



7 Key Features to Look for

When Choosing a CRM Platform

for Your Nonprofit

frontstream™



If you run a nonprofit, you know how important it is to keep track of all the donations, pledges, volunteer opportunities, event participants, and constituent records. But it's not just about keeping track of all that data, it's really about using that information to build a strong community of supporters and cultivate relationships. That's why more and more nonprofits are investing in donor management software that's easy to use and highly effective.

As you explore ways to give your constituents the best experience possible, here are seven key features you should look for in a comprehensive donor management system. These features will help you make informed decisions as you engage with your current supporters and attract new ones.

1. Unlimited Constituent Records

Your donor management software should accommodate your nonprofit throughout every stage of growth. It's counterproductive when platforms cap your number of constituent records as your nonprofit brings in new supporters—no nonprofit should suddenly receive an unexpected bill simply because it's growing support for its cause! You deserve all the features available to best manage and engage your donor base.

Look for a CRM system that allows you to:

- **Accommodate growth.** As your organization grows and attracts more donors, you will need to be able to manage the data for each of them. With unlimited records, you don't have to worry about hitting a cap and having to start over or having to pay for more as your nonprofit grows.



[BiddingForGood by FrontStream](#) is a unique marketplace designed specifically to aid unlimited growth by connecting organizations to a community of over 1.7 million philanthropic shoppers that have helped raise over \$5.2 billion dollars for charities. Not only do we believe your support should be limitless, but we also automatically include access to growth-fueling features like BiddingForGood in our all-in-one fundraising and donor management platform.



2. Donation and Pledge Management

We all know raising funds through donations is essential for charities as they dedicate resources to making good happen for others. So, it's necessary that your CRM software comes with powerful donor and pledge management components.

Look for a CRM system that allows you to:

- **Create beautiful donation pages** along with donate buttons you can embed directly on your website. When all your webpages are seamlessly in sync with your branding and messaging, it is easier for donors to trust and navigate the giving process.
- **Streamline and automate** your fundraising processes: track donations, process payments, reconcile receipts, and update donor information. With solid donation and pledge management in place, you'll save time and reduce the risk of manual errors, making your organization more efficient and effective.
- **See how much money you've raised**, where it's coming from, and how it's being used. A CRM platform that offers you more transparency can help you make informed decisions about your fundraising strategy and build trust with your donors.
- **Make more accurate predictions** about future fundraising efforts. This helps you plan your resources more effectively and ensure that you have the resources you need to achieve your goals.



Every organization that has partnered with FrontStream (for the past 20+ years!) benefits from our built-in, proprietary payment gateway. This means organizations never have to run around, calling and emailing various companies only to be met with radio silence when they have a question about their funds.

3. Relationship Tracking Between Individuals, Households, and Employers

To develop a deep understanding of your donors, you want to track not only individuals but also households and employers, and cast a wider, hospitable net.

Look for a CRM system that allows you to:

- **Hone-in on segmentation.** With relationship tracking, you segment your donor base in more nuanced and effective ways. When you tailor your outreach and engagement efforts accordingly, you'll start to increase donor engagement and loyalty in the long run.
- **Level-up on efficiency.** Relationship tracking also lets you easily manage and analyze information on multiple individuals within a household or workplace, saving you time and resources.
- **Gain valuable insight** into your donor base, including which households and employers are most engaged and what motivates them to give. This allows you to make data-driven decisions to improve your fundraising efforts and increase your impact.



4. Fundraising Event and Campaign Tools

A solid donor management system should integrate seamlessly with fundraising and campaign tools that are automatically included along with your CRM.

Look for a CRM system that allows you to:

- **Create successful fundraising events and campaigns** within one a digital platform. Tools that work together to make it easy to manage all your fundraising and campaign needs—like auction management, variable event registration and ticketing options, peer-to-peer, and DIY campaigns—from the same place you access your CRM are optimal for any organization with a growth-driven mindset.



Seek out an all-in-one fundraising and donor management platform like [Panorama by FrontStream](#) that allows you to create an unlimited number of fundraising events and campaigns at the same time. This is especially great for letting supporters run their own DIY fundraising events on behalf of your organization, even while you have other, larger events going on simultaneously!

- **Harness the power “oneness.”** One set of user permissions. One set of donor records. One accurate source that doesn’t involve losing data and key metrics due to endless, manual exporting and importing.

5. Volunteer Portal with Registration, Scheduling, and Tracking



Volunteers play a vital role in helping you achieve your goals and are especially invaluable for running your fundraising events smoothly. However, managing a volunteer base is a complex and time-consuming task if you're using manual methods, spreadsheets or disparate systems. That's why having a volunteer portal with registration, scheduling, and tracking integrated into your donor management software is so important.



Since so many volunteers are also donors, having all your volunteer and donor information in one, easy-to-access place helps you create a complete view of your organization's relationship with each supporter.

Look for a CRM system that allows you to:

- **Save time and resources** by registering volunteers, scheduling shifts, tracking hours, and communicating with volunteers all in one place. You also want to make sure your volunteer management allows you to easily vet and approve volunteers' background histories with a few simple clicks.
- **Improve the volunteer experience** so they're more likely to continue donating their time to helping your cause in the future. A user-friendly interface with clear instructions will make it easy for volunteers to sign up, select shifts, and log hours minus any frustration.

Bonus: Look for a CRM platform that allows volunteers to enter in their interests and hobbies so you can better align individuals with tasks and events that are right up their alley.

- **Track volunteer hours** and involvement in real-time. Cutting back on manual logging is convenient for both you and your volunteers.
- **Enhance communication** with your volunteers and keep them informed about upcoming opportunities and events. With a solid volunteer portal, you can also send out reminders and updates, ensuring that volunteers are always in the loop.



6. Segmented Mailing Lists and Customizable SmartLists

Segmented mailing lists and customizable SmartLists are a game-changer:

By creating different reports on various segments of donors and corresponding to them accordingly to determine what type of communication is most fitting for different donor groups, you ultimately improve donor retention, manage resources better, and provide valuable insights into your donor base. By using both as part of your donor management strategy, you will improve your outreach efforts, increase donor engagement, and set up your organization to ultimately achieve your team's fundraising goals.

Look for a CRM system that allows you to:

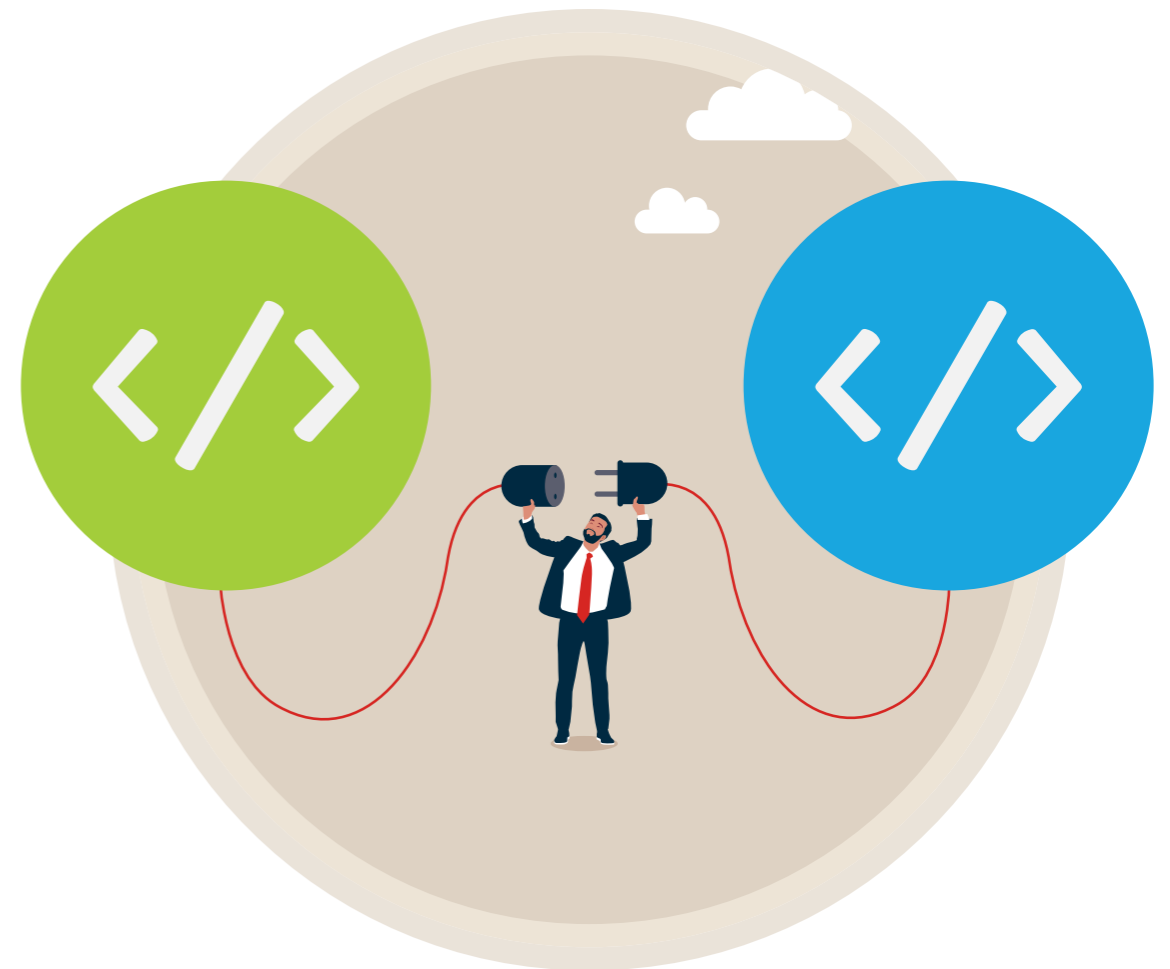
- **Improve targeting** with segmented email lists and SmartLists. You will work smarter—not harder—with more targeted communications based on specific donor characteristics, such as giving history and location.
- **Enable personalized, relevant messaging**, which increases donor engagement and leads to stronger relationships with your supporters. Sending tailored content that resonates with each donor group also makes your communications more relevant and impactful.
- **Improve ROI!** When you send more targeted and relevant messaging that lead to higher engagement and conversions, you also improve the return on investment (ROI) of your email marketing campaigns.

7. Software Integrations

By allowing integrations with other platforms, such as QuickBooks®, Constant Contact®, and Mailchimp®, donor management software streamlines processes, automates tasks, and provides a more comprehensive view of donor engagement and activity. This not only saves time and reduces manual effort but also helps to provide a better overall donor experience that increases the impact of your fundraising efforts.

Look for a CRM system that allows you to:

- **Improve** efficiency with integrations that offer up a seamless flow of information between different systems, eliminating the time and effort required for manual data entry. This leads to improved efficiency and accuracy in the management of donor information.
- **Provide** donors with a more personalized and streamlined experience, such as allowing them to make donations directly from your website or via a mobile app.
- **Unlock** richer donor insights with CRM that “plays well” with other systems, like accounting software, so you can access a wider range of data, which can be analyzed to gain insights into donor behavior and support more informed decision-making.



BONUS features you should also insist on when choosing your CRM software



Training and Support

No matter how intuitive your fundraising software is, the better you understand it, the more effective your fundraising will be.

- Look for a software partner that offers a personalized onboarding process with training, an extensive online support library, ongoing technical support, and on-demand “How To” videos.



Security

Online security is a top priority for nonprofit organizations.

- Protecting your donors’ personal information from getting leaked or hacked is of utmost importance for any organization. The payment processor you use with your CRM and fundraising software technology should provide the highest level of security available in the industry. Choose a provider that is PCI Level 1 Audited so you can rest easy knowing your donors’ information is protected.

FrontStream's digital, all-in-one donor management and fundraising solution makes it easy for you to...



Design and deploy your nonprofit fundraising event through intuitive, drag-and-drop technology to create a frictionless, donor-friendly user experience.



Drive brand loyalty by customizing all digital channels, including webpages, donation forms, mobile bidding pages, thank you emails, text reminders and more.



Receive, track, and process payments with the industry's most secure, PCI Level 1 Compliant integrated payment processing platform.



Measure your fundraising efforts across all campaigns with robust reporting and analytics insight that enables you to continuously improve your activities to extend your mission's impact.



Experience and enjoy meeting your fundraising goals and plan ahead for your next campaign.

Check out the CRM features FrontStream offers:

- ✓ Unlimited Constituent Records
- ✓ Volunteer Portal with Registration, Scheduling, and Tracking
- ✓ Segmented Mailing Lists and Customizable SmartLists
- ✓ Relationship Tracking Between Individuals, Households, and Employers
- ✓ Donation and Pledge Management
- ✓ Software Integrations
- ✓ Top-notch Training and Support
- ✓ Highest Security in the Industry

frontstream™

**Are you ready to take your donor management
and organization to the next level?**

**Request a
demo today!**