SC&H GROUP

Expertise that Works

Not for Profit Summit

Keys to Effective Customer Relationship Management for Non-Profits

Agenda

- Five Keys to Effective CRM

- CRM Initiative Pitfalls

- Key Features in Not for Profit CRM

Five Keys to Effective CRM

1. Vision

2. Executive Sponsorship

3. Evolution not Revolution

4. SME Participation

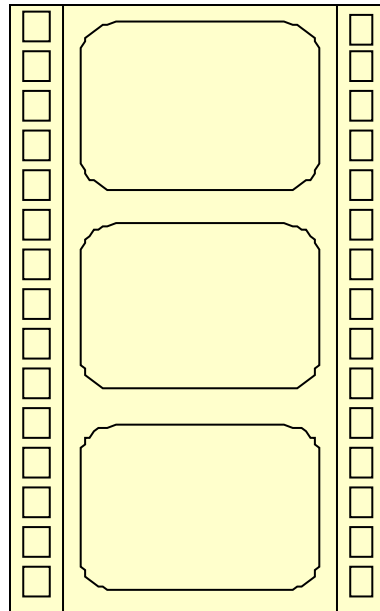5. Implementation Team

Key 1: Vision

- CRM is a strategy and philosophy, not just a software application

- Customers (Members, Constituents, Donors, etc.) at the heart of everything you do

- Know your customers

- Create raving fans

Key 2: Executive Sponsorship

- Vision must start at the top
- CxO Support

- Why?
  - If the key executives aren't committed, why should anyone else be?

Video
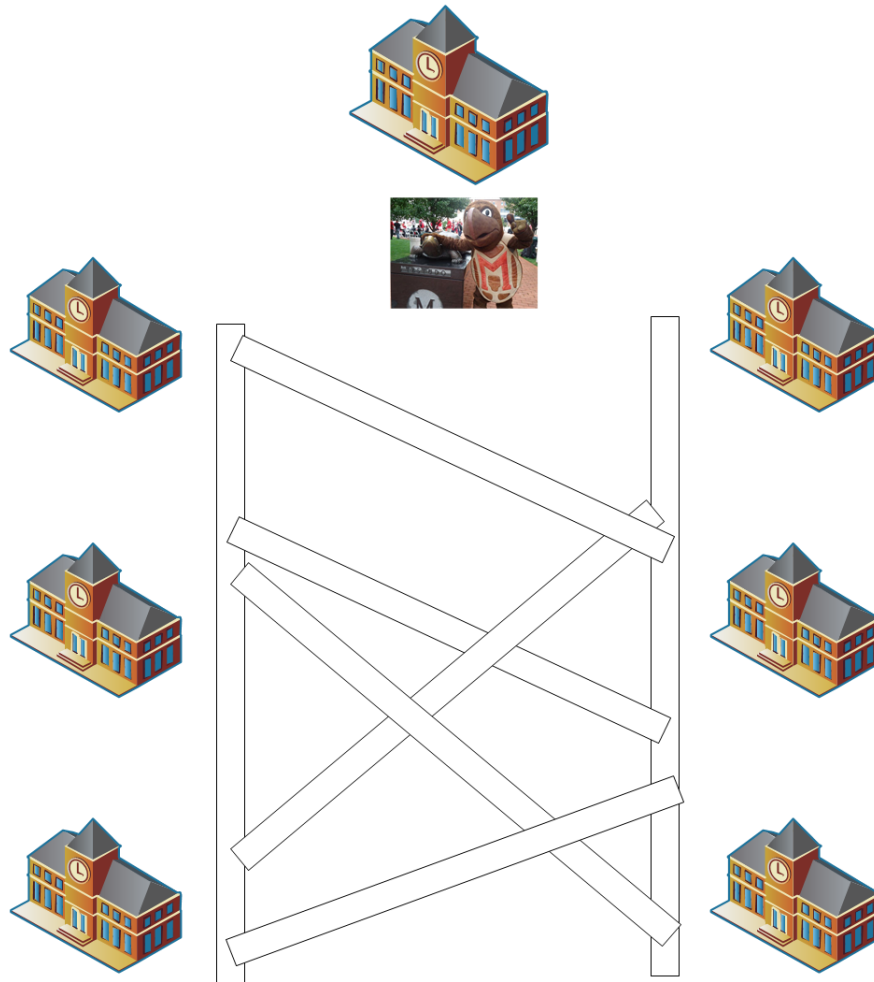

**Watch the
Video
Test Yourself**

Key 3: Evolution not Revolution

- Crawl, Walk, Run

- Don't try to put every feature you THINK you need in Ver. 1.0

- Agile Methodology

- Collect Feedback from Users

- Plan for regular, periodic design refresh

Natural Paths

Natural Paths

Key 4: Subject Matter Expert Participation

- SMEs are the people who best understand the work and tools needed

- Like the CxOs, they are leaders…others will follow

- You have to make the time investment

Key 5: Implementation Team

- Understand your business

- Proven methodology

- Deep business expertise

- Deep technical expertise

CRM Initiative Pitfalls

- Lack of User Adoption

- Flawed Design

- Cost Overruns

- Vision

- Executive Sponsorship

- Evolution not Revolution

- SME Participation

- Implementation Team

Key Features in Not for Profit CRM

- Associations
  - Member Management Features

- Charities
  - Donor Management Features

Member Management Features

- Member Recruiting
- Membership Tracking
- Membership Renewals

- Event Management
  - Planning
  - Marketing
  - Tradeshow/booth mgmt.
  - Seminars, tracks
  - Registration Management

- Member Engagement
  - Member self-service
  - Email Notifications
  - Support
  - Multi-Channel
    - Phone, Online Chat, Email
  - Social
    - LinkedIn, Twitter, Facebook

- Education
  - Courses/Classes
  - Certification

Donor Management Features

- Outreach
  - Multi-channel
    - Phone, Online Chat, Email
  - Social
    - LinkedIn, Twitter, Facebook
    - Social Engagement, Metrics
  - Website
    - PPC
    - SEO/Organic Search

- Campaign Management
  - Planning
  - List Management

- Donor Service
  - Contribution Reporting
  - Charitable Impact Metrics
  - Self-service
  - General Support

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