SHOP GUIDE

for foundation software technology

This guide is designed to educate, inspire, and get you thinking bigger about your foundation's technology. Discover ***12 CRM Features That Radically Improve Your Foundation Technology***, how your current system stacks up, and what to be on the lookout for to make the best possible decision for your foundation's technology needs.

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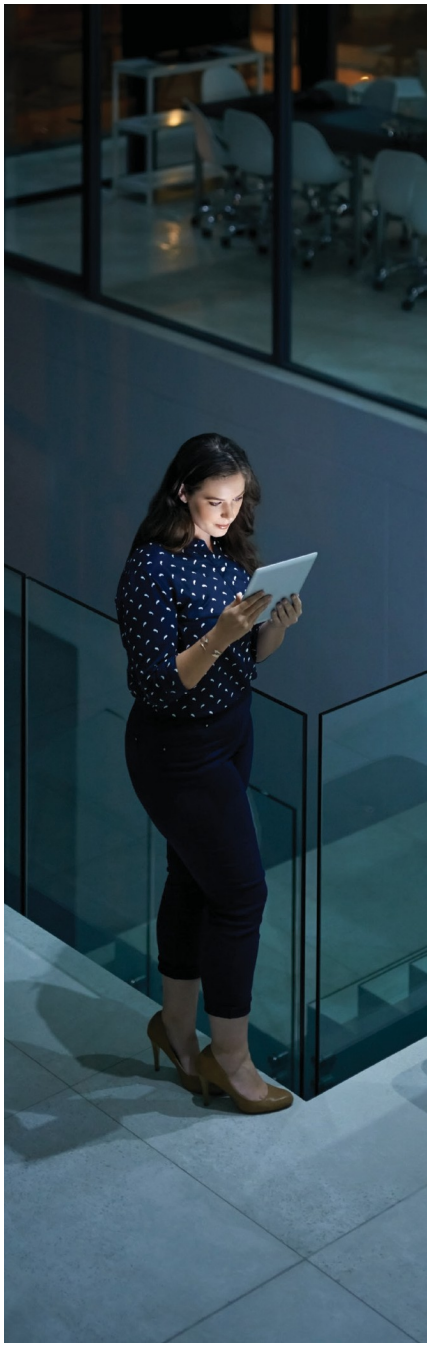


Whether you have been using foundation software for several years or are new to exploring what technology can do for your foundation, this guide is designed to help you evaluate your options and maximize output from your technology solutions.

In recent years, software options have become increasingly integrated — instead of patchworking multiple dashboards, systems, and features together, comprehensive software systems allow you to combine relationship management, accounting, communication, and more into one, universally-accessible database. These new developments leave much to be desired in older, limited technologies which often cost foundations' valuable time and money.

It all begins with Constituent Relationship Management (CRM). Connections and relationships are at the core of every foundation. You look at your supporters as more than a name and number on a spreadsheet, they're the backbone of your foundation. Your software needs to be as responsive to your relationships as you are. In fact, we think CRM is so important, it's the basis of every feature in this shop guide.

This guide is designed to get you thinking bigger by exploring the possibilities available to you through comprehensive **foundation software. The following list is based off more than** 40 years of foundation software experience and innovation, providing comprehensive tech solutions for hundreds of **clients. Curated specifically for foundations and grantmakers, the following CRM features will radically improve efficiencies,** promote better relationships with your constituents, and get foundations back to doing what matters most — inspiring philanthropic community.

"We were looking for grants management software, but then you lit up our whole concept and helped us realize we needed foundation management software. Now we are excited to be even more successful than we originally thought we could be."

– Gary Romero, Virginia G. Piper Charitable Trust, Phoenix AZ

Features 1-3 are all about the basics. Often the simple features are the most overlooked, and yet, these tools can be the most important for foundations.

1 Universal Accessibility of Your Contacts

CRM at its most basic level is designed to keep track of your constituent contact information. Some foundations choose to use **spreadsheets, paper files, or their personal email to house their** contacts, often resulting in lost or duplicate contacts and time wasted creating updates across platforms. Other foundations opt to use a grants management system for housing grantees, often **leaving out other important contacts such as volunteers, policymakers, or influencers.**

Key solution: Look for software that has universal accessibility of your contacts. It is essential that you have access to your constituent contact info anytime, anywhere beyond just grantees. And when a change is made to the record, that it is universal to *any* record of a given contact.

How does my current technology stack up?

- ✓ Universal record-keeping of contacts.
- ✓ Housing of all constituent relationships, not just grantees.

2 Checks and Balances with Data Security and Integrity

Many organizations do not look at security beyond being a firewall for their data. Yet, data security and integrity can play an important and effortless role in protecting foundations, from constituents being able to know why their data is being used and opt-out of the database to tracking of record changes and removal of duplicates.

Look for a CRM that allows for simple check-and-balance measures, such as the ability to create conditional permissions with a timeline. Where, for instance, a foundation would be able to specify that four days after a grant decision is made, data to that record cannot be changed.

How does my current technology stack up?

- ✓ Audit trails: ability to track changes to data.
- ✓ **Duplicate finder: ability to find and merge duplicate records.**
- ✓ **Field-level permissions: allows assigned levels of staff access to data.**
- ✓ **Conditional permissions: ability to change access to data based on specified** conditions or timing.

3 Go Beyond Conventional Connections

CRM is more than just a place to store contact names and addresses. Robust CRM can take you beyond the conventional to weave a total picture of people and their connections to organizations, grants, gifts, funds, loans, committees, events, and more.

Let's say you would like to gather some quick insights on a recent grant. Instead of the conventional list of grantees, imagine instant access to the full picture of the grantee, collaborating organizations, consultants **on the project, financial advisors, and more. You can even view timelines, such as** constituent's board membership term.

How does my current technology stack up?

- ✓ CRM that allows me to connect people to everything else in my database.

Features 4-7 take us beyond the basic, to business-related features intuitive to the needs of foundations. This is often an area where "one-size-fits-all" CRM systems stop stacking up.

4 Total View of Constituent Transactions

Most foundations think and use their CRM as a digital rolodex or just a list of grants and gifts. But what if a CRM could bring you more?

Imagine a last-minute phone call with an important stakeholder. Within seconds of typing their name into your database you have a full list of contact information, giving history, the last event attended, membership or committee status, and so on. Perhaps you notice in your quick search that this individual never misses the annual fundraiser but did not open this year's email invitation, so you mention the details of the event on the call and email a follow-up RSVP to secure their attendance.

With instant accessibility to see all transactions between constituents and your foundation, the greater the ability to customize communication and prompt further involvement.

How does my current technology stack up?

- ✓ CRM that gives me a total picture of my constituent transactions in one place.

5 Easy Tracking of Activities

Tracking phone and email correspondence can be tedious and time-consuming for most foundations, often involving cut-and-paste or hand entering notes. Some foundations opt not to to it altogether, missing out on opportunities to nurture relationships.

Key solution: Employ a CRM that tracks all of your communication activities, across phone, email, and appointments with a click of a button. When shopping around, look for a system that copies emails directly to the database, so that emails deleted from individual inboxes are still captured in your data.

How does my current technology stack up?

- ✓ Constituent phone, email, and appointment tracking with the click of a button.

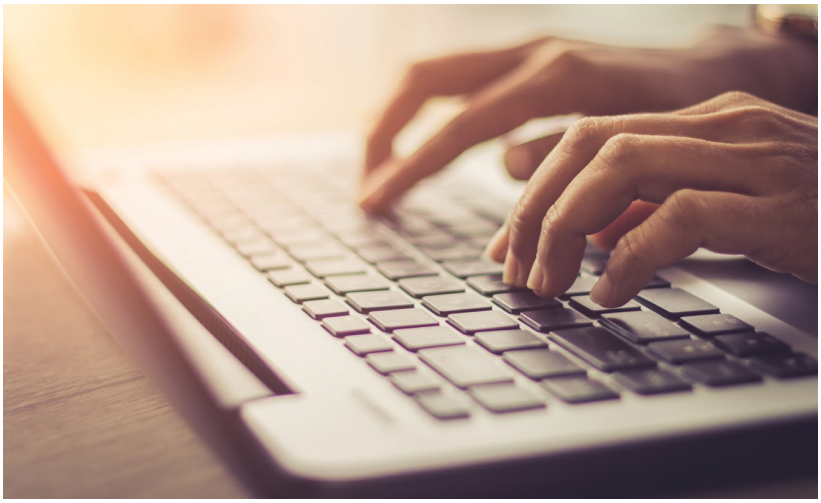
6 Seamless Integration with Outside Data

Software can vary greatly on its ability to integrate with other data systems, such as GuideStar, Geographic Information Systems, **financial services, and more. Often software is sold as "integrated,"** and yet requires import and exporting of data or checking multiple portals to get the most recent updates to your data.

Look for a CRM system with seamless integration of outside data. Imagine your database accessing and reading all of your daily credit card transactions from Authorize.net. Every evening the donor gift records are auto-updated for you and thank you cards printed and waiting for you to send in the morning.

How does my current technology stack up?

- ✓ Ability to track, view, and share outside data within my database.
- ✓ Seamless integration with GuideStar, Geographic Information Systems, **financial services, Remote Deposit Capture, ACH payments, and more.**



Features 7-9 are all about how you view and present your data. Visuals play a key role in how we draw insights from data and how we communicate this information with others.

7 Built-in Marketing

Imagine a software where marketing communications are an extension of your CRM, not just an afterthought. Immediately view delivered, opened, and clicked-on emails by contact. Create automated triggers, such as an emailed invitation to an upcoming event when a newsletter article is clicked on.

How does my current technology stack up?

- ✓ Total integration with email marketing providers.
- ✓ **Ability to track, view, and respond to marketing efforts within my database.**

8 Powerful Views and Reporting

What's the point in tracking data if there's an inability to draw information from it? Just as important as tracking data is the ability to view, sort, and form insights from it.

Key solution: Ensure your software allows you to view and create powerful reports from your data. Make sure your CRM provides **you with 1) "Views" or snapshot visuals of your to-the-minute data and 2) An ability** to generate, sort and summarize data into presentation-quality visuals for your stakeholders.

How does my current technology stack up?

- ✓ Powerful snapshot views of my data.
- ✓ Ability to generate, sort, and summarize data into presentation-quality visuals for easy sharing with stakeholders.

9 Single Portal, Global Search

Think of this as Google of your own database. With a single keyword you can access any record related to that topic, contact, or organization — instantly. Ensure this feature allows you to list donors, committees, email, notes, and more of a given topic.

How does my current technology stack up?

- ✓ A global search function that allows me to see everything in my database at once.

Features 10-12 take your foundation's CRM system to the next level, through advanced features that propel effectiveness while reducing workload.

10 Rule Your Business with Business Rules

The ability to customize conditional data, or the presentation of conditional data through business rules, is where foundations can truly access CRM that is supportive to their unique business needs.

When shopping for a CRM system, look for the ability to update forms based on conditional data, including set/clear, show/hide, and enabling/disabling of form **fields. You will also want the ability to set field-level requirements and view where** you are at within a given business process.

Picture this: A form for a grant in-process is customized to automatically disable **staff comments after the review period ends. Anytime a denial reason is filed in the** database, a prompt to call the grantee pops up on your screen. Through a process view in your database, you can easily see that to move to the next step in the grant process, you are awaiting CFO approval.

How does my current technology stack up?

- ✓ Ability to customize conditional data, and its presentation, with business rules.
- ✓ Easily view where you are at in a business process and what's required to unlock the next steps.

11 Automated Workflows

Foundations often drain most of their time and energy into processes that can be automated through more-advanced CRM systems.

Shop for a CRM system that helps you to work smarter, not harder, **with automated workflows. Imagine being on a beach in Hawaii when a $700 gift is received. Through your automated workflow, a notification is sent** to the CEO and board solicitor of the gift and a task is created for the Development Director to call the donor, all while you enjoy the warm sun.

How does my current technology stack up?

- ✓ **Ability to create automated workflows that do the work for me.**

12 Anytime, Anywhere

It's time your CRM takes you beyond the office.

Look for a CRM system that you can take with you on your home computer or mobile devices. Envision being able to look up and edit records on your smartphone in line at **the coffee shop. Imagine leaving a donor appointment and walking to your car while** you dictate your meeting notes directly to your smartphone. Before you are even **back in the office, your colleague has already sent the invite for a follow-up meeting.**

How does my current technology stack up?

✓ CRM available anywhere I am.

13 Bonus: The Future of CRM

Another factor to consider when making technology decisions for your foundation, **is where CRM technology is headed. Through the latest developments in artificial** intelligence (AI), CRM will become even more intuitive to individual needs. For instance, let's say your database recognizes a pattern within your constituent data that you have a tendency to phone a donor monthly. After 35 days of no recorded phone calls **to the donor, AI within the system prompts a reminder notification on your screen** recommending a phone call to the donor.

How does my current technology stack up?

✓ CRM that grows with me.

SHOP GUIDE AT-A-GLANCE

Type	Feature	Checkbox
Basic	**Universal Accessibility of Your Contacts** ✓ Housing of all constituent relationships, not just grantees. ✓ Universal record-keeping of contacts.	
	Checks and Balances with Data Security and Integrity ✓ Audit trails: ability to track changes to data. ✓ **Duplicate finder: ability to find and merge duplicate records.** ✓ **Field-level permissions allows assigned levels of staff access to data.** ✓ **Conditional permissions: ability to change access to data based on specified** conditions or timing.	
	Go Beyond Conventional Connections ✓ CRM that allows me to connect people to everything else in my database.	
Business	**Total View of Constituent Transactions** ✓ CRM that gives me a total picture of my constituent transactions in one place.	
	Easy Tracking of Activities ✓ Constituent phone, email, and appointment tracking with the click of a button.	
	Seamless Integration with Outside Data ✓ Ability to track, view, and share outside data within my database. ✓ Seamless integration with GuideStar, Geographic Information Systems, **financial services, Remote Deposit Capture, ACH payments, and more.**	
Visual	**Built-in Marketing** ✓ Total integration with email marketing providers. ✓ **Ability to track, view, and respond to marketing efforts within my database.**	
	Powerful Views and Reporting ✓ Powerful snapshot views of my data. ✓ Ability to generate, sort, and summarize data into presentation-quality visuals for easy sharing with stakeholders.	
	Single Portal, Global Search ✓ A global search function that allows me to see everything in my database at once.	
Advanced	**Rule Your Business with Business Rules** ✓ Ability to customize conditional data, and its presentation, with business rules. ✓ Easily view where you are at in a business process and what's required to unlock the next steps.	
	Automated Workflows ✓ **Ability to create automated workflows that do the work for me.**	
	Anytime, Anywhere ✓ CRM available anywhere I am.	

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