

Questions to ask when considering a Nonprofit CRM Product versus a Starter Pack + Custom Development

1

Time/Speed

- Are your digital transformation initiatives on target or behind schedule?
- Do you have a legacy system with a specific contract expiration date?
- Do you have challenges with integration and multiple point solutions resulting in delayed execution on fundraising initiatives and campaigns?
- Do you have internal pressure to move quickly to a modern architecture or commercial platform to solve marketing, fundraising, or IT challenges?
- Do you have a mandate to move to the cloud on a true SaaS platform to support remote workers anytime, anywhere, on any device?

2

Cost/Investment

- Do you have flexibility in your budget to accommodate the often vague and risky project estimates for custom software development?
- Would a budget overrun on custom development create a hardship on your financial plan? If so, would the hardship potentially cripple the project?
- Do you have budget set aside for the inevitable future enhancements or changes in specification?
- Are you seeking definitive (fixed) software costs from this initiative over a three to five year period?

3

Current Support Capabilities

- Do you have excess capacity in your staff to review, approve, and test beta products or modules?
- Do you have excess capacity in your staff to gather, document, and confirm functional requirements?
- Do you have excess capacity in your staff to participate in data conversion mapping and testing?
- Do you have excess capacity in your staff to produce useful user guides and product documentation, both technical and user?

- Do you have readily available resources with demonstrated history in this subject matter development and history of on-time, on-budget software engineering?
- Do you have excess capacity in your staff to develop a library of video training to ensure staff are well-trained and that adoption won't suffer/fail?

4

Current Support Capabilities

- Do you have excess capacity to triage, manage, and resolve inevitable support tickets for bugs, questions, and enhancement requests (fully staffed support desk)?
- Do you have an on-line support environment for help, training, community collaboration, knowledge search, and enhancement request voting?
- Do you have on-call engineering resources to resolve mission critical problems, failure, or interruptions?

5

Future Product Roadmap

- Do you have internal resources to test each new release or patch from the platform vendor (Microsoft, Salesforce) for quality and compatibility with the customizations you will be developing?
- Do you have internal capabilities to identify, document, and plan for enhancements and customizations?
- Do you have excess capacity each year to develop, test, document, and support the new enhancements?
- Do you have excess capacity to test 3rd party integrations with your customizations (ClickDimensions, Maplytics)?

6

Flexibility

- Do you have the necessary system support to respond to future system needs of your organization?
- Will you require direct access to the back-end databases or at least a daily copy of the database for direct access?