

Guide To CRM Systems



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This guide is aimed at third sector organisations of all types and sizes – including charities, membership organisations and arts and cultural organisations. It aims to provide a high-level overview of the market for CRM systems for third sector organisations in the UK.

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What does your CRM system need to do?

A CRM system for a third-sector organisation typically needs to provide – in terms of functionality and capabilities – more than a similar system would need to deliver for a private sector or commercial enterprise. For each type of non-profit organisation the requirements are also going to be slightly different – fundraising functionality for some, membership management capabilities for others – and the work required to implement these solutions can also often be more complicated and involved than in a commercial organisation without these needs.

The diagram below illustrates just some of the key areas of functionality and capability that we would expect to be delivered by CRM solutions aimed at the third sector.



The first step towards finding the right solution for your organisation is – however – not to start with your requirements, but – instead – to start with the scope of your project. Does the CRM system need to support service delivery and engagement with beneficiaries – or is it just needed to support fundraising? If you are a membership organisation, do you expect your CRM system to also include tools that enable members to join and collaborate online? For an arts and cultural organisation, what ticketing and ecommerce platforms do you need the system to integrate with? Defining the scope of your project can provide a valuable context for your project – as some systems will really only support part of your organisation, whilst others will be much better at scaling across all your teams.

How CRM systems have evolved over the last decade

The modern CRM system is a much more sophisticated tool than the 'donor databases' of yesteryear. Modern CRM solutions offer the ability to ingest data from online giving platforms, ecommerce and ticketing solutions, and third-party tools to support volunteer management, charity retail 'EPOS' systems, lotteries etc - and to do so in real or near-real time. Importing transactional data into CRM systems is becoming easier, but integrations with marketing solutions, websites, finance systems, fundraising platforms and other digital products are becoming more functional and complex. Whilst the vast majority of Adapta customers use the CRM as their "single customer view" other options - i.e. specialised customer data platforms and general purpose data platforms - exist and are starting to be adopted.



Modern platforms of engagement can now truly scale across an organisation - combining a core data platform, integration capabilities, process-based low-code solutions, and industry-specific add-ons that enable organisations to build better relationships and provide better services to all their stakeholders, derive quality insight from data, and become both much more effective and efficient at what they do.

With even some of the newer proprietary systems such as Beacon and Donorfy leveraging some of the power of the large-scale investment and R&D spend provided by commercial technology platforms, even small third sector organisations can now benefit from some of the most modern technology available, and use that to generate income and engagement, and to deliver high-quality support to beneficiaries and members.

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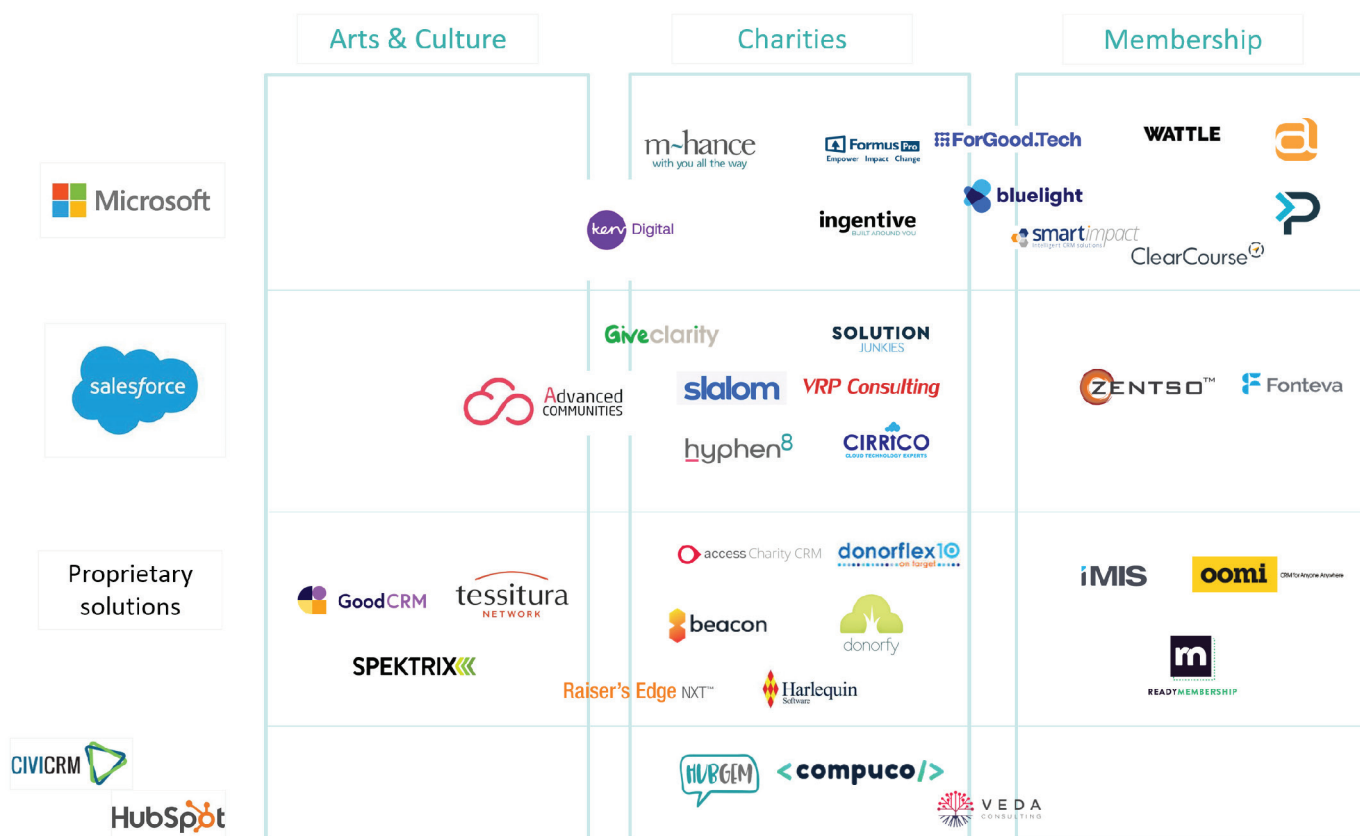


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The CRM system market today

The last decade has seen more established players being challenged by new entrants to the market, and platform-based solutions from the likes of Microsoft and Salesforce evolving to offer new solutions supported by a network of implementation partners. The following diagram identifies just some of the most well-established CRM systems available to third sector organisations in the UK today – and the partners delivering those solutions. The diagram reflects the fact that the CRM system marketplace can be categorised by different solutions and partners with different areas of focus – i.e. fundraising charities, membership bodies, and arts and culture organisations.

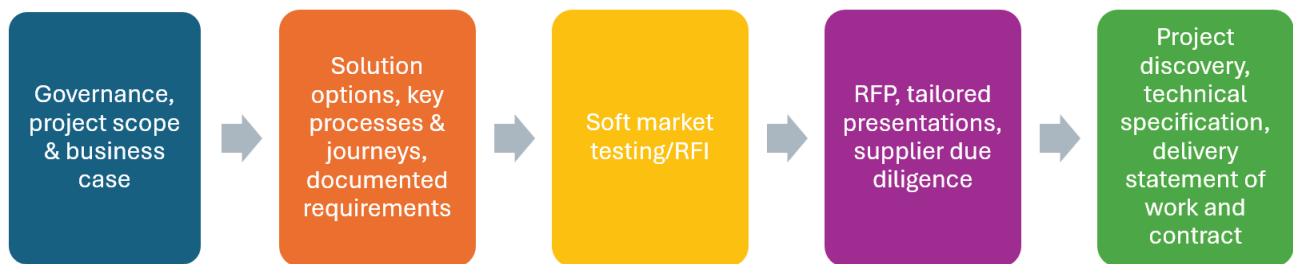
Another way of looking at the market is to note that there are a number of providers who specialise in implementing and developing commercial CRM platforms such as the offerings from Microsoft, Salesforce and even HubSpot to deliver solutions to support fundraising, membership etc – whilst others are proprietary solutions provided and developed by companies dedicated to those products.



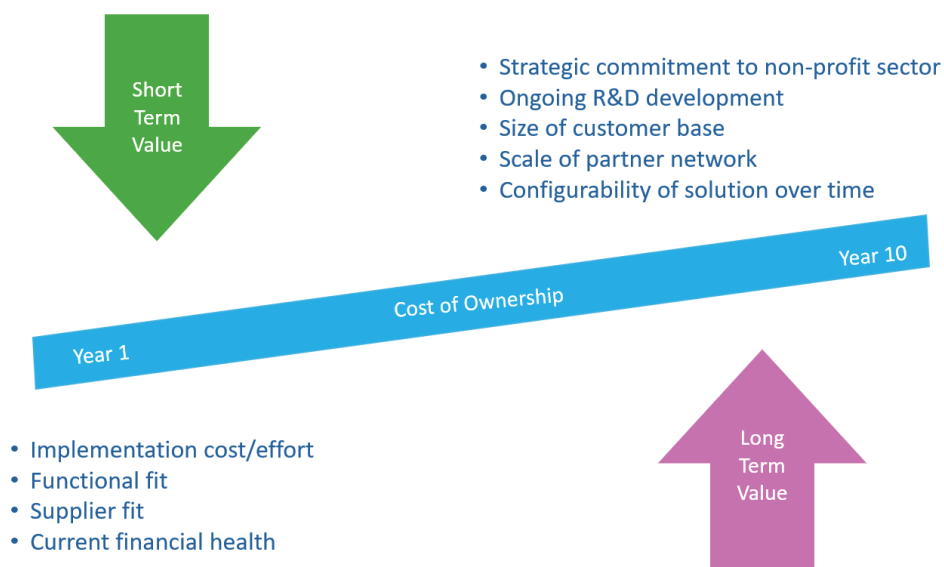
One thing that is common across the market, however, is that the landscape of providers to the market is constantly evolving. Some proprietary systems that were once popular have lost market share, whilst some new entrants to the market have proven wildly popular – and potential acquisition, and the implications for support and product development – is always a factor to bear in mind. Similarly, the ecosystem of Salesforce and Microsoft partners operating in the sector is also subject to constant change, and companies are bought and sold, key staff move on, and Microsoft and Salesforce themselves continue to innovate and offer new solutions. For further information on specific suppliers, solutions or the CRM systems market in general please contact Adapta directly (or attend any of the well-attended events we deliver each year on this topic).

Comparing and selecting CRM systems

CRM system vendors all have different ways of marketing their products that can make comparison and selection hard. As such, Adapta have developed a tailored approach to help our clients compare and select market solutions. The graphic below illustrates the approach – starting with ensuring good governance is in place, and engaging with selected potential suppliers to effectively gauge how well the company, the software, and the services offered matches what the organisation is looking for.



However, Adapta do not recommend you select a CRM system simply because it offers the best functional fit. It is not unusual for organisations to operate the same system for over 10 years by which time you and the software vendor will likely be in a very different place. What is it that makes a product likely to be a good fit for you 10 years down the line? The diagram below shows how selection considerations fade with time; immediate concerns such as “functional fit” and “cost of implementation” look less relevant years later. To future proof your investment, you need to consider other factors as suggested in the diagram below:



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How we can help?

We can help you select a CRM system that will support your current and future organisational requirements.

Why Adapta

Adapta are independent, not resellers, and do not receive any commission or income from suppliers. We are specialists in CRM systems for the not-for-profit sector with knowledge we have built up over many years. With our proven and practical approach, developed over many years of assisting non-profit organisations of all sizes, we can guide you through the whole procurement process taking into account your culture and capabilities as well as the technical requirements.

Organisations we have helped with their CRM systems project, include:





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