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Finding the Right Donor Management System

Where do you want to be in 2-5 years, and how does fundraising fit into your strategic plan? Are your fundraising efforts limited by your current donor management tools? If so, how can you find the right solution that meets your organization's needs and budget constraints?

Experts from Bloomerang, TrailBlazer and Raiser's Edge shared some insights on trends in nonprofit fundraising during our Winter Conference in Clearwater Beach. They also offered the following tips to help members successfully select and manage a donor management system that meets their needs.

Evaluate

New software won't compensate for bad data, poor business processes, or lack of communication and training - it will just highlight these problems. Think about what you currently have and do a SWOT analysis to figure out if you need a whole new solution or just an upgrade to your existing system. You may find your current system is fine and you just need to invest in staff training to get the results you want. If you determine you need a new software solution, think about what you need, what you would like, and what you can afford. When thinking about the budget, be aware of [The True Cost of Free and Low-cost](#)

Engage

Stakeholder consensus is critical to successful adoption. Get input from all levels of the organization and make sure every department that uses the system is represented: development, marketing, volunteers, IT, C-suite, etc. These stakeholders can help you benchmark your current activities and results against others in your industry and identify your most critical needs.

Search

You can narrow your search by focusing on the functionality required to meet critical needs. Don't be enticed by bells and whistles that aren't on your list, and don't compromise on essentials. Once you have a list of potential tools that meet your essential criteria and are within your budget, schedule vendor demos and [*ask the right questions*](#).

Plan

One of the most common mistakes organizations make is failing to plan beyond the purchase. You need a realistic 30-60-90 day adoption strategy and a plan for ongoing training, maintenance, measurement and celebration.

Clean

Resist the urge to move all of your existing data into the new system. If you have contacts that haven't contributed or otherwise engaged with your organization over the past two years, archive them so they are not part of your active donor list. This will increase the accuracy of your reports and also help you avoid having your emails identified as spam.

Use

Donor acquisition can be difficult and costly, which is why the key to fundraising success is donor retention. The key to retention is leveraging your data to reach supporters with highly-personalized messages that will keep them engaged and help you build relationships over time. The majority of donations come from individuals, and the way individuals interact with and support organizations has changed dramatically in recent years. Traditional methods of direct mail, phone calls and face-to-face meetings and events are giving ground to digital technologies including email, mobile apps and social networks. People expect to be engaged on their terms, so organizations need a continuous, multi-channel strategy and the ability to automate communications when possible. Learn about the features your donor management software provides and put

Want to learn more? Join us May 16-19 for the **mhca** Spring Conference in Cincinnati, Ohio, where we will learn about leadership's role in technology acquisition. See you soon!

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