use it, and who sees it). It also allowed us to discuss possible solutions with the CRM companies.
   2. It is important to think about how you work and what is important to your organization and mission (not just a few users). Otherwise you'll end up with something really pretty but completely useless.
   3. Developing the list might take you some time. Knowing how people will use the system will get them to use it.
   4. Make the list, it is key!
3. We sent the list of to a list of around 10 different companies (including those I met at a conference), along with our budget constraints. For example, the system had to accommodate 15,000 records/constituents/accounts, cost less than $500 per month (preferably around $250-300), and with no more than 5% transaction fees (3% was ideal). Some quickly wrote back and said, "no, our service won't work for your budget, or your needs." This narrowed our list.
4. We went to Software Advice website and filled out their handy form about our needs using the needs list we already created to develop priority areas. Then we matched their recommendations against our short list to further narrow the field.
5. We did demos with our top 7 CRM companies, and treated it like an interview with tough questions and challenging scenarios in which we described our practices & processes. We talked to their sales people, and we spoke with their engineers. We used our list of needs for the product demos. Do not just listen to what the sales people tell you about what it can do. Pose a problem and talk and walk through a solution for how you work. Ask them to identify ways to simply or improve your processes. Most sales people can't answer all of these needs or your questions, so it is important that the list gets to the engineers to get real answers.
6. We created 3 test accounts with different companies and used our real data. After a month, if you decide to buy the CRM, then you can keep that account and the data in it, or start new. The test accounts allowed us to poke around the system, and see just how “easy” things really were, depending on what learned from the demos. We figured out emails, creating fundraising campaigns, how to customize demographic data, etc.
7. We chose our finalist, NeonCRM because because we wanted a system that could combine multiple things: individual and grant fundraising, ticketing, email outreach, and for us, earned income through a boutique film Distribution Program and online storefront. It also plays nicely with our website. At the time, we were able to get 95% of what we needed, and a few things that we really wanted, so we were ok with a few product limitations:
   1. Some of our historical data needed custom object functionality, which was in development for future release. Their team helped us to come up with a great work around. We got the chance to beta test the new release and now we’re in the process of data migration.
   2. There was no auction or text to give option. But now they have integrations with different companies that offer this service.
   3. With their app, we can use our phones and iPads to take photos of credit cards (which the system doesn’t store) to process donations and auction items at events.
8. Ultimately, we were able to secure grants to fund a 5-stage capacity building project. The grant for our CRM included the monthly fee, staff time, and training and consultation.
   1. As part of new staff onboarding, each person is assigned the Neon instructional video series and articles, as well as specific webinars/videos and articles to read based on their job. For example, the Distribution Coordinator really needs to know about the online store in their first week. The Development & Communications Manager needs to understand fundraising, email, and letters.
   2. If there is a more complicated issue, or process, then we use our consultation time.
   3. Our account allows us to get both email and phone support.
9. We decided to do the implement/data migration in stages. We spent time double checking/cleaning up data. Every 6 months we completed a data migration for a different program or area, such as donor information. This time allowed us to experiment, look at our practices & processes, develop solutions, and sometimes change how we work because we’re more efficient.
10. We continue to explore the system. We continue to look at how we work. We continue to improve our practices & processes. We continue to develop new ways to do things so that we can be more effective. For example, right now:
    1. deepening relationships with annual donors and converting them to monthly sustainers.
    2. dering how to do some direct mail pieces with certain donors that we’ve segmented based on length of time in their home/age
    3. we’re looking at automation and triggers that change an individual type (participant, donor, etc.) after they complete an action so that we don’t have to do it one by one (which invites human error).
    4. constituents can log in using their facebook and twitter accounts; we’re not sure how we can utilize this information to build better relationships.

**QWOCMAP CRM NEEDS list**

Filmmaker Training Program:

participant data

participants who become donors

participants who become volunteers

participants who become Mentors

participant projects/films completed

track community partners for program & each workshop

productions intake form

invoicing system for productions clients

integration of website forms (multiple: registration, intake for participants & clients, etc.)

individual donors; producers circle donors who are credited on each project

participants who join the QWOCMAP Productions team

surveys & evaluations

films created - title, synopsis, TRT, themes, etc.

Film Festival:

sponsors

community partners

community partner portal (social media graphics, text/blurbs, other info)

advertisements

in-kind donations

online & silent auction

volunteer (sign up form, shift assignments, training)

film submission form

childcare form

list of contracted services; ASL interpreters, etc.

venue information

individual donors

surveys & evaluations

Distribution Program:

film information (synopsis, themes, curated)

list of clients, organizations, departments, countries

intake form

invoicing

e-commerce for online streaming & digital licensing

digital downloads of study guides

individual donor premiums

community partners

surveys & evaluations

Organization-wide:

ALL funders, program & project grants

community partners

individual donors

volunteers

interns

board members & board portal

peer-to-peer fundraising pages

email newsletters

event registration  
ability to update webpages easily, including forms, surveys, new ecommerce, specific pages for donor campaigns, etc.