

# Everything You Need to Know About CRM Systems

*For Nonprofit Organizations*



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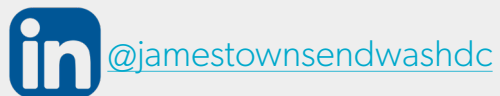
# Presenters



**James Townsend**

VP, Marketing at Sylogist

Founder and President of InfoStrat, which is now a division of Sylogist. Has built nonprofit solutions for over 20 years including grant management and membership.



**Michelle Kocin**

Digital Marketing Manager at Sylogist

Held various positions in event-based fundraising at nonprofits including American Diabetes Association, JDRF, Crohn's & Colitis Foundation, and Muscular Dystrophy Association

# What is CRM ?

## Constituent Relationship Management

The process where an organization administers interactions with constituents, typically using data analysis to study large amounts of data and information.

**A CRM System is a software platform that compiles data from a range of channels:**



Websites



Social Media



Email



Phone Calls



Marketing Campaigns



Live Chat

## **CRM Systems aren't just for commercial organizations.**

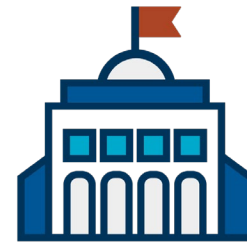
While many people think about commercial operations when they hear “constituent relationship management”, nonprofits and public service organizations can benefit from implementing a CRM system.



*Nonprofits & NGOs*



*Churches & Faith-Based Organizations*



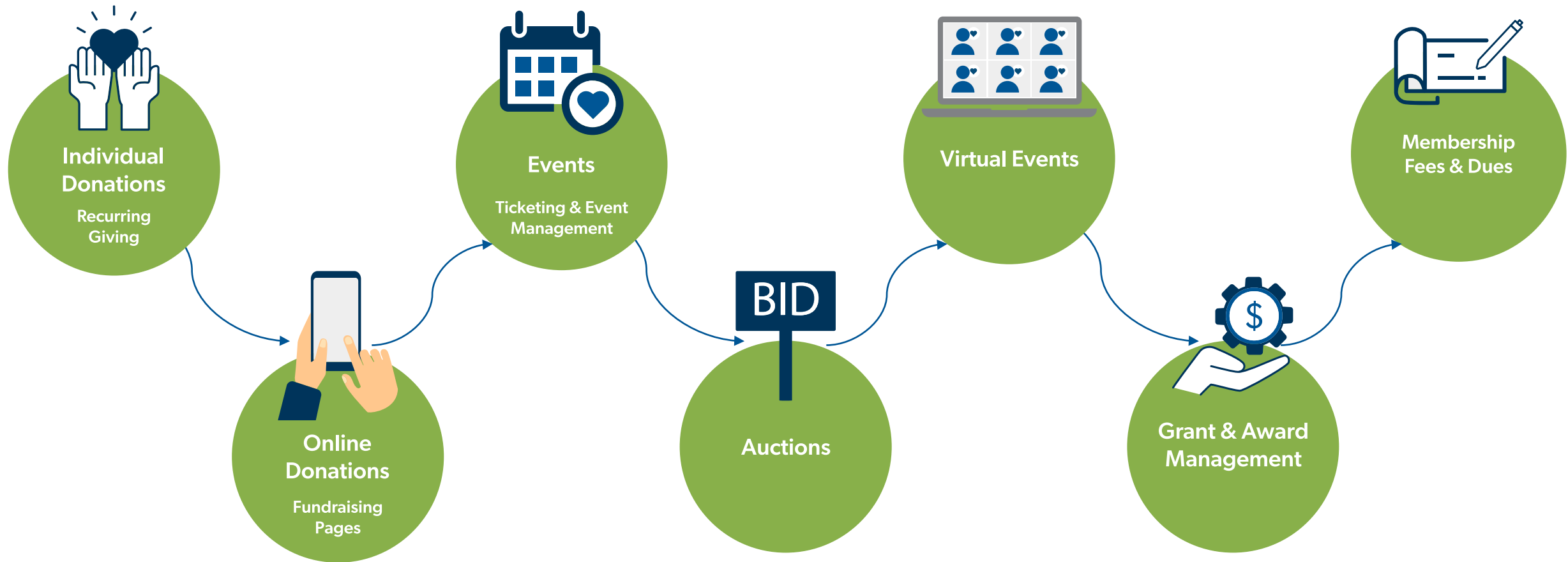
*Government*



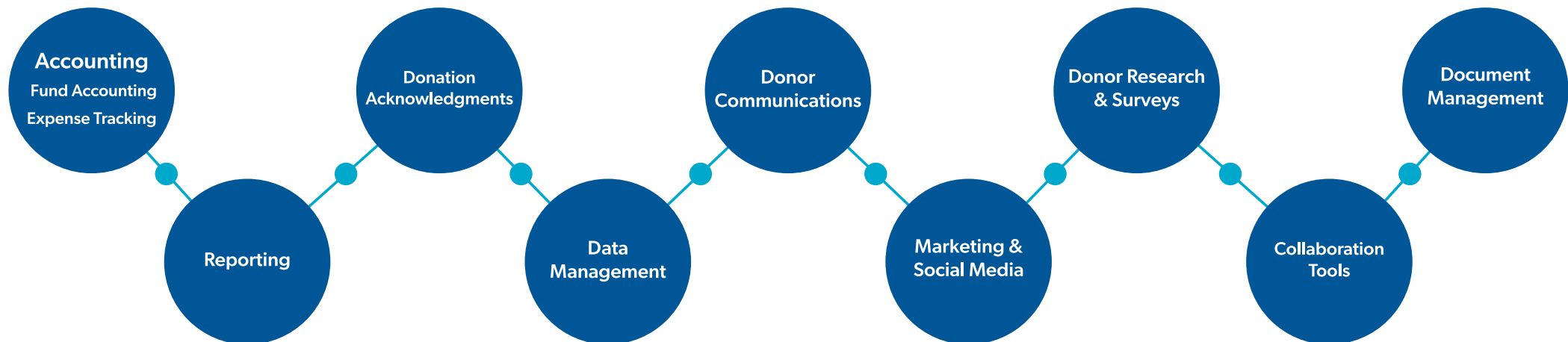
*K-12 School Districts*

# Nonprofits and public service organizations are complex.

Some focus primarily on fundraising to fulfill their mission, with revenue generated through multiple types of giving.

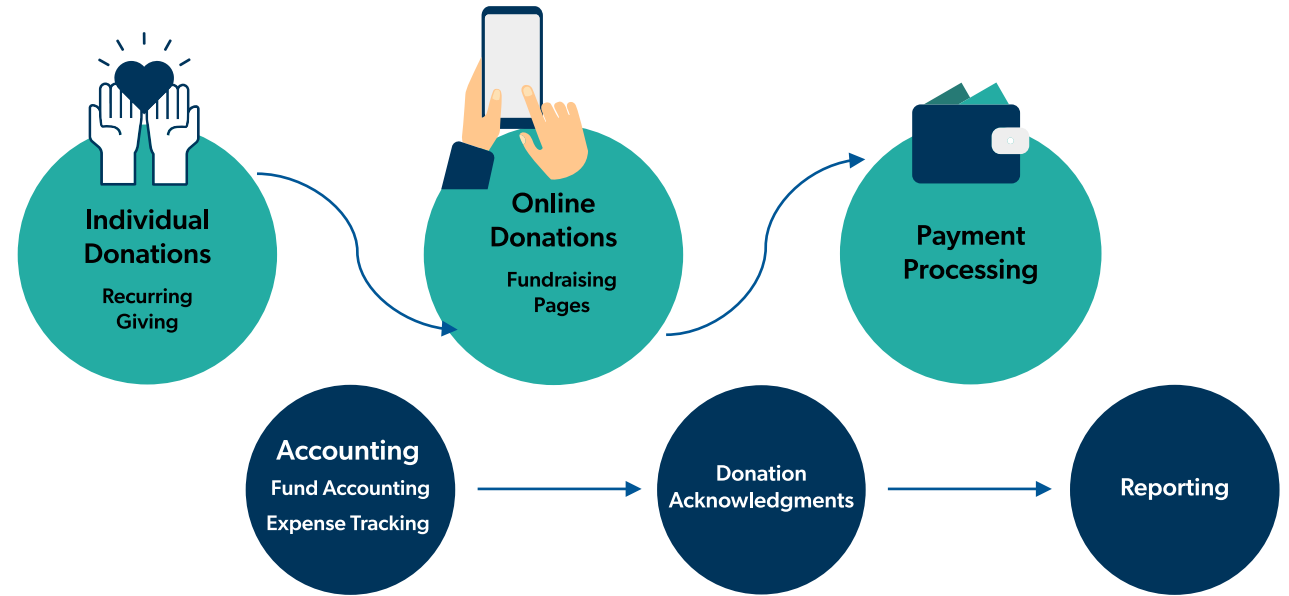


In addition to revenue, these organizations need software to track expenses, generate reports, create and send donation acknowledgments and tax receipts, allocate certain funds to specific activities and more.



**Most organizations find software that addresses fundraising needs. Many of these solutions are focused on events and donations and only meet some of the needs of the organization.**

For example, a solution might allow the organization to track individual donations, online giving and have integrated payments and other tools that address the data related to these types of fundraising.



Then they find additional tools to handle the functions not covered by the first two solutions.

But they still need other software for gala management and to run auctions, so they find a tool to address this need.

Donor Research & Surveys

Marketing & Social Media

Donor Communications

Events  
Ticketing & Event Management

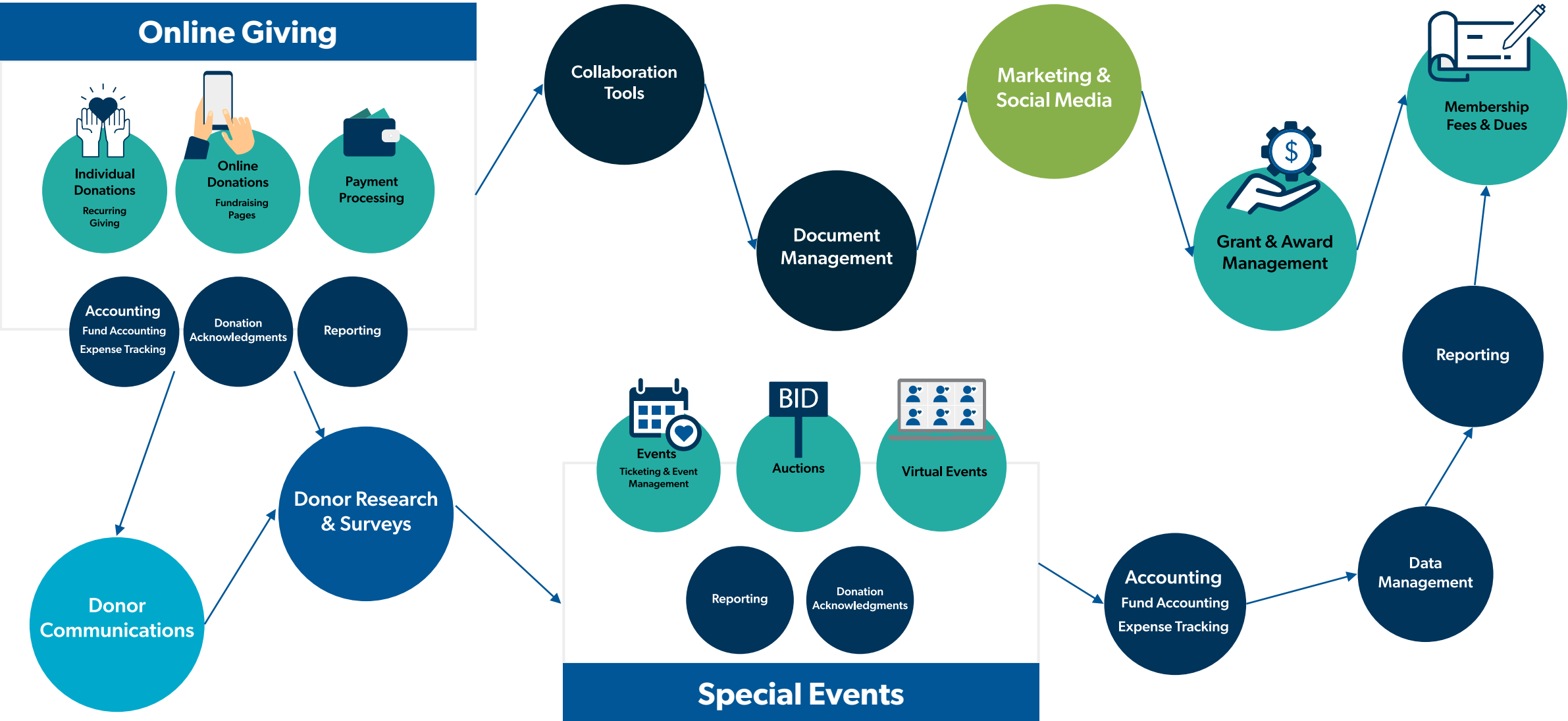
BID  
Auctions

Virtual Events

Reporting

Donation Acknowledgments

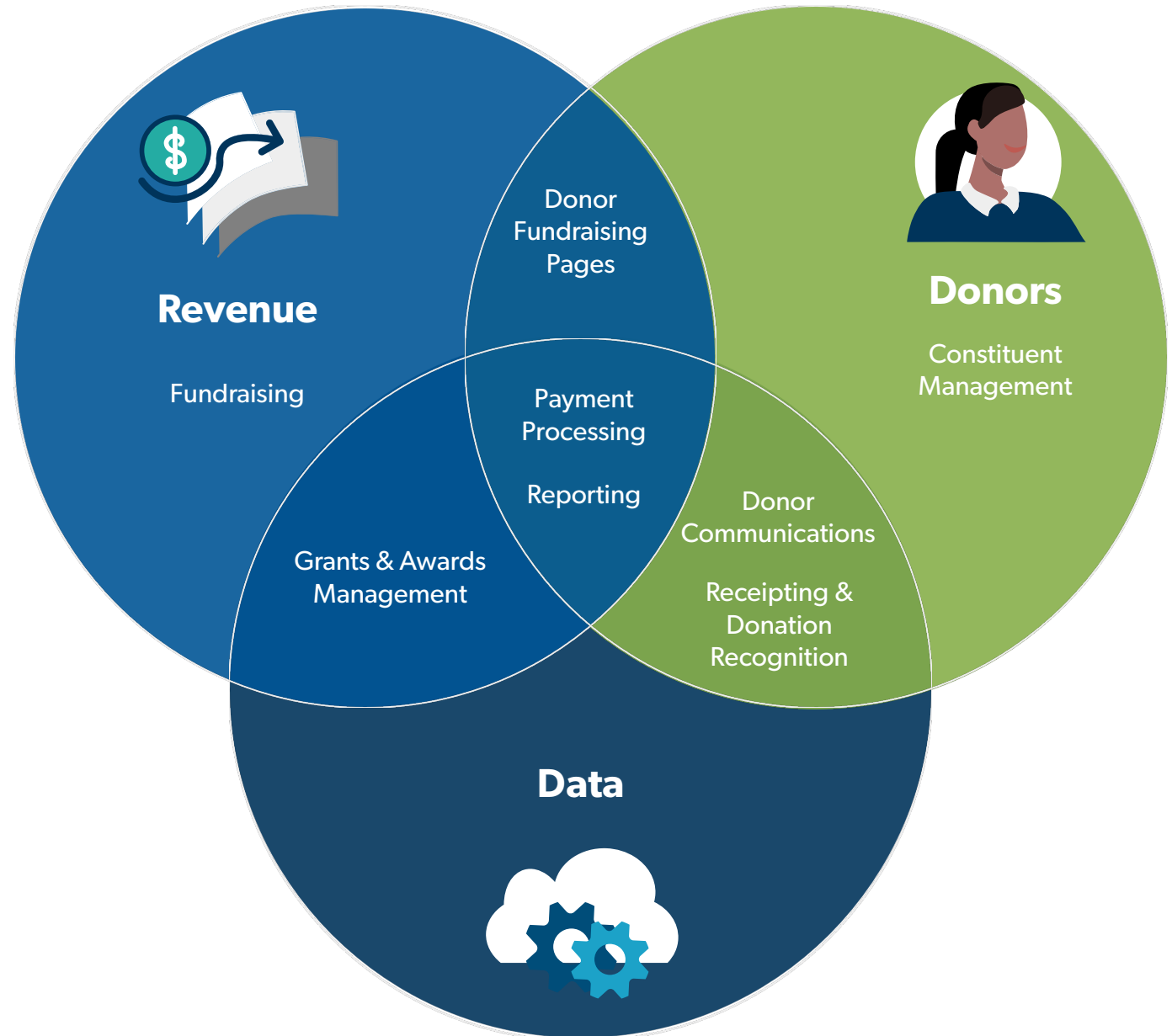
These solutions don't work together, so organizations end up with multiple software platforms and have no options for consolidated reporting, aren't able to collaborate, and end up spending precious time on things that don't directly fulfill their mission.





# Streamline Your Operations

A CRM system can streamline your operations to one system of record, with tools to track revenue and expenses, manage donor relationships, and manage data for both fundraising AND donors.



When looking for the right CRM, there are some key features you'll want to look for.

Depending on your organization's needs, you may also look for features to track membership, manage volunteers, manage program activities, and other specific tasks.



## Build better relationships with donors.

Instead of looking at donors based on individual events or programs, you can view the donor's entire giving history, previous communications, and interactions with the donor.

This transforms your process from a reactive, episodic approach to true relationship building.

### Relationship building helps with:



#### Donor Retention

Keep donors happy and develop a lifetime relationship



#### Donor Cultivation

Collect and analyze data to identify prospects for more involvement and major gifts



#### Donor Stewardship

Say thank you in a timely manner and ensure your donors receive the best customer service from your staff

# Transform all your operations.



360-degree view of donors



Centralized home for constituent data across all events and programs



Data-driven insights to inform decision making



Automate time-consuming tasks



Create a scalable program with the ability to evolve and expand over time

# Ready to empower your mission and implement a CRM solution?



Trusted provider of software solutions for the public sector and nonprofits



An innovative CRM system built on Microsoft Dynamics 365 using the Common Data Model.

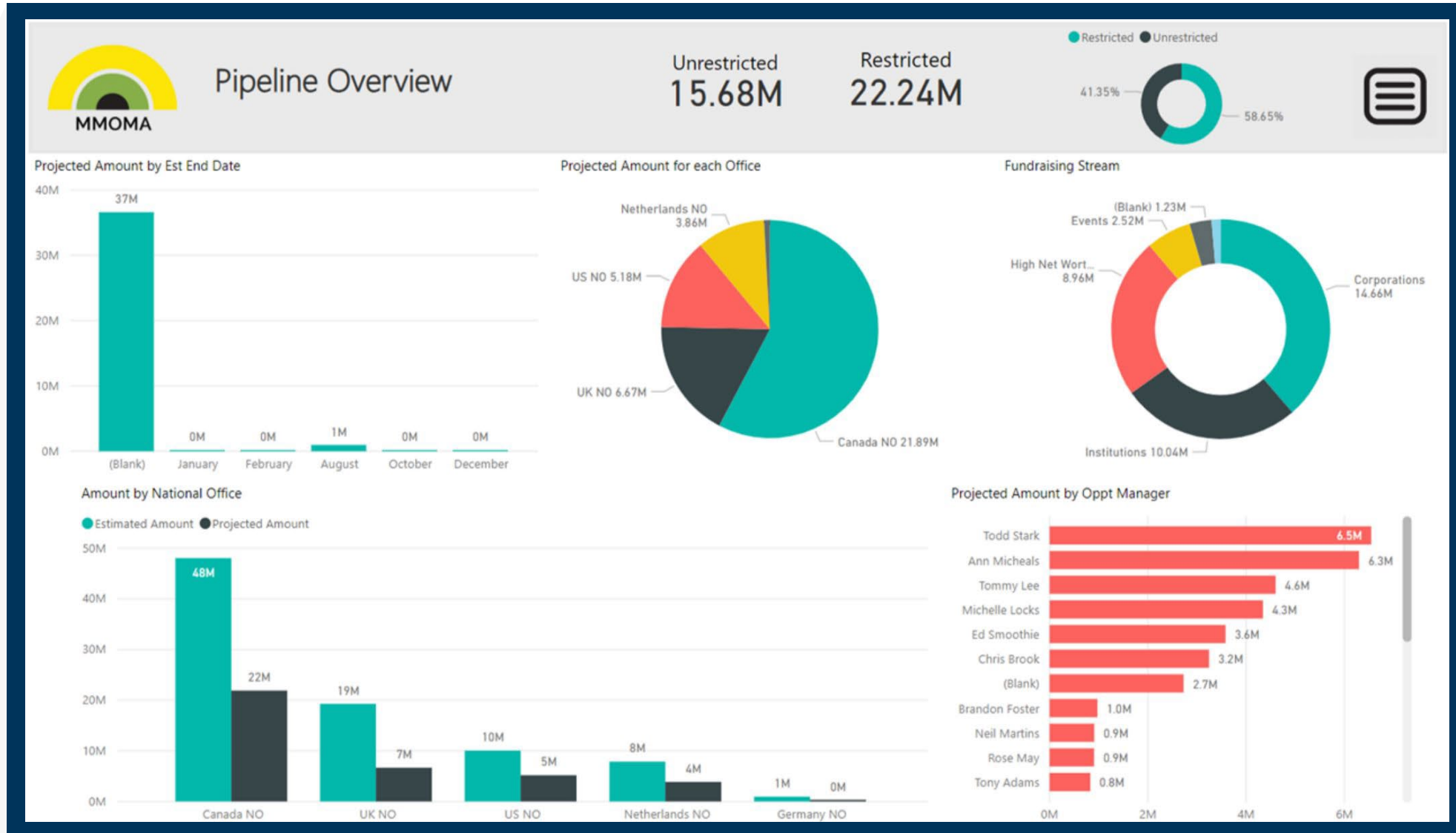


Accounting solution built on Microsoft Dynamics 365 using the Common Data Model.

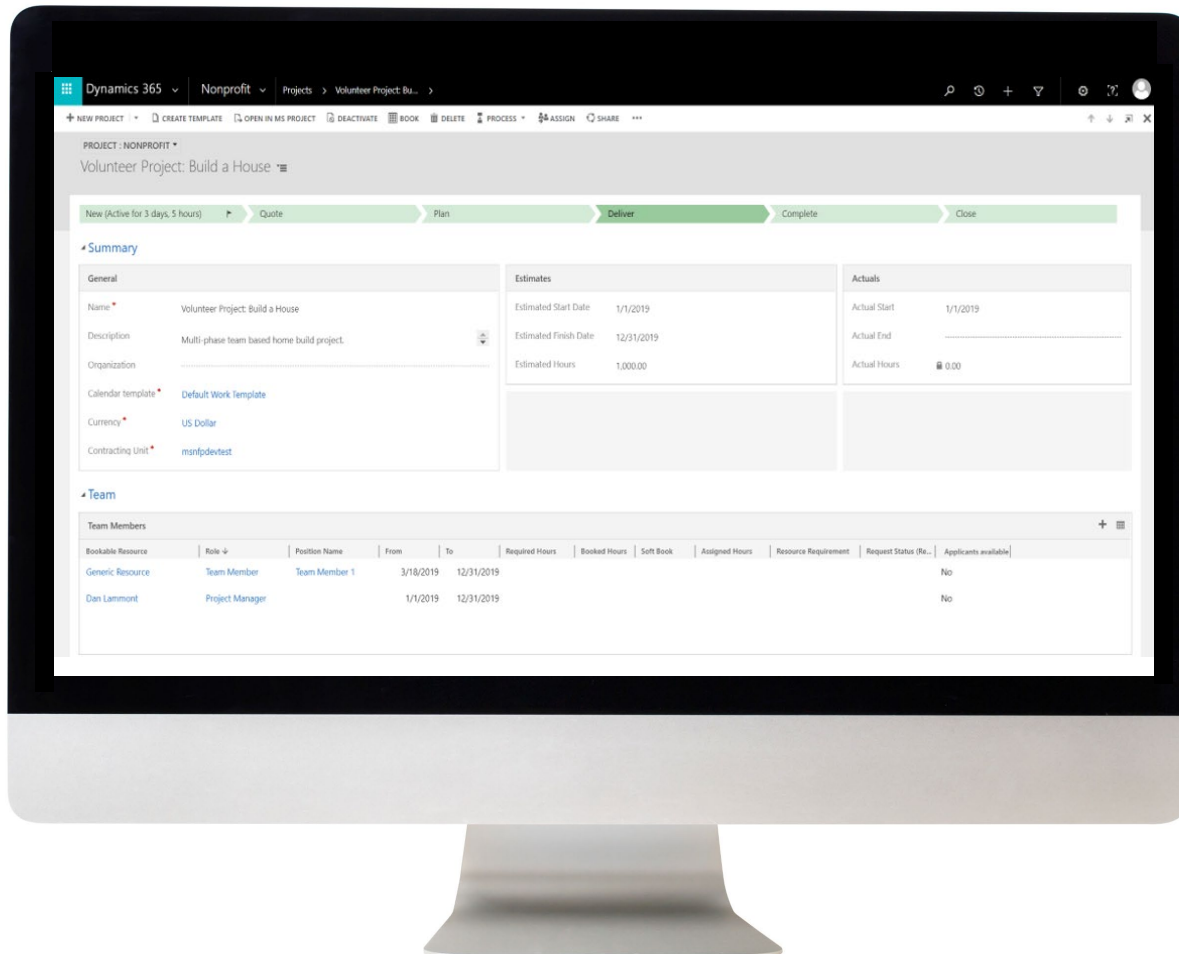
Most CRM vendors offer free trial accounts and some offer free software to qualified nonprofits

<https://www.microsoft.com/en-us/nonprofits/offers-for-nonprofits>

# CRM for Fundraising

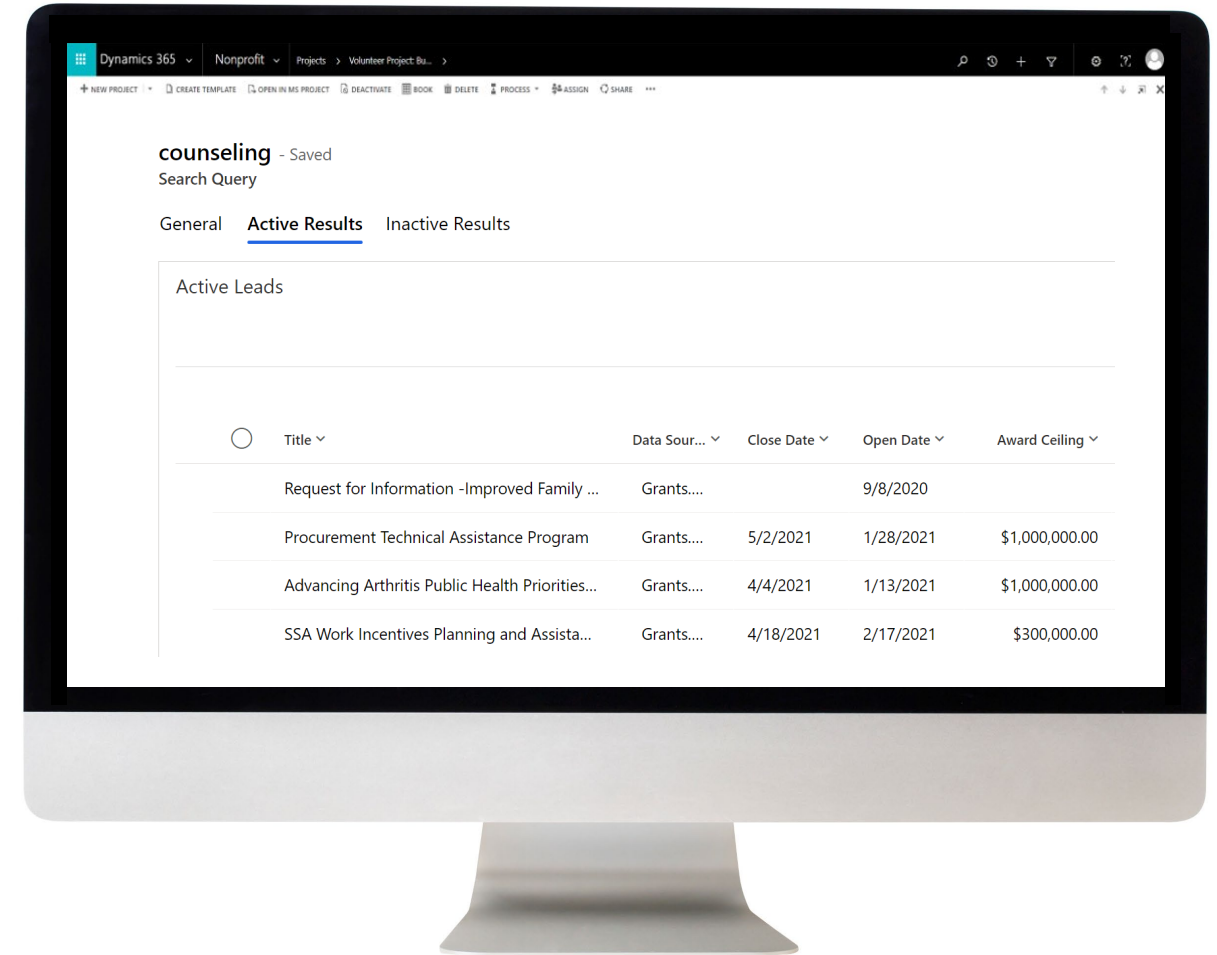


# Microsoft Cloud for Nonprofit – Fundraising and Engagement



- Free solutions
- Constituent management
- Fundraising
- Volunteer management
- Award management
- Program delivery

# Searching for Grants





# Questions?



# Download the Infographic



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For nonprofits and public service organizations

## What is CRM?

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The process where an organization administers interactions with constituents, typically using data analysis to study large amounts of data and information.

### CRM System

A CRM System is a software platform that compiles data from a range of channels:



### CRM Systems aren't just for commercial organizations.

While many people think about commercial operations when they hear "constituent relationship management", nonprofits and public service organizations can benefit from implementing a CRM system.



Nonprofits  
NGOs



K-12 School Districts  
Higher Education



Religious Institutions  
Faith-Based Organizations



Government  
Public Institutions



<https://www.sylogist.com/crm-systems>

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## Sylogist's Blog

<https://www.sylogist.com/blog>

## Blog Post on CRM

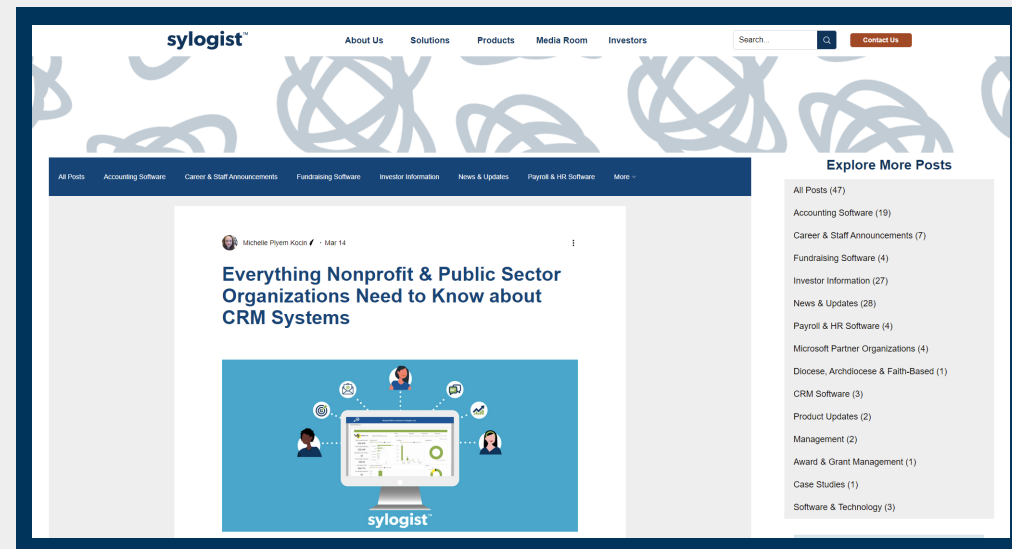
<https://www.sylogist.com/post/crm-system-guide>



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  - A Nonprofit's Essential Guide to Accounting Software (Dec 22, 2021)
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  - The Unfortunate Truth Behind Low Code/No Code Platforms (Jan 8)
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Contact Jim and Michelle at: [marketing@sylogist.com](mailto:marketing@sylogist.com)