EXECUTIVE SUMMARY
INSIGHTS INTO CRM FOR NONPROFITS

HELLER CONSULTING

Recently, Heller Consulting sought to find out more about how nonprofits are thinking about and approaching Constituent Relationship Management (CRM). Over the course of several months, we interviewed executives from 30 organizations to uncover their thoughts on their strategic, operational and technical goals, activities, and challenges within the context of CRM.

Here are some of our top findings from our conversations:

1. **Nonprofits' definitions of CRM vary significantly.** Participants view CRM as everything from a database and related processes to a focused approach on delivering constituent service or a proactive strategy to engaging with constituents.
2. **Many organizations have to devote substantial time and resources just to keep their existing technology systems going**. This leaves them less time to engage with constituents, provide top-notch service and consider CRM more strategically.
3. **Participants' existing technology systems aren't supporting their new strategies**. Nonprofits typically are pursuing some form of CRM due to dissatisfaction with their current systems as well as the desire to implement new strategies.
4. **Disparate systems and scattered data are top challenges with large nonprofits.** Organizations are facing significant challenges with fragmented (versus consolidated) technology, information, processes and strategies.
5. **Nonprofits believe CRM will allow analysis of, and support improvement in, strategic areas.** They expect CRM to help them improve their fundraising, deepen constituent engagement, and have greater ability to deliver their programs more broadly.
6. **Almost all nonprofits point to changes in technology as enabling their organizations to move toward some form of CRM.** They agree that today's technology offers better solutions, often at lower prices, than in the past. They most frequently mention integration, business intelligence tools, web-based point solutions, and the Cloud as part of this discussion.
7. **Organizations view "people" as one of the greatest challenges in implementing CRM.** They anticipate everything from unrealistic expectations of CRM to poor data confidence as "people" challenges that might impede their CRM initiatives from moving forward.
8. **Nonprofits universally agree that executive management and the board must provide leadership for a CRM initiative.** Executives and the board provide vision, consistent communication, appropriate resources, and the stability to help ensure success of a CRM initiative.
9. **Most participants are in some stage of planning for a CRM system.** About one-third of participants have moved forward with some aspect of CRM implementation.

View the full report at **www.theconnectedcause.com/CRMinsights**

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