



adapta

processes, people and technology

A guide to CRM software for charities and not for profit organisations



Introduction

Welcome to this year's Guide to CRM software for charities and not for profit organisations.

2018 saw the full implementation of new data protection legislation, and the organisations we work with were using the Adapta guide to search out software and suppliers to help them address the technology challenges. Those programmes and projects are still underway, but we are starting to see good data governance and a more strategic approach to information management taking root. It's still early days, but senior managers and trustees in many larger bodies are demanding a more coherent approach to information systems implementation – one of the unexpected benefits of GDPR!

That said, successful CRM implementation continues to be a rarity. The reasons why projects struggle are many and complex, but our consultants' experience is that there are probably five main issues:

1. The CRM requirements in non-profit organisations are generally much more complex than most people realise (until it's too late). Consequently, most trustee boards and senior leadership teams underestimate the true cost and therefore underinvest in the resources required.
2. Charities (particularly, but membership bodies, trusts and others as well) *"... didn't get to where they are today by getting bogged down in process.."*. However, building a CRM system is like building a house, you need to plan, employ a good architect, find experienced builders and allow enough time to do the job properly.
3. A project manager is essential – no matter how (apparently) small the project. Implementation is all about decisions – hundreds of them. Project managers are essential in reaching decisions and making progress. Good ones are expensive; but that doesn't reduce their necessity.
4. Like so many things – from cars to babies – a CRM project needs constant fuelling. The fuel for CRM is senior management commitment; without that, the project will just slow down and stop.
5. Counter-intuitively, in the end, it isn't ever about the technology... All of the suppliers listed in our guide offer great software solutions and years of experience in implementation – but none of that will deliver a return if there is confusion about organisational objectives, priorities and the processes that CRM needs to support.

We are all so busy – and technology can help in amazing ways. The CRM landscape has never been richer or more vibrant with opportunity. Our 2019 guide will introduce you to some of the very best software and suppliers in the sector. Success is more possible now than ever before and we look forward to working with you to achieve it.

Adapta Consulting

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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 within a charity or 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 charities and 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 charity and not for profit sector as a whole or an individual organisation has to be purchased or developed. Some software suppliers have developed additional NFP relevant functionality available to purchase.

Finally, **Open Source** systems used within the charity and not for profit 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 charity and not for profit sector.

Adapta Consulting is familiar with each of the software 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.

CRM - Products

Package name	Made by	Resold by	Notes on company
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.
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.
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.
Aptify	Aptify	N/A	Aptify offers 21 out-of-the-box applications suited for mid to large sized charities and not for profit organisations. Their robust menu of membership management software is designed to enhance convenience, connectivity, communication, and collaboration for your organisation and your membership.
AudienceView	AudienceView Ticketing Corporation	N/A	
Beacon	Beacon	N/A	Beacon is one of the newest entrants to the charity CRM market. The founders come from a Silicon Valley start-up background, but wanted to build a more impactful and socially responsible business, so they created Beacon as a social enterprise - exclusively for not for profits.

Notes on system	Illustrative charity/non-profit customers
<p>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.</p>	<p>Birmingham Royal Ballet, World Development Movement, Wymonham College, Bibic, St Clare's Hospice.</p>
<p>Affiliate is RedSky IT's flagship product for the not for profit sector. It is an integrated set of management solutions for charities, 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.</p>	<p>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).</p>
<p>Alms.net is a fundraising, membership and grants solution. It allows not for profit organisations to adopt Best Practice methods quickly and effectively for each business process.</p>	<p>CBM UK (formerly Christian Blind Mission), UNICEF UK, Mencap.</p>
<p>The CRM enterprise functionality set is an advanced system of tracking member and non-member demographic information in the database. Philosophically, Aptify treats constituents in the database as they are in real life: individuals/ organisations first, and members second — meaning that the client can track members and non-members in the software in unique ways with the same degree of power and flexibility, and then easily add/manage membership attributes when applicable. The Aptify CRM tool allows a staff member to cleanly view system-wide information related to a constituent, in a single and easy to-navigate location, while also allowing for configurable displays and data entry formats. For companies and individuals, staff members can easily track an unlimited quantity of addresses, phone numbers, email addresses, preferred communication methods, job functions, contact logs, follow-up tasks, relationships, etc., for each record. Aptify offers fully integrated and robust membership management functionality.</p>	<p>Chartered Accountants of Ireland, The Law Society of Ireland.</p>
<p>AudienceView comes complete with integrated features, including ticketing, e-commerce, fundraising, customer relationship management (CRM), email marketing, content management (CMS) and analytics.</p>	<p>Marina Theatre, The Lowry, Edinburgh International Festival, Los Angeles Film Festival.</p>
<p>Beacon is clearly targeted at charities and it is adding new functionality at a rapid pace. It's flexible enough to store all data in one place, making it well suited for a wide range of use-cases - from fundraising & Gift Aid right through to programme and volunteer management. Beacon follows Google's design principles, so the product is modern and easy to use.</p>	<p>Big Change, Young Epilepsy, Goods for Good, Great Lakes Outreach, Chapel & York, Equality Now, Dogstar Foundation.</p>

Package name	Made by	Resold by	Notes on company
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.
Blackbaud CRM	Blackbaud	N/A	For the past 30 years, Blackbaud have been developing system software and services for not for profit organisations. Customer base of 27,000+.
Cantata Vantage CRM	Cantata, based on Microsoft/Salesforce	Cantata	Cantata is a UK-based, independent CRM specialist, and provides expertise in the membership and not-for-profit space. It has a large base of well-known UK clients. Cantata has a dedicated UK team for consultancy, implementation, support and training. Support is provided from their Oxford, UK support centre with a sales office in London.
CGHub	CommittedGiving Ltd	N/A	CommittedGiving Ltd is a successful and long standing specialist in online and digital fundraising and associated services to the third sector and others. They have been providing customised and tailored online and consultancy services since the late 1990's. Over 80% of their new business is directly sourced from personal recommendations and word of mouth.
CloudDonor	Advanced Computer Software ("One Advanced")	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.
CloudMembership	Advanced Computer Software ("One Advanced")	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.
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.

Notes on system	Illustrative charity/non-profit customers
<p>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.</p>	<p>Arts Insight, Find a Better Way.</p>
<p>Aimed at larger not for profit organisations, Blackbaud CRM is a flexible, scalable and secure CRM solution based on Blackbaud's proprietary 'Infinity' platform.</p>	<p>Breast Cancer Care, British Heart Foundation, Oxford University, Greenpeace International, BirdLife International, Jewish Child's Day, Children's Hospice South West, Highland Hospice.</p>
<p>Cantata Vantage is supported on both Microsoft Dynamics and Salesforce platforms. Using their experience, they are able to use Cantata Vantage to provide at least 80% of needs, out of the box.</p> <p>Cantata Vantage provides extensive additional functionality over the core CRM packages, including events management, publication distribution, powerful case management extensions and a variety of user interface improvements.</p> <p>For maximum flexibility, they offer both hosted or on-premises solutions. Allied to their methodology for the rapid delivery of specific additional configuration, data migration, deployment and training, it delivers a cost effective customer management solution.</p>	<p>Charity Commission, Advertising Standards Authority, Ofgem, PSA, IAB, The Jockey Club.</p>
<p>The CommittedGiving Hub (CGHub) is a state of the art back office admin application that is continuously evolving. It is a secure, password protected, web based application that can contain absolutely everything you need to manage your fundraising and associated activities. They build and manage all their software. You will not find the CGHub anywhere else or resold.</p>	<p>Buttle UK, Epilepsy Research UK, Ovarian Cancer Action, Macmillan Cancer Support, Tree Aid, Build Africa, University of Kent, VSO, Whizz Kidz, Fight for Sight, Blue Cross, Friends of the Earth Scotland, Age UK, Girlguiding, RNIB.</p>
<p>CloudDonor is for small to medium-sized organisations. It is specifically built for not for profit organisations with the added capabilities such as marketing campaigns, processing fundraising income, and management of merchandising.</p>	<p>Winston's Wish, George Müller Foundation (Müllers), Julia's House.</p>
<p>CloudMembership 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.</p>	<p>Not specified but Advanced claim to have over 1000 not for profit organisations as customers of its products.</p>
<p>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.</p>	<p>Over 5,000 churches and small charities use their products.</p>

Package name	Made by	Resold by	Notes on company
donorflex	Care Data Systems	N/A	Power, precision, depth, value, insight, inspiration, expertise, reliability, reassurance.... donorflex claims to deliver all this – backed by the team twice voted the IoF's Database Supplier of the Year. They are the only CRM supplier among the top six in the IOF's 2016 search for 'the most committed company to the sector'. They understand not for profits, and have done since 1988, when the donorflex system was developed to answer a critical need at Acorns Children's Hospice. Their clients include more than half the UK's hospice sector.
Donorfy	Donorfy	N/A	Voted as the best supplier in the 2016 and 2017 Fundraising Magazine Charity CRM survey, Donorfy is the company launched by founders Robin Fisk and Ben Brett to deliver cloud-based charity-focused CRM to UK not for profit organisations with the intention of reducing the complexity and costs previously associated with charity CRM. With over 200 clients (as at June 2017) and a partner network of onboarding consultants Donorfy is growing fast and proving that charity CRM can be easy to use, affordable and powerful.
DonorPerfect	SofterWare Inc.	DonorPerfect UK Limited	SofterWare Inc. is a US company formed in 1981. Their product has been localised for the UK and is sold and supported locally by DonorPerfect UK Ltd.
e-mango Membership Platform	Kimcell Ltd trading as e-mango	N/A	e-mango is a small web-development company started in 2000 and 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.
eTapestry	Blackbaud	N/A	For the past 30 years, Blackbaud have been developing software and services for not for profit organisations. Customer base of 27,000+.
Harlequin	Harlequin Software	N/A	Established in 1986, Harlequin supports over 300 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.

Notes on system	Illustrative charity/non-profit customers
<p>All the core functionality you want is standard. No hidden extras. And integrated Lottery and Raffle modules t0068at put their clients one step ahead the opposition in terms of seamless efficiency.</p>	<p>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.</p>
<p>Donorfy was voted the best product in the Fundraising Magazine Charity CRM survey in 2016 and 2017. It is a cloud-native CRM for UK not for profit organisations that runs on Microsoft Azure. It handles individual giving, major donors, trusts & foundations, corporate, legacies and community fundraising. It integrates with other cloud services such as MailChimp and JustGiving, and provides web widgets for online donations via Stripe and GoCardless. Customers can get up and running for free with Donorfy's onboarding service, or can use professional migration and training services from the partner network.</p>	<p>A Rocha UK, CARE, BBC Radio 4 Christmas Appeal for St Martin-in-the-Fields, Heart of England Forest, Amos Trust, Changing Tunes, Style Acre, No Limits, West Dean College, Bright Red, Newcastle United Foundation, Langdon Foundation.</p>
<p>DonorPerfect, a web-based solution, 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. It includes Constant Contact email marketing and integrates with QuickBooks.</p>	<p>National Youth Theatre, Amnesty International, Bristol Zoo, CBN Europe, Mercy Ships DonorPerfect is also used by UNICEF in over 30 countries worldwide.</p>
<p>e-mango provides an integrated solution that gives an organisation control of both their website and membership database in one solution. Pay for subscriptions, book for events, email marketing, online directories, members area.</p>	<p>Association of Professional Staffing Companies, British Coatings Federation, British Plastics Federation, Fine Art Trade Guild, Society of Garden Designers, British Compressed Air Society.</p>
<p>eTapestry is a cloud-based, affordable and robust fundraising solution for not for profit organisations. It is an easy to use and inexpensive database allowing access to donors, members, supporters, and volunteers.</p>	<p>Ark Cancer Care, Northwood African Education Foundation, Kilbryde Hospice, Ripple Africa, Scottish Epilepsy Initiative, Solace Women's Aid, VisionFund International.</p>
<p>Harlequin CRM can be used across an entire charity or within one department, such as fundraising or service delivery. The system is continually updated as a result of HUGs (Harlequin User Groups) and legislative requirements, such as GDPR/FPS. Harlequin CRM integrates with Harlequin's Charitable Accounting system.</p>	<p>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.</p>

Package name	Made by	Resold by	Notes on company
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 is now being sold and supported via iFinity as the sole channel in the UK and EU.
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 not for profit organisations.
MerlinCRM (previously called SodalitaS)	MillerTech	N/A	MillerTech (Miller Technology Ltd.) is a commercial organisation which has supplied membership and contact management (CRM) systems to the not for profit sector for approximately 30 years and which now contributes to the CiviCRM open source community and acts as implementation consultants.
NG	Advanced Computer Software ("One Advanced")	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.
OM.Net	3Si	N/A	3Si provides a fully flexible, highly configurable feature rich CRM with real-time web integration, and all the services to deliver that solution into your organisation, including project leadership, implementation consultancy and training all for a fixed price.

Notes on system	Illustrative charity/non-profit customers
<p>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.</p> <p>iMIS 20 is available for organisations of all types and sizes.</p> <ul style="list-style-type: none"> • 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. 	<p>Rethink Mental Illness, Royal College of Emergency Medicine, 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, ReThink Mental Illness, Royal College of Veterinary Surgeons, Royal Society of Chemistry, The Law Society of Scotland, The Royal College of Emergency Medicine, West & North Yorkshire Chamber of Commerce. Electrical Contractors' Association, Civil Aviation Authority International, British Transplantation Society, British Academy of Management, Royal Statistical Society.</p>
<p>KISS Contacts is a system that makes it easy to manage contacts, members and donors for societies, clubs, and associations.</p>	<p>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.</p>
<p>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.</p>	<p>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.</p>
<p>NG is for medium to large charities and educational establishments. Used by many top charities, NG charity database software is one of the leading CRM solutions to underpin fundraising, operations and services for medium to large charities.</p>	<p>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.</p>
<p>OM.Net is a versatile membership management system. It is designed by 3Si specifically for Trade Associations and others in the not for profit sector. OM.Net manages Membership, Events, Abstract & Grants and Sales with Web Tools to empower your members to self-serve. OM.Net can be accessed across different platforms, giving you the option to utilise its functionality whether you are sitting at your desk in the office, working remotely from home, attending an event or visiting a customer overseas.</p>	<p>NFU, Engineering Construction Industry Association, Mensa, BPIF, IHEEM, Trading Standards Institute, ENTUK, Association of Teachers of Mathematics, Aerospace Defence Security Group British Gliders Association, ISM, National Federation of Occupational Pensioners, Society of London Theatre & UK Theatre, The Loan Market Association.</p>

Package name	Made by	Resold by	Notes on company
oomi	Centrepoint Computer Services	N/A	oomi is part of Centrepoint, a company that has been supplying membership and fundraising software to not for profit organisations for over 25 years.
Oracle NetSuite	NetSuite	N/A	Oracle NetSuite is the world's leading provider of cloud-based business management software, used by over 40,000 organisations. Through NetSuite.org they offer a donation programme, ensuring charities get the core platform, and significant discounts on users and modules.
Pro9	ProTech Computer Systems Ltd	N/A	For more than 20 years ProTech has been delivering specialist CRM software and change management services to the not for profit sector.
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).
Raiser's Edge NXT	Blackbaud	N/A	For the past 30 years, Blackbaud have been developing software and services for not for profit organisations. Customer base of 27,000+.
SheepCRM	Croftware Ltd	Sheep Tall Projects	Croftware Ltd was established in 2011 by ex-Amazon engineering manager James Webster. They are passionate about helping small companies and not for profit organisations.

Notes on system	Illustrative charity/non-profit customers
<p>Launched in 2014, oomi[®] is a specialist cloud based CRM solution for Membership bodies and Trade Associations. oomi[®] offers extensive out of the box integration capabilities with accounting solutions, website platforms, and a range of applications including office, email marketing, Post Codes, SMS/telecoms etc.</p>	<p>The Gemmalogical Association of Great Britain, The Design & Technology Association, National Hairdressers' Federation, Energy UK, Energy Institute, Arthritis Care, Nautical Institute, Transaid, The Anglo-Omani Society.</p>
<p>NetSuite provides a single integrated system comprising Finance, CRM, Projects & E-Commerce, delivered as a true SAAS product across the internet. The CRM encompasses Grant & Donor Management, Fully Integrated Gift Aid and Program Management.</p> <p>NetSuite addresses global multi-national charities with true localisation and language capabilities and has many of the world's top 100 charities as clients.</p>	<p>AbilityNet, UK Youth, YouGov, Foundation Center, Found My Animal, Good360, Bonneville Environmental Foundation.</p>
<p>Pro9 CRM software operates in a Microsoft environment and delivers easily configurable specialist not for profit modules with CRM, workflow, process automation and reporting capability at their core: Membership & Subscriptions, Learning & Education, CPD, Event Management, Annual Appeal, Fundraising, Marketing & Campaigns.</p> <p>By adding ProWeb, (secure digital platform) and ProCloud (a fully managed Cloud CRM offering) to its specialist CRM and change management solution portfolio, ProTech delivers a Government 'OFFICIAL' security accredited fully integrated web and CRM platform.</p>	<p>Chartered Management Institute, ICAEW (Institute of Chartered Accountants in England and Wales), Salvation Army, Association for Project Management, Chartered Institute of Internal Auditors, College of Policing.</p>
<p>ProgressCRM offers mid-sized organisations a packaged and upgradeable fundraising solution. It is still being supported by ASI but not actively marketed.</p>	<p>Action for Blind People, Sightsavers International, Lincolnshire Wildlife Trust, Evangelical Alliance, The Children's Trust, Dreams Come True Charity.</p>
<p>The Raiser's Edge is a well-established, flexible, scalable and secure Customer Relationship Management (CRM) and fundraising solution.</p>	<p>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.</p>
<p>Sheep's simple back-office solutions helps not for profit organisations streamline their communication, membership, fundraising and venue management activities. Sheep is a cloud-based product that integrates with the tools you are already using: (MailChimp, Eventbrite, Google Calendar, Xero, Wordpress GoCardless etc).</p> <p>Simple product based pricing with unlimited users, data & support.</p>	<p>Scottish Association of Landlords, Arts at the Old Fire Station, Greenbelt, Anglican International Development.</p>

Package name	Made by	Resold by	Notes on company
Spektrix	Spektrix	N/A	<p>Spektrix is powerful and innovative cloud-based box office, marketing and fundraising software for arts organisations.</p> <p>In addition to cutting edge technology, they take a holistic approach to support, delivered by a dedicated team included in the cost. That means unlimited support services beginning on day one, implementation, strategic advice to get the most out of the system and training when needed. All of this comes from people who worked in the arts, so they know where you're coming from.</p>
SRO	Top Tix	N/A	<p>Toptix was formed and launched SRO (Standing Room Only) in 2000. In 2010, the company completed a ground up rewrite of the SRO system and adding functionality on a new, improved and modern infrastructure and open/cloud computing ready. In 2017, TopTix was acquired by SeatGeek, A mobile-focused ticket platform that enables fans to buy and sell tickets for sports, concert, and theater events.</p>
Stratum Black	APT Solutions Ltd	N/A	<p>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.</p>
Tessitura CRM	Tessitura Network	Tessitura Network Ltd	<p>The Tessitura Network is a not for profit technology and services company owned and governed by its arts and cultural users.</p> <p>A mission-focused company dedicated to providing superior software, support, learning resources and community services to meet the needs of its member organisations.</p> <p>User community input drives company priorities. A distraction-free open user environment encourages networking, learning, and best practice sharing.</p>
thankQ	Access Group	N/A	<p>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.</p> <p>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.</p>

Notes on system	Illustrative charity/non-profit customers
<p>Spektrix provides a comprehensive range of tools for ticketing, customer relationship management, reporting, analysis, customer segmentation and giving management. It is backed up by a dedicated support team who have strong crossover arts and technical expertise. Every interaction a customer has, whether that's donating or opening an email, gets recorded against a unique customer record. You can then work with that data in all kinds of ways across your organisation – from using their analysis tools to segment loyal customers and donors and target them with memberships using integrated email marketing, to recognising major donors at the box office. With a single customer view at its core, Spektrix's tools help arts organisations to increase donations and revenue, and grow audiences.</p>	<p>Not for profit arts organisations make up approximately half of their 300-strong client base.</p> <p>Examples include:</p> <p>West Yorkshire Playhouse, Soho Theatre, Rose Theatre Kingston, Bikeshed Theatre Exeter, Culture Warrington, Octagon Yeovil, Lyric Theatre & Studio Belfast, Llangollen International Musical Eisteddfod.</p>
<p>SRO is a Ticketing, Marketing, CRM, Fundraising and Access Control platform designed to improve the way that live entertainment and user experience products are promoted, packaged and sold. SRO clients manage the sale of tickets, subscriptions, memberships and merchandise as well as take donations through a single basket approach; track loyalty with a real time CRM back end; and integrate with best of breed third-party products using an API.</p>	<p>English National Opera (ENO), Royal Collection Trust, London Transport Museum, Winchester Cathedral, Forestry Commission, Buckingham Palace. George W. Bush Presidential Library and Museum.</p>
<p>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.</p>	<p>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.</p>
<p>Tessitura Network offers unified software application designed specifically for non-profit arts, cultural and entertainment organisations covering CRM, ticketing, memberships, fundraising, marketing, business intelligence, online transactions, access control, mobile transactions / engagement, and more. Tessitura provides comprehensive services to support and enhance the success of cultural organisations resulting in deeper audience engagement, unparalleled organisational efficiency, increased revenue and more time devoted to the advancement of your mission.</p>	<p>Their products and services are utilised by more than 570 arts and cultural organisations in 10 countries. Client include The Royal Opera House, Southbank Centre, National Portrait Gallery, and over 60 other organisations.</p>
<p>thankQ is a CRM software with configurable modules, specially designed for not for profit organisations.</p>	<p>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.</p>

Package name	Made by	Resold by	Notes on company
Workbooks CRM	Workbooks Online Ltd	Mainly sold directly	<p>Workbooks provides an award-winning, cost-effective, cloud-based CRM platform that many charities, trade associations and not for profit organisations are using to improve membership management, maximise fundraising and optimise their relationships with donors, volunteers and supporters.</p> <p>Workbooks is a successful British company, developing software at its offices in Reading, Berkshire, and operating the CRM service from data centres in the UK to ensure data is fully-protected by UK and EU laws.</p> <p>Workbooks also provides all of the consultancy, business analysis, change management and training needed for a successful implementation, with a focus on high levels of user adoption that deliver benefits quickly and maximise ROI.</p>
YM Membership	YourMembership	N/A	<p>Since its foundation in 1998, YM claims to be the largest vendor globally for membership and not for profit dedicated software as a service. YM helps 20 million members engage with 5,000+ organisations in 32 countries. In 2015 YM established permanent offices in the UK to support a rapidly growing client base in the UK and Europe.</p>

Notes on system	Illustrative charity/non-profit customers
<p>From increasing membership and fundraising with easy gift aid management; through targeted campaigns and integrated event management; to customisable dashboards and advanced reporting, Workbooks provides ambitious not for profit organisations with the tools to exploit their online presence, manage activities and interactions, and use automation to streamline operations. With an effective implementation methodology and seamless integrations, Workbooks is easy to customise to meet unique organisational requirements.</p>	<p>Coeliac UK, Chartered Accountants Benevolent Association (CABA), Knowledge Transfer Network, National Federation of Builders, National Landlords Association, Scottish Motor Trade Association (SMTA), The Tenancy Deposit Service, British Association of Landscape Industries (BALI).</p>
<p>YourMembership’s web, CRM, CMS, social, and mobile enabled member engagement platform claims to be the strongest end-to-end solution in the market for member based organisations – helping reduce costs, increase value, and save time. Also available are YM Careers (for running job boards) and YM Learning (a powerful online learning platform that is used to manage 9.8 million course enrolments and 3.4 million course awards annually).</p>	<p>RenewableUK, UK Trial Managers Network, The Institute of Highway Engineers, International Association of Oral and Maxillofacial Surgeons, Association Management Companies Institute, International Association for Healthcare Security and Safety.</p>

CRM Platforms - Microsoft Dynamics CRM solutions

System	Provided by	Resold by	Notes on company
Microsoft Dynamics (branded as "NFP Dynamics")	Advanced Computer Software ("One Advanced")	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.
Microsoft Dynamics 365 (sold with pre-built charity modules as "Rhythm")	Microsoft	Chorus	Chorus are Microsoft cloud experts based near Bristol. Founded in 1999, Chorus help organisations adopt and benefit from cutting-edge Microsoft technologies across Azure, Microsoft 365, Dynamics 365 and SharePoint.
Microsoft Dynamics 365	Microsoft	Core	Core is a MS Gold partner consultancy with specialisms in insurance Government and Membership. 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.
Microsoft Dynamics CRM	Microsoft	Felinesoft	<p>Felinesoft are a complete end to end CRM, web and app development specialists with 12 years' experience, offering a full range of services from business analysis and user experience design, to software development and systems integration.</p> <p>As a Microsoft Gold Partner, they specialise in Dynamics CRM. What separates them from within the marketplace is that they have a wealth of experience in integration with other systems and take a very much user centric approach, aligning business needs and processes, alongside user needs to create a robust scalable solution that is fit for purpose, using industry standard development methods and concepts.</p>
Microsoft Dynamics CRM	Microsoft	FleXRM	<p>They are a young dynamic company registered in March 2013. Their team has over 40 collective years' experience working with Dynamics CRM. This experience ranges from version 3 back in 2005 right through to the latest version of Dynamics 365.</p> <p>They believe in concentrating their resources to allow them to work closely with their clients. This gives them the opportunity to offer a close and personal way of working that some larger solution providers are unable to supply. They strive to offer the best customer service possible as satisfaction and retention of their clients are key to their business.</p>

Notes on system	Illustrative charity/non-profit customers
<p>NFP Dynamics is delivered by Advanced’s specialist CRM team, and claims to provide a seamless integration between their NG product (see elsewhere in this guide) and Microsoft Dynamics CRM. The intention is to deliver a solution that meets the precise needs of the customer. Advanced are one of the top 60 Microsoft partners in the world and are a member of the ‘Microsoft Inner Circle’.</p>	<p>None specified on website, but as an organisation Advanced has a substantial NFP customer base.</p>
<p>Rhythm is a not for profit and membership accelerator for Microsoft Dynamics 365. This provides pre-built modules for Dynamics 365, which cover member management, fundraising, donations, recurring payments, communications and Gift Aid automation – and comes with a self-service member/donate portal to integrate with your website.</p>	<p>Butterfly Conservation, HorseWorld, The Donkey Sanctuary.</p>
<p>Dynamics 365 is a platform developed by Microsoft.</p> <p>Core has developed accelerators and modules aimed specifically at not for profit organisations.</p>	<p>DIT, Royal College of Ophthalmologists, Association of British Insurers, Pure Leisure Group, Fresh Tracks, PJ Valves.</p>
<p>The framework that they have developed on the Microsoft Dynamics platform has been specifically tailored to the not for profit sector in configurable modules. These include:</p> <ul style="list-style-type: none"> • Base, includes identity, single sign on for integration with websites • Membership, includes Membership renewals • Events booking • Education, including CPD (Continuing professional development) • Ecommerce • Fundraisingand more. <p>They understand that each organisation is unique, and have kept these modules as configurable and extendable building blocks to create the ideal solution. They also offer bespoke development to support specific business needs.</p>	<p>The British Association of Counselling and Psychotherapy, The Geological Society.</p>
<p>Dynamics CRM is a platform developed by Microsoft.</p> <p>FlexRM have developed modules to provide functionality to manage Memberships, Events and Qualifications.</p>	<p>Many customers covering various sectors including membership organisations, global event companies, local government and multi-national organisations. Not for profit customers include the Association of University Administrators.</p>

System	Provided by	Resold by	Notes on company
Microsoft Dynamics 365	Microsoft	Incremental Group	Incremental Group is a digital technology business and a leading Microsoft Gold Partner. It has a large team of consultants across the UK. Incremental are one of the few UK Microsoft Partners that support the entire Dynamics 365 range.
Dynamics 365 and NFP 365	Microsoft	m-hance	m-hance is focused solely on delivering long-term solutions to their clients, based on Microsoft Dynamics 365 and associated Microsoft technologies such as O365, PowerBI, ADX Studio Portals and SharePoint. m-hance experience and commitment to the not for profit sector has enabled them to design and build NFP365 which is a pre-configured data model that extends the core CRM capabilities to incorporate not for profit specific processes and best practice. Rich functionality such as fundraising, volunteer management and GDPR requirements available 'out the box', reduce implementation time and costs. This enables them to configure specific requirements to each organisation they engage with, to deliver many successful projects, such as Oxfam Ireland, Solent Mind and St Vincent de Paul.
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.
Microsoft Dynamics 365	Microsoft	Preact	Founded in 1993, Preact is a leading CRM company, specialising in Microsoft Dynamics 365. They are based in Berkshire.
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.
Microsoft Dynamics 365 (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, specifically Professional Membership, Trade Associations, Unions, Regulators and the Arts & Heritage.
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. They accelerate the digital transformation of not for profit organisations by integrating CRM, websites, portals and their customers' legacy systems to create a single view – enabling them to better engage with and service their supporters, members, donors and volunteers.

Notes on system	Illustrative charity/non-profit customers
<p>Microsoft's CRM offering, Dynamics 365 Customer Engagement, is three modules of the same CRM tool which can be used for different purposes across your organisation - managing engagement, marketing and business development/fundraising. Each solution sits on the Customer Engagement platform with inbuilt intelligence, the same database and much of the same functionality.</p>	<p>Shelter, Crisis, Girlguiding, Barnet London Borough, Healthcare Financial Management Association, Mencap, Robert Gordon University, Smart Works, Aberlour, The Outward Bound Trust, retailTRUST, Scouts, Forestry Commission Scotland, NHS.</p>
<p>Dynamics CRM is a platform developed by Microsoft.</p> <p>m-hance has developed add-ons and templates aimed specifically at not for profit organisations, including support for fundraising activities.</p>	<p>Over 150 implementations for business management solutions in the not for profit sector. Clients include Age Action Ireland, Society of St Vincent de Paul Ireland, Central YMCA, Oxfam Ireland, Solent Mind.</p>
<p>Dynamics CRM is a platform developed by Microsoft.</p> <p>Out of the box, the product focuses mainly on sales, marketing, and service (help desk) sectors.</p>	<p>North East Chamber of Commerce, Mental Health Matters, NCFE, Dementia Care, UK Commission for Employment and Skills.</p>
<p>Dynamics CRM is a platform developed by Microsoft.</p> <p>Out of the box, the product focuses mainly on sales, marketing, and service (help desk) sectors.</p>	<p>Mencap, Livability, AgeUK Islington, Hearing Dogs for Deaf People, National Energy Foundation, Sense, Children's Food Trust, Ben – The automotive industry charity.</p>
<p>Dynamics CRM is a platform package developed by Microsoft.</p> <p>Out of the box, the product focuses mainly on sales, marketing, and service (help desk) sectors.</p>	<p>Roffey Park, Comic Relief, Institute of Environmental Management and Assessment, Community Integrated Care, Crisis, City University London, National Offender Management Service Disability Law Service.</p>
<p>Silverbear has developed an online membership software solution built on Dynamics 365. Microsoft continues to recognise the Silverbear Membership solution as being the only Dynamics 365-based membership solution to meet the standards required to achieve the Dynamics (CFMD) accreditation.</p>	<p>Institute of Directors, The Institute of Engineers and Technology, British Veterinary Association, Royal Academy of Dance, The Law Society, Country Land and Business Association, Chemical Industry Association, London & Partners, Energy Industries Council, Royal College of Nursing, British Medical Association, NAHT, Royal Botanical Gardens (Kew), V&A, Natural History Museum and British Library.</p>
<p>Dynamics CRM is a platform developed by Microsoft.</p> <p>At the heart of their web system is Kentico, the only fully integrated membership CMS, e-commerce and marketing solution designed to give fully optimised and personalised experiences for members.</p> <p>SmartMembership adds a layer of modules to provide a broad range of functionality aimed at membership organisations.</p>	<p>The Bar Council, Royal Town Planning Institute, The Institute of Learning & Management, Institute of Fundraising, Advantage Travel Partnership, NHS Providers, Countryside Alliance, Helplines Partnership, European Society for Radiotherapy and Oncology and Racehorse Owners Association.</p>

System	Provided by	Resold by	Notes on company
Microsoft Dynamics 365 CRM	Microsoft	Trillium	Trillium deliver digital transformation for membership and charity organisations. They are experts in supporting the CRM challenges and ambitions unique to the not for profit sector.
Microsoft Dynamics CRM (with proprietary templates) ('Tribe')	Microsoft	TSG	TSG is a well-established provider of membership software to smaller organisations.
Microsoft Dynamics 365	Microsoft	Wattle	<p>Wattle are a creative technology company that forms long-term strategic partnerships with membership organisations, charities and other not for profit organisations.</p> <p>They help drive membership and donor acquisition, engagement and growth through the deployment of their Membership Experience Platform - MemEx.</p> <p>Their full range of services enable them to assist organisations with fully integrated website CMS builds, CRM solution deployments, portal developments, complex bespoke software developments and system integration projects.</p>

Notes on system	Illustrative charity/non-profit customers
<p>They've developed Dynamics 365 solutions that enable easy management of all aspects of the membership & donor life cycle and experience. This includes: insights & reporting; finance; donor nurture & engagement scoring, fundraising; marketing & comms.</p>	<p>Delivered Dynamics solutions for over 50 charity and membership NFP clients (small and large) including: The Law Society, Royal College of Physicians, The Soil Association, Action on Hearing Loss, Association of Optometrists.</p>
<p>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.</p>	<p>Institute of Psychoanalysis, Institute of Translation and Interpreting.</p>
<p>Dynamics 365 forms the core of Wattle's Membership Experience Platform – MemEx.</p> <p>MemEx delivers end-to-end membership and donor management for membership organisations, not for profits and charities of all types.</p> <p>MemEx unifies two of the sectors most popular cloud technologies, Umbraco's CMS for website and member / donor self-service portal development and Microsoft's Dynamics 365 CRM for end to end membership / donor management.</p>	<p>Timber Research & Development Association, The Chartered Institute of Arbitrators, The Chartered Institute of Marketing, Institute of Asset Management, British Property Federation, Jisc.</p>

CRM Platforms - Salesforce solutions

System	Provided by	Resold by	Notes on company
Salesforce	Salesforce	BrightGen	<p>Founded in 2006. BrightGen is a Platinum Salesforce Consulting Partner and focuses solely on Salesforce as its cloud platform. BrightGen is the most highly certified partner in the UK with extensive experience with not for profit customers and a solution created specifically for the sector, BrightGiving. With over 100 employees all in-house and UK based, more than 350 Salesforce certifications and 600 successfully completed projects, BrightGen is the Platinum Partner to guide customers through their digital transformation. Rating of 9.76 (out of 10) for customer satisfaction on the Salesforce AppExchange.</p>
Salesforce (all Clouds)	Salesforce	Cloud for Good	<p>Cloud for Good is a Salesforce.org Global Premium Partner that works with not for profit organisations, K-12 schools, higher education institutions and the public sector, to implement transformational Salesforce solutions.</p> <p>By blending their extensive Salesforce expertise with their not for profit, higher education and public sector experience, Cloud for Good delivers innovative strategic services that help high performing organisations create a positive change in their communities.</p>
Salesforce	Salesforce	CoronaGrey	<p>CoronaGrey was set up in February 2017. There is a team of 8 specialists, all who have over 10 years Salesforce experience, with relevant Salesforce accredited certifications. Their parent company, CCR, has been specialising in data driven solutions for 20 years.</p> <p>They focus their operations and efforts in the not for profit Salesforce sector with direct experience in:</p> <ul style="list-style-type: none"> • ·Lead Management • ·Event Management • ·Fundraising • ·Volunteering • ·Grant Making • ·Membership • ·Donations and banking.
Salesforce	Salesforce	Economic Change	<p>Economic Change CIC is a niche management consultancy working with small to large charity and not for profit organisations. Their experienced team specialise in Salesforce Implementations to help their clients improve management processes and reporting for fundraising, stakeholders, impact and volunteer management. Established as a brand in 2015 they operate as a social enterprise, and as part of their work they help young people and mothers return to work by providing salesforce training and work experience.</p>

Notes on system	Illustrative charity/non-profit customers
<p>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.</p>	<p>Samaritans, RSPCA, The Challenge, Landmark Trust, Barnados, Al Khair Foundation, Lloyds Register, Heathrow Airport, Crown Commercial Service, British Standards Institute, BDO, Vue Cinemas, Thames Water, Plymouth University, Guardian News media, Rolls Royce.</p>
<p>Salesforce Nonprofit Cloud gives you a 360-degree view of your mission. It's a platform built with a community of over 30,000 trailblazers. It's the only platform that brings you the power and flexibility of Salesforce, the world's #1 CRM. Nonprofit Cloud can power your entire mission: track and measure impact in real time, raise more with AI-driven insights on donors, and take every constituent on their own personal journey.</p>	<p>Make-A-Wish Ireland, Patrons of the Arts in the Vatican Museums, Regenerate UK, NL Cares, Active Philanthropy Germany.</p>
<p>CoronaGrey offers solutions that put the user and the customer first. This allows combined multi-channel working and outcomes, simple deployment and provisioning of services, detailed reporting and analytics that have previously taken weeks or even months to assemble, now available in real-time by the user. CoronaGrey's preferred approach is to deliver as much value for as low a cost as possible. They do this by configuring standard Salesforce functionality to the core build to minimise development. CoronaGrey opts for a “Clicks over Code” approach to all configuration or customisation requirements. Salesforce.com is a highly robust tool offering a high degree of flexibility. Where customisation is required it will be kept to a minimum by customising only essential elements that cannot be configured in a conventional way.</p>	<p>NCRI, RNIB, Prince's Teaching Institute, Marie Curie, NCS, Design and Artists Copyright Society (DACS), London Youth, Readathon, AMAR International Foundation, Awards for Young Musicians and City University.</p>
<p>Salesforce can be fully customised and tailored to help not for profits manage and track their delivery of services, intended impact, fundraising and marketing activities. Using Salesforce Community licenses, beneficiaries, volunteers or partners can gain secure access to the system to update information or collaborate using Salesforce1 and Chatter, the native online community functionality accessible via phone, tablet or computer.</p>	<p>Clients include Power to Change, Shaw Trust, Chance UK, UpRising, Co-operative College, Hampshire CVS, Good Neighbours Network.</p>

System	Provided by	Resold by	Notes on company
Salesforce	Salesforce	Emprisia	<p>Multi-Certified team, headed by partners with extensive not for profit Salesforce implementation experience, working on both large and small projects.</p> <p>They demonstrate early value with standard functionality to generate the fastest return on investment on the proven platform their clients have purchased. They empower their clients to leave them self-sufficient and in control by focussing on user adoption throughout the project lifecycle. Leading, managing and enabling business change at all levels.</p>
Salesforce (with Fonteva Membership)	Salesforce	Fonteva	<p>Fonteva is well-established in the USA as a Salesforce partner for associations, professional societies, and charities. It is now established in the UK.</p>
Salesforce	Salesforce	Giveclarity	<p>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 (Not for profit) and leading with one vertical (fundraising) distinguishes them from other Salesforce partners.</p>
Salesforce	Salesforce	Hyphen8	<p>Hyphen8 provides a complete range of consulting, application development and support services to UK based SME's and not for profit organisations of all shapes and sizes. Their services are based on developing powerful and tailored applications on Salesforce.com. Their solutions for not for profit organisations span a wide range of business needs - including grant making, fundraising, membership, income management, events, volunteer management, and more.</p>
Salesforce	Salesforce	Make Positive	<p>A Salesforce.org Premium consulting partner and Salesforce.com Platinum partner. Since becoming a Salesforce partner in 2009, they have focused on building propositions for the entire IT lifecycle.</p> <p>They help their customers become self-sufficient with Salesforce by identifying and implementing best practices for:</p> <ul style="list-style-type: none"> • Technical architecture • Project governance • Data management • User adoption • Change control

Notes on system	Illustrative charity/non-profit customers
<p>Salesforce is deemed as one of the most powerful and innovative CRM platforms and not for profit organisations are benefiting from these innovations through Salesforce.org's 1-1-1 model, which offers deep discounts on licences.</p> <p>Organisations have a wealth of options – from the fundamental building blocks the Non-Profit Success Pack offers, to the rich & intuitive user experience of Salesforce Lightning, to bringing to bear the power of Artificial Intelligence through Salesforce Einstein – all in respect to better understanding and serving their supporters and beneficiaries. Not for profit organisations can improve their fundraising, campaigning, volunteering, beneficiary services and support processes through the core platform and an ecosystem of 3rd-party 'apps' or plugins.</p>	<p>Gingerbread, Into Film, Education Support Partnership.</p>
<p>Fonteva has built Membership on Salesforce for use by associations and charities respectively.</p>	<p>BCACC (British Columbia Association of Clinical Counsellors), British Institute of Radiology, Creative Industries Federation, Mental Health Association in Tulsa, NASBA, National Head Start Association, NICSA, Royal College of General Practitioners, Royal College of Speech and Language Therapy, UK Finance, Watermark.</p>
<p>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.</p>	<p>Adoption UK, Christian Blind Mission, Compassion in World Farming, EveryChild, Fairtrade Foundation, Greenpeace International, Meningitis Trust, UNICEF UK.</p>
<p>Salesforce.com is recognised as the world's leading provider of cloud based CRM platform and applications. Through its foundation programme, it offers substantial discounts to not for profit organisations, and delivers a proven, highly secure, high performance platform for developing customised, integrated, highly flexible and scalable business applications in relatively short timescales.</p>	<p>UK Community Foundations, Barts Charity, Esmee Fairbairn, Robertson Trust, Laureus Sport for Good Foundation, Social Enterprise UK, Small Charities Coalition.</p>
<p>Salesforce can accelerate your mission and help you to work smarter with all of the tools you need to drive success in one place – campaign management, real-time analytics, web portals, team collaboration, mobile access, and the ability to build custom applications without having to code.</p> <p>The Non-profit Success Pack starts with a flexible, open data architecture and adds pre-built constituent and donor management components.</p>	<p>Survival, Kick it out, TeachFirst, Said Business School, C40 Cities, Pact, Institute for Research in Schools, Virgin Unite, We are Macmillan.</p>

System	Provided by	Resold by	Notes on company
Salesforce	Salesforce	Pracedo	<p>Pracedo is an award-winning Salesforce and Pardot consultancy based in London, serving the UK and Europe.</p> <p>Pracedo's Salesforce and Pardot consultants have the experience and deep product knowledge that comes from years of delivering diverse projects with customers ranging from one-person charities to large multinational NGOs.</p> <p>They were the first UK company to join the Pledge 1% programme where they give back 1% of their time, their profits and their product to not for profits.</p>
Salesforce	Salesforce	Silver Softworks	<p>Founded in 2015. Silver Softworks is a Silver Salesforce Consulting Partner and an Impact Partner. There is an experienced team of 8 consultants, multi-certified with more than 45 Salesforce accredited certifications. They have successfully completed over 220 projects with a customer satisfaction rating of 9.22 (out of 10) on the Salesforce AppExchange.</p>

Notes on system	Illustrative charity/non-profit customers
<p>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.</p>	<p>TeachFirst, American Express, Thames Valley Housing, Better Cotton Initiative, Homeless Link, University of Westminster.</p>
<p>Salesforce is the CRM system to over 32,000 charities and educational organisations globally. There are over 2,000 charities using Salesforce in the UK alone. It's a robust system that can provide the right solution now - and grow as an organisation's requirements change. The benefits are using an ultra-modern, cloud-based platform and the largest CRM provider that offers relevant solutions with the highest data integrity and security. Not for profit organisations can improve their fundraising, campaigning, volunteering, beneficiary services, membership, and support processes through the core platform (NPSP) and an ecosystem of 3rd party applications.</p>	<p>Prince's Teaching Institute, Marie Curie, Awards for Young Musicians, The Brilliant Cub, Brightside, Arts Connect, The Cart Shed, Sport Birmingham, A New Direction.</p>

CRM - open source solutions

System	Provided by	Resold by	Notes on company
Drupal and CiviCRM	Drupal and CiviCRM	Compucorp	Compucorp is a mid-sized digital agency based in Shoreditch, London that specialises in implementing CRM integrated website solutions for its clients based on the Drupal and CiviCRM platforms. Compucorp are a multidisciplinary team who are capable to work on both the creative digital elements of projects, alongside the process re-engineering work that a CRM project would require.
CiviCRM	CiviCRM	MillerTech	MillerTech (Miller Technology Ltd.) is a commercial organisation which has supplied membership and contact management (CRM) systems to the not for profit sector for approximately 30 years and which now contributes to the CiviCRM open source community and acts as implementation consultants.
CiviCRM	CiviCRM	Veda Consulting	Veda consulting provides consultancy and development services for not for profit businesses around CiviCRM. They provide services in all stages of project lifecycle from business analysis through to implementation and support. They are solely dedicated to the not for profit sector and have a strong understanding of the business needs in this arena. They regularly contribute to the CiviCRM community by developing and releasing extensions such as paperless direct debits, charities' online Gift Aid submission and Outlook plugin to record emails to CiviCRM.
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.

Notes on system	Illustrative charity/non-profit customers
<p>Drupal is a widely used open source CMS (content management system) developed and maintained by thousands of organisations worldwide. 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, not for profit and non-governmental groups.</p>	<p>Association of Teachers and Lecturers, Wikimedia UK, The Photographers' Gallery, Disability Rights UK, PSHE Association, The Arts Society, The Association for Science Education, The Tavistock Centre For Couples Relationships.</p>
<p>CiviCRM is a widely used web-based, open source CRM and fundraising solution. CiviCRM is designed specifically to meet the needs of not for profit organisations and has a very broad range of functionality as an off the shelf product. CiviCRM can also be easily and extensively customised to meet unique business processes.</p>	<p>CoramBAAF, British Humanist Association, Personal Support Unit, Chartered Institute of Linguists, Institute of Acoustics, Nutrition Society, EMDUK, Worshipful Company of Haberdashers, Worshipful Company of Management Consultants, Institute of Fundraising Technology, Advance the Union, Middle Temple.</p>
<p>CiviCRM is an open source software contact relationship management and fundraising solution. CiviCRM is web-based and is specifically built for the not for profit sector and comes with a vast number of functions that can be leveraged to help with donor engagement. Unlike closed source systems you do not have to pay any fees to turn on additional functionality and there is no licence fee. CiviCRM is created by an open source community coordinated by CiviCRM LLC.</p>	<p>Bloodwise (formally Leukaemia & Lymphoma Research), Royal Television Society, Time to Change.</p>
<p>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.</p>	<p>Visit England, Cells4Life, Affinity 4, athenahealth, Axxes, Bord lascaigh Mhara (BIM), Center on Asia and Globalisation (CAG), Hillel: The Foundation for Jewish Campus Life, CAP'TRONIC.</p>

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 charities and 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

Advice & Support	Process Improvement
Business Case Development	Programme and Project Management
CRM	Project Reviews
Data & Systems Security/GDPR	Software Specialisms
Information Systems Strategy	Supplier Management
Outsourcing	Virtual CIO/IT Director

CRM in a box

‘CRM in a box’ is the Adapta product that opens up to give you the very best expert guidance, insight and practical CRM know-how. Inside the box is a collection of project templates and other practical resources, together with vouchers for support from Adapta’s experts in not-for-profit CRM. All for an affordable fixed price to make sure your investment in CRM is a success.

CRM in a Box, includes:

- Full-day CRM workshop tailored to your organisation.
- CRM Toolkit – templates, analysis and example documents to support your CRM project.
- Navigating not for profit CRM – our very own expert guide to successful CRM in the not for profit sector.
- 20 hours of independent consultancy to help you through your project.

Adapta Consulting guides and publications

Adapta Consulting’s ‘Adaptive Approaches’ guides:

<http://www.adaptaconsulting.co.uk/adapta-guides>

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