YOUR GUIDE TO SELECTING FUNDRAISING SOFTWARE

A step-by-step approach to finding
the right software for growing nonprofits

blackbaud®

f ✗ in

CONTENTS

There are four main steps
to take when selecting software
for your organization.

✓

This guide will help you
identify and match your needs with
a software solution best suited for you.

✓

Each step is important in
the decision-making process.
Learn more in each chapter.

CHAPTER 1
Defining Priorities

Defining your priorities allows you to clearly state what you need from a solution and where you want it to take your organization.

Remember, this is a long-term investment!

Your requirements should reflect a holistic view of the organization. This will help you avoid unintended consequences and obtain buy-in from all impacted teams.

f y in

What to Look for in Fundraising and Donor Management Software:

✓ It's tuned into your wavelength.

Make sure you select a solution that's designed specifically for your nonprofit needs and fundraising workflow.

✓ You're up and running in no time.

Be sure you can figure out how to run the user interface without tons of training.

✓ You get metrics that matter, fast.

Quality reports are a key feature of any good donor database system.

✓ It's got the right real estate.

Will you only use software on office computers? Or do you prefer a smart cloud solution that's accessible anywhere? Make sure your system lives in the right place.

✓ You won't hunt high and low.

Check to ensure that you can perform search queries without signaling an SOS to support.

✓ It meets your needs. And your budget.

Make a list of features that you need to have, features that would be nice to have, and features that you don't need at all. Align your software accordingly.

✓ It plays well with others.

You work with a lot of programs and systems. Select a solution that integrates with as many of them as possible.

✓ It's got data security on lock.

Ask these questions of the software you're considering: Where is the data stored? How is it shared? Who has direct access? How safe is the cloud?

✅ It can move it, move it.

Make sure your fundraising software offers the ability to easily import and export donor information.

✅ You're prepped for success.

You should be able to get great in-person, online, or written training to hit the ground running quickly.

✅ You get 24/7 tech support troopers.

Will you have backup? Your package should include round-th-clock support, for a flat monthly or yearly fee.

✅ You can test drive performance.

Request demos, product tours, and current user opinions to determine how user-friendly the software is.

✅ You'll rock some major ROI.

Smart nonprofits know that when it comes to the software's price, the real value is its return on investment.

› Learn how Blackbaud's leading fundraising and donor management solutions can be a great fit. Contact us today!

CHAPTER 2
Gathering Requirements

Getting your requirements correct can be the difference between ending up with a solution that moves your organization forward and one that holds you back.

This is the MOST important step in the partner selection process!

f 🐦 in

Tips on How to Gather the Requirements You Need:

✅ Include decision makers

✅ Define current processes

✅ Identify gaps

✅ Understand your stakeholders' ideal world

✅ Gauge your stakeholders' technical capabilities

✅ Prioritize your stakeholders' wish list

✅ Monetize or enumerate wherever possible

✅ Tie back to organizational goals

Who to Involve

➤ **EXERCISE:** Make a list below of your key stakeholders—anyone potentially impacted by the new solution and those who may benefit from the software purchase.

_____   _____

_____   _____

_____   _____

Make a list of your requirements.

At a minimum, you should consider these requirements before approaching a software partner:

Budget
Define a range, do online research, get insight from stakeholders and peers

Timeframe
Establish realistic timeframes for the search, evaluation and implementation phases

Current and Future Goals
Consider anticipated growth, staff and access levels, and associated expectations

Resource Requirements
IT requirements, customizations, upgrades, system maintenance, other integrations

Functional Requirements
Donor relationship tracking, integrated online payments, easy reporting, robust analytics

CHAPTER 3
Vendor Evaluation

Your approach to evaluating potential software partners should match your needs.

Every organization's evaluation process will differ depending on:

- ✔ Organization complexity
- ✔ Workflow complexity
- ✔ Risk exposure
- ✔ Level of investment

Basic Vendor Evaluation Process:

✅ Notify vendors of interest

✅ Schedule requirements discussion
(prior to demo)

✅ Schedule demo with key stakeholders

✅ Follow up to get stakeholders' feedback

✅ Score each vendor using a scorecard

✅ Select a finalist

Prepare for vendor demos.

Be prepared when asking a potential solutions partner to provide your organization with a demo. Ensure that you prepare both the vendor and your organization.

Set expectations ahead of time and make sure the right people are in attendance from your organization.

Complete vendor scorecards.

Create a vendor scorecard, and list out your evaluation criteria.

Total cost, software, implementation, training, and IT should be amongst the criteria you consider.

CATEGORICAL SCORES	INDIVIDUAL CRITERION	SHOWSTOPPERS
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

CHAPTER 4
Selection

You've done it!

You know what you require and have seen what potential partners can offer you. Now is the time to make your selection and move forward in choosing a solution that will make your daily work tasks much easier.

Before signing, make sure you get:

✔ Internal buy-in

✔ Statement of work from the vendor

✔ A clear process for internal sign-off, including approval from the finance and legal teams as well as your board of directors

We're revolutionizing fundraising and donor management technology!

The Blackbaud product portfolio has recently undergone a major improvement initiative and now offers a true, best-in-class experience across the board. From the fresh, consistent interface that our recent SKY UX™ adoption brings to enhanced workflows and analytics, our products are fully loaded with the innovation, intelligence, and insight you need to focus on donors and not on your database. Our comprehensive fundraising and donor management portfolio can meet the needs of your growing organization. Discover solutions that fit your organization today!
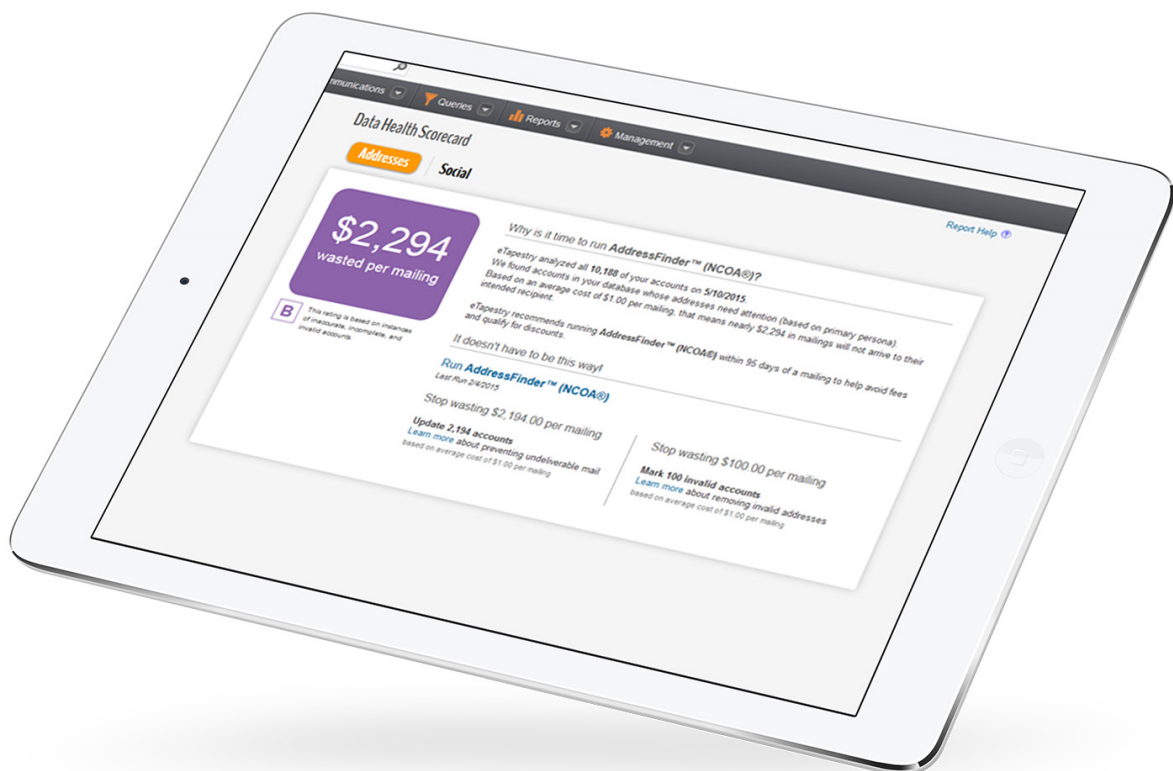
CHAT WITH A SPECIALIST ❯   **REQUEST MORE INFO** ❯

About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, foundations, corporations, education institutions, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through software, services, expertise, and data intelligence. The Blackbaud portfolio is tailored to the unique needs of vertical markets, with solutions for fundraising and relationship management, digital marketing, advocacy, accounting, payments, analytics, school management, grant management, corporate social responsibility, and volunteerism. Serving the industry for more than three decades, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, Ireland, and the United Kingdom. For more information, visit www.blackbaud.com.

13