A guide to CRM systems

for not-for-profit organisations

July 2016

Version 4.6

Introduction

After what has been a difficult time for the sector with negative headlines, data privacy concerns, a changing fundraising regulatory environment and, more recently, uncertainties around Brexit, the need for the sector to improve the understanding of and communication with supporters, members and the public is more important than ever.

Channels and touchpoints of communication continue to evolve and grow and digital and mobile technology has led to real-time conversations taking place and often very visibly to all. This changing landscape means communication is now being driven by supporters, members, service users and the general public as well as by more traditional approaches.

An additional challenge is how to ensure the most effective conversations are happening at the right place at the right time. The style and approach required to undertake engaging and successful communications differs depending on where people are having those conversations – be it over the telephone, text, email, website, Facebook, Twitter, Instagram, TV, YouTube, at a local public community event or by other means.

To acquire, nurture, develop and retain a relationship requires us to achieve greater understanding of individuals and organisations than ever before. At the same time a more insightful data-informed approach to stewardship would be to ensure the most appropriate and effective style and channel of communication is used.

To help the sector overcome these challenges, suppliers of customer (or contact) relationship management (CRM) systems have continued to develop the software functionality. As well as the more established offerings within the market, some CRM systems are now full 'cloud platforms' whilst others function as an online Content Management System (CMS) but with CRM functionality built in with the ability to offer insights into online activity.

Our aim in producing this guide is to share information about the many choices available, based on our extensive experience and specialist knowledge of the sector. We hope it will be of interest whether you are a membership organisation, a fundraising focussed charity, large or small in income or resources.

Adapta Consulting, July 2016

About this guide

Within this guide we provide details of suppliers and software packages that are capable of meeting many of the key requirements for managing relationships with supporters, members, service users, beneficiaries and other types of contacts in a not-for-profit organisation. This latest version groups these solutions into three areas: Product, Platform and Open Source as a logical approach with which to view and understand the current CRM market.

Product CRM systems are package solutions, often with core functionality relevant to many not-for-profit organisations (such as Gift Aid processing). Options are often switched on or off dependant on requirements of the organisation and/or software licencing options purchased. Additional modules and bespoke development are often available at additional cost.

Platform systems are solutions that are built upwards from a core software platform such as Microsoft Dynamics CRM or Salesforce, often offering only core contact relationship management functionality out-of-the-box. Additional functionality relevant to either the sector as a whole or an individual organisation has to be purchased or developed. Some suppliers have developed additional NFP relevant functionality available to purchase.

Finally, Open Source systems used within the NFP sector are often evolved from Content Management Systems (CMS) and due to open source licencing can be acquired for free. A community of users and developers contribute to patch and develop the core software code base. Apart from free plug-in functionality that is available, a number of suppliers have built paid-for plug-in solutions focussed on the needs of the NFP sector.

Adapta Consulting is familiar with each of the suppliers and systems included in this guide. However, for the avoidance of doubt, the tables are not intended to be comprehensive and are provided for information purposes only. Adapta Consulting makes no representation as to the suitability of any of the companies listed or the accuracy of the information provided.

About Adapta Consulting

At Adapta Consulting, we are independent, we are not resellers and do not receive commission or income from suppliers. We help you meet the challenges of change: processes, people and technology. We work exclusively with not-for-profit organisations, where our consultants bring a combination of deep systems knowledge and wide experience, gained over many years working at senior levels in the sector. We are completely independent and, in all our work, we set the highest professional standards to ensure we provide an objective service, adapted to your needs.

Our services

CRM	Virtual IT Director
Selecting software	Coaching and mentoring
Strategies for IT and web	Improving your processes
Developing a business case	Managing implementations
Managing information security	

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CRM - Products

Package name	Made by	Resold by	Notes on company	Notes on system	Illustrative customers
AdvantageNFP Fundraiser	Redbourn Business Systems	N/A	Redbourn develop and support AdvantageNFP Fundraiser and AdvantageNFP Box Office as well as being IBM midrange experts developing systems in IBM CA 2E.	AdvantageNFP Fundraiser is available in 'Solo', 'Professional' and 'Enterprise' versions. The enterprise version is built on SQL Server and the other versions are on JET.	Birmingham Royal Ballet, World Development Movement, Wymonham College, Bibic, St Clare's Hospice
Affiliate	RedSky IT	N/A	RedSky IT was formed following a series of mergers and acquisitions. Formerly known as Ramesys, RedSky IT has been providing solutions to professional bodies, awarding bodies, universities and public libraries for more than 30 years. The company is now part of the JDM Technology Group which primarily provides software to the construction industry worldwide.	Affiliate is RedSky IT's flagship product for the not-for-profit sector. It is an integrated set of management solutions for membership organisations, awarding bodies, federations, institutes and associations. It comprises a range of application modules supported by a suite of web services and self-service solutions that help organisations improve member retention and recruitment.	Chartered Institute of Personnel and Development (CIPD), Chartered Institute of Public Finance and Accountancy (CIPFA), Institute of Chartered Accountants in Ireland (ICAI), Institute of Sales and Marketing Management (ISMM)
Alms.NET	Westwood Forster	N/A	Westwood Forster have worked with the not-for-profit sector since 1990 and have a well-established client base. As well as Alms.NET, other products are Streetwise Addressing and Streetwise Bank Validation.	Alms.net is a fundraising, membership and grants solution. It allows organisations to adopt Best Practice methods quickly and effectively for each business process.	CBM UK (formerly Christian Blind Mission), UNICEF UK, Mencap
Aptify	Aptify Inc	Pangaea Consulting	Pangaea is a UK reseller of Aptify, based in Gloucester and supports organisations in the not-for-profit and commercial sectors to achieve business improvements in their use of information systems.	Aptify provides a wide variety of business functionality in a single package, and is supplied with a comprehensive set of modules including workflow management and business intelligence tools offering 200 reports out-of-the-box.	Universities & Colleges Information Systems Association, Shelter, Elim Pentecostal Church, British Society of Gastroenterology, Regional Studies Association
BeeFunded	Bee Software	N/A	A small independent software company based near Warwick. This is the only system that they currently market though they do a significant amount of bespoke system development for small charities. Not to be confused with the crowdfunding platform of the same name.	This is a cloud based system that is aimed at small to medium-sized charities. They can also provide bespoke versions of the system for organisations with special requirements.	Arts Insight Find a Better Way
Blackbaud CRM	Blackbaud	N/A	For the past 30 years, Blackbaud have been developing software and services for not-for-profits. Customer base of 27,000+.	Aimed at larger not for profit organisations, Blackbaud CRM is a flexible, scalable and secure CRM solution based on Blackbaud's proprietary 'Infinity' platform.	Breast Cancer Care, British Heart Foundation, Oxford University, Greenpeace International, BirdLife International, Jewish Child's Day, Children's Hospice South West, Highland Hospice
Care NG	OneAdvanced	N/A	Advanced is a Sunday Times Top Track 250 Company 2015 and was ranked in the Deloitte UK Fast 50 which recognises the 50 fastest growing technology companies in the UK and a winner of the Tech Company of the Year in PwC's UK Tech Awards in 2014.	CareNG is for medium to large charities and educational establishments. Used by many top charities, CareNG charity database software is one of the leading CRM solutions to underpin fundraising, operations and services for medium to large charities.	Amnesty International UK, British Lung Foundation, National Childbirth Trust, The Blue Cross, Save the Children UK, Royal British Legion, RSPB, Diabetes UK, Marie Curie Cancer Care, Guide Dogs for the Blind, CIPD, Federation of Small Business, Scout Association, RoSPA, Bar Council, Médecins Sans Frontières UK, WWF-UK, Woodland Trust
Donations Co-ordinator	Data Developments	N/A	A small company based in Wolverhampton that was established in 1985. They produce a range of products aimed at churches and small charities/community groups.	Donations Co-ordinator integrates with Finance Co-ordinator and Membership Co-ordinator. Together these products are designed to cover all the admin systems needs of a church or small charity. The basic products are available in single user versions and can be upgraded to multi-user.	Over 5,000 churches and small charities use their products.

Package name	Made by	Resold by	Notes on company	Notes on system	Illustrative customers
Donorflex	Care Data Systems	N/A	Donorflex was formed in 1988 and grew from an initiative of Acorns Hospice, it became an independent company in 1991 and still has a strong presence in the hospice sector.	In 2013 and 2015 Donorflex was voted Best Database Supplier in the Institute of Fundraising's Partners in Fundraising Awards.	St Luke's Hospice, Make-a-wish Foundation, Princess Alice Hospice, St Michael's Hospice, Lincs and Notts Air Ambulance Trust, Break, Emmaus UK, Railway Children, Toybox Charity, JDRF
Donorfy	Donorfy	N/A	Donorfy launched in 2015 to provide a completely new fundraising CRM solution to the charity sector. Robin Fisk and Ben Brett set up the company, having previously been involved in the development of ProgressCRM. The company is still small and partner organisations carry out the implementations. Donorfy has approximately 60 customers as at September 2016.	Donorfy came top in the 2016 Civil Society Media, Charity CRM Survey. It is a cloud-based product (using Microsoft Azure and delivered via a web browser) and is priced by the number of constituents (unlimited users). All implementations (and subsequent support) are handled by partners such as MAST-ICT (www.mast-ict.com)	CARE, Read Foundation, Bowel Cancer Research, Delete Blood Cancer, The Big Give, Heart of England Forest, West Dean College, St. Martin-in-the-fields Christmas Appeal, The Hunger Project UK, Football Beyond Borders.
Donor Perfect	SofterWare Inc	DMACS	SofterWare is a US company that was founded over 25 years ago and their product has been localised for the UK and is supported by DMACS (founded in 2008) a small company based in Ledbury that specialises in consultancy and outsourced support for small charities.	DonorPerfect offers a wide range of standard fundraising functionality. It prides itself on ease of use, online donation and payment forms, powerful reporting and multi-currency reports. They offer a browser based version and it integrates with Quick Books.	Institute of Public Relations, Friends General Conference, Central Asia Institute, AISH
Donor Strategy	Advanced Business Solutions	N/A	Advanced is a Sunday Times Top Track 250 Company 2015 and was ranked in the Deloitte UK Fast 50 which recognises the 50 fastest growing technology companies in the UK and a winner of the Tech Company of the Year in PwC's UK Tech Awards in 2014.	Donor Strategy is for small to medium-sized charities and education. Over 300 organisations use Donor Strategy.	Winston's Wish, George Müller Foundation (Müllers), Julia's House
eMANGO Membership Platform	eMANGO Ltd	N/A	eMANGO is a small web-development company based in Bournemouth that has created its own propriety browser based membership software, with modules that are adapted to meet the needs of individual customers.	e-Mango provides an integrated solution that gives an organisation control of both their website and their membership database in one dynamic system. It is widely used by parish and local councils.	Association of Professional Staffing Companies, British Coatings Federation, British Plastics Federation, Fine Art Trade Guild, Three Shires Hospital, Society of Garden Designers
eTapestry	Blackbaud	N/A	For the past 30 years, Blackbaud have been developing software and services for not-for-profits. Customer base of 27,000+.	eTapestry is a cloud-based, affordable and robust fundraising solution for not-for-profits. It is an easy to use and inexpensive database allowing access to donors, members, supporters, and volunteers.	Ark Cancer Care, Northwood African Education Foundation, Kilbryde Hospice, Ripple Africa, Scottish Epilepsy Initiative, Solace Women's Aid, VisionFund International
Harlequin	Harlequin Software	N/A	Established in 1986, Harlequin supports 200 not-for-profit organisations across the UK. With a 99% client retention rate, Harlequin works with healthcare and welfare organisations, faith charities, education establishments and membership associations. In 2014 Harlequin was voted Best Database Supplier in the Institute of Fundraising's Partners in Fundraising Awards.	The Harlequin CRM database was the most recommended system in Charity CRM Software Survey 2014, 2013, 2012 and 2011. The software can be used across an entire charity or within one department, such as fundraising or service delivery. Harlequin CRM integrates with Harlequin's Charitable Accounting system.	Addenbrooke's Charitable Trust, Alder Hey Children's Charity, Buglife, Forces Pension Society, Lichfield Cathedral, National Museum of the Royal Navy, Nightingale House Hospice, The Poppy Factory, Ronald McDonald House Charities

Package name	Made by	Resold by	Notes on company	Notes on system	Illustrative customers
iMIS 20	Advanced Solutions International (ASI)	N/A (ASI Europe)	Advanced Solutions International have worked with not-for-profit sector since 1991.	iMIS 20 is an Engagement Management System (EMS)™ that enables organisations to engage members, donors, and other constituents – including staff – anytime, anywhere, on any device. It includes constituent relationship management, commerce management, member self-service, online fundraising, social engagement, private communities, and mobile access in one seamless cloud-based system. Members, donors, and other constituents – as well as staff – can access the system from a web browser. Plus, iMIS 20 has the flexibility to work with an existing Content Management System (CMS) or – for many organisations – the power to manage the entire website. iMIS 20 is available for organisations of all types and sizes. • iMIS 20-100: Out-of-the-box EMS for small-staff organisations. Available exclusively via the iMIS Cloud. • iMIS 20-200: Out-of-the-box EMS plus additional functionality and standard tailoring capabilities. Available exclusively via the iMIS Cloud. • iMIS 20-300: Enterprise-level EMS with advanced functionality, extensive tailoring capabilities, and optional third-party applications authorised by ASI. Available via the iMIS Cloud or on premise installation. However, there may be limitations on third-party applications available in the iMIS Cloud.	Rethink Mental Illness, Royal College of Emergency Medicine, National Kidney Foundation, American Postal Workers Union, British Association of Snowsport Instructors, Chartered Institution of Water and Environmental Management, Chartered Quality Institute, IMCA Trading Ltd, Institute of Information Security Professionals, International Underwriting Association of London, Lloyd's Market Association, Multilaw - Multinational Association of International Law Firms, NDNA - National Day Nurseries Association, Royal College of Veterinary Surgeons, Royal Society of Chemistry, The Law Society of Scotland, West & North Yorkshire Chamber of Commerce
iMIS 20	Advanced Solutions International (ASI)	iFinity	iFinity emerged from Fisher Technology, which first started to implement iMIS in 1994. They support over 100 not for profit organisations in the UK.	iMIS offers not for profit organisations contact relationship management (CRM), fundraising, web, and e-marketing capabilities in one upgradeable, web-based solution	Electrical Contractors' Association, Civil Aviation Authority International, British Transplantation Society, British Academy of Management, Royal Statistical Society
KISS Contacts	KISSoftware	N/A	A small company based in Swindon. They have just the one product which has been on the market since 1990 and is a straightforward and relatively low cost CRM for small voluntary organisations.	KISS Contacts is a system that makes it easy to manage contacts, members and donors for societies, clubs, and associations.	Birmingham National Trust, British Florist Association, Book Trade Benevolent Society, City YMCA London, Disabled Living, Kids in Sport, British Dental Health Foundation, War on Want NI
Luminate Online	Blackbaud (having acquired Convio in 2012)	N/A	For the past 30 years, Blackbaud have been developing software and services for not-for-profits. Customer base of 27,000+.	Luminate CRM is a cloud-based CRM system that offers large, enterprise not-for-profits an open, extensible solution that allows them to fully engage with individuals online and offline as well as analyse the relationships they have with donors, volunteers, advocates and other constituents to design tailored, integrated, multi-channel campaigns and interactions that are most beneficial to both the organisation and the individual.	TransForm; Food Bank For New York City; Project On Government Oversight; Meals On Wheels & More; Side by Side Kids; United Way of Lake County; Cross International; Catholic Charities of the Archdiocese of Miami; The Heritage Foundation; Human Rights Campaign; Civil War Trust; Wildlife Conservation Society; American Nurses Association; RESOLVE; Daily Bread Food Bank
Member Strategy	Advanced Computer Software Group	N/A	Advanced is a Sunday Times Top Track 250 Company 2015 and was ranked in the Deloitte UK Fast 50 which recognises the 50 fastest growing technology companies in the UK and a winner of the Tech Company of the Year in PwC's UK Tech Awards in 2014.	Member Strategy is aimed at small to medium sized membership organisations. It is available in a hosted environment and can be linked directly to Exchequer finance and accounting software.	Not specified but Advanced NFP claim to have over 1000 NFP organisations as customers of its products.

Package name	Made by	Resold by	Notes on company	Notes on system	Illustrative customers
MerlinCRM (previously called SodalitaS)	MTL Software Solutions Ltd	N/A	Miller Technology Ltd (MTL) has supplied membership and contact management (CRM) systems to the not for profit for approximately 30 years.	Merlin provides a fully integrated web enabled membership solution to meet the most complex demands faced by trade unions, associations, professional bodies and charities. Merlin is built on MTL's SodalitaS CRM which is a widely used membership system in trade unions and other not-for-profit bodies in the UK and Republic of Ireland.	Rail Maritime and Transport Union; Royal College of Nursing; London Cycling Campaign; European Social Network; Institution of Environmental Services; Royal College of Speech and Language Therapists; Royal College of Midwives; UNISON; General Chiropractic Council; IBOA the Finance Union; Irish National Teachers Association; General Teaching Council for Scotland; General Teaching Council for Wales; Association of Teachers and Lecturers; BECTU; Community; Fire Brigades Union; NASUWT; PCS; Royal College of Physicians; TSSA
NetSuite	NetSuite	N/A	NetSuite is the world's leading provider of cloud-based business management software. Through NetSuite.org they run a donation programme, ensuring charities get significant discounts.	NetSuite is primarily known as a finance system in the UK as the CRM had not previously been localised for the UK market. This is now being developed with help from NetSuite's partner RSM so they are able to offer a fully integrated cloud-based finance and CRM solution for UK charities.	AbilityNet, YouGov, Foundation Center, Found My Animal, Good360, Bonneville Environmental Foundation
OM.Net	3Si	N/A	3Si was established with an ambition to serve the membership management needs of the UK's not-for-profit organisations.	OM.Net is a versatile membership management system. OM.Net is developed and owned by 3Si and is used by over 40 organisations throughout the UK to manage their CRM, marketing, events, training and membership.	Engineering Construction Industry Association, Mensa, Netball England, BPIF, IHEEM, NFU Scotland
oomi	Centrepoint Computer Services	N/A	Oomi is part of Centrepoint, a company that has been supplying membership and fundraising software to NFP organisations for over 22 years.	Oomi is a fully integrated engagement management system for the NFP sector – combining CRM, website, collaboration, engagement and social media.	The Anglo-Omani Society, The Design & Technology Association, Energy UK, Energy Institute, Transaid
OpenEngage (formerly called Integra)	Advanced Computer Software Group	N/A	Advanced is a Sunday Times Top Track 250 Company 2015 and was ranked in the Deloitte UK Fast 50 which recognises the 50 fastest growing technology companies in the UK and a winner of the Tech Company of the Year in PwC's UK Tech Awards in 2014.	OpenEngage is for medium to large membership organisations. Advanced claim that it is the most widely-used membership system in the UK. OpenEngage is used by over 140 membership organisations, institutions and associations.	Numerous Royal Colleges, Trade Associations and Chartered Institutes; Institute of Directors, Institution of Structural Engineers, Royal Institute of British Architects, NHS Confederation, Retail Motor Industry Federation, World Federation of Advertisers, Council of Mortgage Lenders, Fire Industry Association, National Pharmacy Association, Royal Society of Medicine; Energy Industries Council; British Retail Consortium, Royal College of Pathologists, Royal College of Radiologists, National Association of Head Teachers, Girlguiding, General Optical Council, British Veterinary Association, British Dietetic Association, Higher Education Academy, Association of School and College Leaders, British Bankers' Association, The Chartered Institution of Building Services Engineers, Ramblers, Chartered Institute of Public Relations, Institute for the Management of Information Systems, Institute of Environmental Management and Assessment, Chartered Institute of Plumbing and Heating Engineering, EEF: The manufacturers' organisation, Confederation of British Industry
Pro-8	ProTech Ltd	N/A	ProTech has been an independent specialist partner to the not-for-profit and education sectors for more than 20 years and has built up expertise and an impressive installed base of clients.	Pro-8 is a CRM solution designed specifically to manage all of the business functions undertaken by membership organisations through one central knowledge base. This is a cloud-based system built on Microsoft.NET. Also available is ProWeb content management system.	Chartered Management Institute, Institute of Physics, ICAEW (Institute of Chartered Accountants in England and Wales), British Institute of Innkeeping, Chartered Institute of Marketing, Salvation Army

Package name	Made by	Resold by	Notes on company	Notes on system	Illustrative customers
ProgressCRM	ASI Europe	N/A	ASI Europe are the largest, privately-owned global provider of web-based software for member and donor-based non-profits and has served nearly 3,000 customers and millions of users worldwide since 1991. The company has approximately 100 partners and 200 employees worldwide (acquired Fisk Brett in 2008).	ProgressCRM offers mid-sized organisations a packaged and upgradeable fundraising solution. It is still being supported by ASI but not actively marketed.	Action for Blind People, Sightsavers International, Lincolnshire Wildlife Trust, Evangelical Alliance, The Children's Trust, Dreams Come True Charity
The Raiser's Edge	Blackbaud	N/A	For the past 30 years, Blackbaud have been developing software and services for not-for-profits. Customer base of 27,000+.	The Raiser's Edge is a well-established, flexible, scalable and secure Customer Relationship Management (CRM) and fundraising solution.	Over 1,000 customers in the UK including Multiple Sclerosis Society, Crisis, Prostate Cancer Charity, Tommy's, Action for Children, Royal College of Music, English National Opera, University of Glasgow, Children's Country Holidays Fund, National Museums Liverpool, Handel House Museum
Stratum Black	APT Solutions Ltd	N/A	APT Solutions was founded in 1998. APT is a specialist supplier of software and services to the not for profit sector, and has offices in the UK and Australia.	Stratum is a modular system with web 2.0 capabilities ('Stratum Engage'), which integrates traditionally separate, back-end data with website usability to create a comprehensive personalised web experience for both organisations and their members. Stratum's online presence allows members access to a secure home page which will allow them to view and amend their own personal data, pay subscriptions, buy merchandise and personalise their page by adding widgets and RSS news feeds.	Institution of Mechanical Engineers (IMechE), New South Wales Teachers Federation, British Psychological Society, Open University, Campaign for Real Ale (CAMRA), UK Scout Association, Society of Authors, Olympus Camera Club
thankQ	Access Group	N/A	Access Group acquired thankQ in 2013. The company provides a range of software solutions including the Dimensions finance package for the not-for-profit sector. Prior to the acquisition, thankQ had nearly 40 members of staff. They have provided software solutions to the not-for-profit sector for over fifteen years.	thankQ is a CRM software with configurable modules, specially designed for not for profit organisations.	Comic Relief; Royal College of Veterinary Surgeons Trust; Musician's Benevolent Fund; Charity Finance Group; Cera; The Foundation Friends of the Royal Botanic Gardens, Kew; Karuna Trust; Sanctuary Carr-Gomm; Cera; Animal Care Trust; Urban Saints; Keele University; Bakers Food and Allied Workers Union; Concern Worldwide; North Devon Hospice; University of Edinburgh, Rainbows Children's Hospice; Jewish Care, The Iona Community

CRM Platforms - Microsoft Dynamics CRM solutions

System	Provided by	Resold by	Notes on company	Notes on system	Illustrative customers
Microsoft Dynamics CRM	Microsoft	Ciber UK	Ciber is an international systems integration company supplying solutions to customers in three core sectors – not-for-profit, financial services and local government.	Dynamics CRM is a platform developed by Microsoft. Out of the box, the product focuses mainly on sales, marketing, and service (help desk) sectors.	Customers include Age UK, Help for Heroes, RNLI and WaterAid
Microsoft Dynamics CRM (with proprietary templates)	Microsoft	Core	Core is one of the leading MS Gold partner consultancies with specialisms in insurance government and membership. Core acquired Excitation in 2014. Excitation was founded in 2000. They have worked exclusively with Microsoft Dynamics CRM since its introduction in the UK in 2004. They have worked on numerous successful Microsoft CRM projects for organisations of all sizes, ranging from SME's to large banks.	Dynamics CRM is a platform developed by Microsoft. Core has developed add-ons and templates aimed specifically at not-for-profit organisations.	International Transport Workers' Federation, RICS Royal Institute Chartered Surveyors, London First, Association of British Pharmaceutical Association, Fresh Tracks, Interaction Learning & Development, Skiweb, TNT, Northgate, Central YMCA, PJ Valves, Telephonetics, Park Royal Partnership, Quest Colleges
Microsoft Dynamics CRM	Microsoft	Gap Consulting	Gap Consulting was launched in 1999 as a Siebel Consulting partner. The company reshaped in 2006 into a Microsoft Dynamics CRM practice.	Dynamics CRM is a platform developed by Microsoft. Gap Consulting has developed add-ons, such as for event management.	Over 100 Microsoft Dynamics CRM customers covering various sectors; not-for-profit customers include Shelter, The Outward Bound Trust, Princes Youth Scottish Business Trust and Papworth Trust
Microsoft Dynamics CRM (with proprietary templates)	Microsoft	m-hance Ltd	m-hance is a UK based company providing innovative software solutions to 2,000 mid-marked sized organisations. m-hance's core solutions offering consists of financial management, CRM, managed services and software development in a variety of vertical markets including not-for-profit and professional services. m-hance was formed in 2011 following the acquisitions of Calyx Software, Gyrosoft, Trinity Computer Services and elements of MentecPlus, Touchstone Group, Sys-Care and Avant-Garde.	Dynamics CRM is a platform developed by Microsoft. m-hance has developed add-ons and templates aimed specifically at not-for-profit organisations, including support for fundraising activities.	Over 150 implementations for business management solutions in the not-for-profit sector. Clients include Age Action Ireland, the Society of St Vincent de Paul Ireland, Central YMCA
Microsoft Dynamics CRM	Microsoft	Perfect Image	A Newcastle based full service IT provider, delivering tailored solutions and services to a range of sectors. It specialises in Microsoft Dynamics and SharePoint and was established in 1991.	Dynamics CRM is a platform developed by Microsoft. Out of the box, the product focuses mainly on sales, marketing, and service (help desk) sectors.	North East Chamber of Commerce, Mental Health Matters, NCFE, Dementia Care, UK Commission for Employment and Skills
Microsoft Dynamics CRM	Microsoft	Preact	Founded in 1993, Preact is a leading CRM company, specialising in Microsoft Dynamics CRM and Act! They are based in Berkshire.	See above	Mencap, Livability, AgeUK Islington, Hearing Dogs for Deaf People, National Energy Foundation, Sense, Children's Food Trust, Ben – The automotive industry charity

System	Provided by	Resold by	Notes on company	Notes on system	Illustrative customers
Microsoft Dynamics CRM	Microsoft	Pythagoras Communications Ltd	Pythagoras Communications has been implementing CRM, Accounts/ERP and Business Intelligence software solutions to more than 650 organisations worldwide for more than 10 years.	Dynamics CRM is a platform package developed by Microsoft. Out of the box, the product focuses mainly on sales, marketing, and service (help desk) sectors.	Roffey Park, Comic Relief, Institute of Environmental Management and Assessment, Community Integrated Care, Crisis, City University London, National Offender Management Service Disability Law Service
Microsoft Dynamics CRM (with proprietary templates)	Microsoft	Silverbear	Silverbear Ltd is a software solutions company, set up in 2000 and now focused on the not-for-profit sector.	Silverbear has developed an online membership software solution built on Dynamics CRM. In 2014 Microsoft recognised the membership solution as being the only Dynamics CRM-based membership solution to meet the standards required to achieve the Certified for Microsoft CRM award.	British Veterinary Association, Royal Academy of Dance, The Law Society, British Retail Consortium, London & Partners, Energy Industries Council, Royal College of Nursing, BMA, NAHT, Royal Botanical Gardens (Kew), V&A, Natural History Museum
Microsoft Dynamics CRM (sold as 'SmartImpact')	Microsoft	SmartImpact	Founded in 1997, SmartImpact specialises in Customer and Membership management tools for Trade and Professional Associations, Commercial Membership and Not-for-Profit organisations.	Dynamics CRM is a platform developed by Microsoft. SmartMembership adds a layer of modules to provide a broad range of functionality aimed at membership organisations.	Renewable UK, Nautilus International, Fire Industry Association, Energy Saving Trust
Microsoft Dynamics CRM	Microsoft	Touchstone	Touchstone was incorporated in 1982, they supply integrated business software and business consultancy services to mid-sized UK organisations. Touchstone Group has more than 650 active customers and employs over 130 staff. Touchstone have been deploying Microsoft Dynamics CRM for UK organisations since 2003 and have implemented over 130 projects over 7 years.	See above	Royal London Society for the Blind, Bankhall, London Borough of Merton, The Houses of Parliament, London Borough of Lewisham
Microsoft Dynamics CRM (with proprietary templates) ('Tribe')	Microsoft	TSG	TSG is a well-established provider of membership software to smaller organisations.	Launched in spring 2014, TSG Tribe replaces TSG's popular 'Enterprise MRM' software which is no longer actively marketed. Tribe is a Microsoft CRM based product. Existing Enterprise MRM customers will gradually be encouraged to upgrade to Tribe.	Royal College of Ophthalmologists, Institute of Psychoanalysis, Institute of Translation and Interpreting

CRM Platforms - Salesforce solutions

System	Provided by	Resold by	Notes on company	Notes on system	Illustrative customers
Salesforce	Salesforce.com	BrightGen	Founded in 2006. Brightgen focuses solely on Salesforce as its cloud platform. Claims to have a 100% track record of successful projects. Offers a "service management" proposition, based around continuous improvement – works with clients to develop their roadmap and continually develop/improve the product. Rating of 9.4 (out of 10) for customer satisfaction on the Salesforce AppExchange. Has two Salesforce certified architects within their staff.	Salesforce.com claims that Salesforce is the world's number one CRM system with nearly 90,000 organisations using it globally, with a $1.7 billion company behind it. It is a web-based platform which is supported by an "ecosystem" of apps. Smaller charities are often eligible for a number of free Salesforce licences, obtained via the Salesforce Foundation.	British Standards Institute, Barnardos, RSPCA, Guardian News Media; Shell, Lloyd's Register, Icap, Schroders, Vue Cinemas, Scottish Power
Salesforce	Salesforce.com	CloudSymphony	Cloud Symphony are headquartered in Maidenhead in Berkshire. They formed approximately three years ago, and serve the charity and NFP sector, along with the education and public sectors.	See above	Battersea Dogs & Cats Home, Chief Fire Officers Association, Notgoingtouni.co.uk
Salesforce (with MemberNation or DonorNation)	Salesforce.com	Fonteva	Fonteva is well-established in the USA as a Salesforce partner for associations, professional societies, and charities. It has recently entered the UK market.	Fonteva has built MemberNation and DonorNation on Salesforce for use by associations and charities respectively.	BCACC (British Columbia Association of Clinical Counsellors), Mental Health Association in Tulsa, NASBA, National Head Start Association, NICSA, Watermark
Salesforce	Salesforce.com	GiveClarity	A team of experienced, senior charity leaders and Salesforce experts. They provide Salesforce consultancy services to medium to large charities and social enterprises in the UK and internationally. Focusing on one sector (Nonprofit) and leading with one vertical (fundraising) distinguishes them from other Salesforce partners.	Salesforce.com claims that Salesforce is the world's number one CRM system with nearly 90,000 organisations using it globally, with a $1.7 billion company behind it. It is a web-based platform which is supported by an "ecosystem" of apps. Smaller charities are often eligible for a number of free Salesforce licences, obtained via the Salesforce Foundation.	Adoption UK, Christian Blind Mission, Compassion in World Farming, EveryChild, Fairtrade Foundation, Greenpeace International, Meningitis Trust
Salesforce	Salesforce.com	Hyphen8	Clients include Not-for-Profit organisations, including charities, membership organisations, and public sector functions. Hyphen8 is on the UK Government G-Cloud.	See above	
Salesforce (with MemberNation or DonorNation)	Salesforce.com	Purple Vision	A niche UK-based firm that specialises in providing solutions for the not-for-profit sector (mostly charities). They are UK partners for a 3rd party app called MemberNation, which is developed by a US company called Fonteva. MemberNation is claimed to be one of the most developed association management solutions available on the salesforce.com app exchange, but to date has been focused mostly on the US market so would possibly need developed further for the specific requirements of UK customers.	See above	Adoption UK, Amnesty International, Compassion in World Farming, EveryChild, Greenpeace International, Lumos Foundation, Save the Children UK, Sightsavers International, SolarAid, War Child

CRM - open source solutions

System	Provided by	Resold by	Notes on company	Notes on system	Illustrative customers
CiviCRM	CiviCRM	Compucorp	Compucorp is a small consultancy firm based in Shoreditch that specialises in implementing CiviCRM solutions for its clients.	CiviCRM is created by an open source community coordinated by CiviCRM LLC. CiviCRM is a web-based, open source software constituent relationship management and fundraising solution. CiviCRM is web-based, internationalised, and designed specifically to meet the needs of advocacy, non-profit and non-governmental groups.	Wikimedia UK, Disability Rights UK, PSHE Association, Tavistock Centre, Association of Teachers and Lecturers
CiviCRM	CiviCRM	MTL Software Solutions Ltd	Miller Technology Ltd (MTL) is a commercial organisation which has supplied membership and contact management (CRM) systems to the not for profit for approximately 30 years and which now contributes to the CiviCRM open source community and acts as implementation consultants.	As above	British Association of Adoption and Fostering, Central Association of Agricultural Valuers, British Humanist Association, Primary Care Respiratory Society, Personal Support Unit, International Project Finance Association
CiviCRM	CiviCRM	Veda Consulting	Veda Consulting was formed in September 2011 and focuses on providing CRM solutions to the not for profit sector. They have contributed back to the CiviCRM open source community numerous extensions such as for paperless direct debits, charities' online Gift Aid submission and scheduled reminder tracking.	As above	Leukaemia & Lymphoma Research, European Social Network, NIAB TAG
SugarCRM	SugarCRM Inc.	Many	SugarCRM is a provider of open source customer relationship management (CRM) software. They were founded in 2004, and have over 150 employees, more than 7,000 customers and half a million users.	Open source, SugarCRM offers four different subscriptions to meet the needs of small and medium-sized companies, large enterprises and government Organisations. Offered in the Cloud or on-site.	Visit England, Cells4Life, Affinity 4, athenahealth, Axxes, Bord Iascaigh Mhara (BIM), Center on Asia and Globalisation (CAG), Hillel: The Foundation for Jewish Campus Life, CAP'TRONIC