

CRM in a modern membership organisation

11 December 2024

Agenda

✿ Introductions

✿ What we're going to cover:

✿ Market Knowledge

✿ Insight into Key Trends

✿ Organisational Readiness

✿ Open Q&A


✿ Summary and Close

Introductions



Mark Dendy

Keith Collins

- 
- We are a **specialist** information systems consultancy
 - We only work with **membership bodies**, charities, trusts and others in the not-for-profit sector
 - We are completely **supplier-independent**
 - Our consultants have held **senior** positions in a broad range of different organisations
 - Our advice and guidance is based on **practical experience** gained over many years

What we do





STATE OF THE MARKET



The future – sleek, modern CRM systems to **drive member engagement**

Arts & Culture

Charities

Membership



salesforce

Proprietary
solutions



m~hance
with you all the way

Formus Pro
Empower Impact Change

TES

WATTLE



kern Digital

ingentive
BUILT AROUND YOU

bluelight

smartimpact
Intelligent CRM solutions

ClearCourse



Giveclarity

SOLUTION
JUNKIES

Advanced
COMMUNITIES

slalom

VRP Consulting

hyphen8

CIRRICO
CLOUD TECHNOLOGY EXPERTS

ZENTSO™

Fonteva

GoodCRM

tessitura
NETWORK

access Charity CRM

donorflex10
on target

beacon

donorfy

SPEKTRIX

Raiser's Edge NXT™

Harlequin
Software

iMIS

oomi
CRM for Anyone Anywhere

m

READYMEMBERSHIP

HUBGEM

<compuco/>

VEDA
CONSULTING



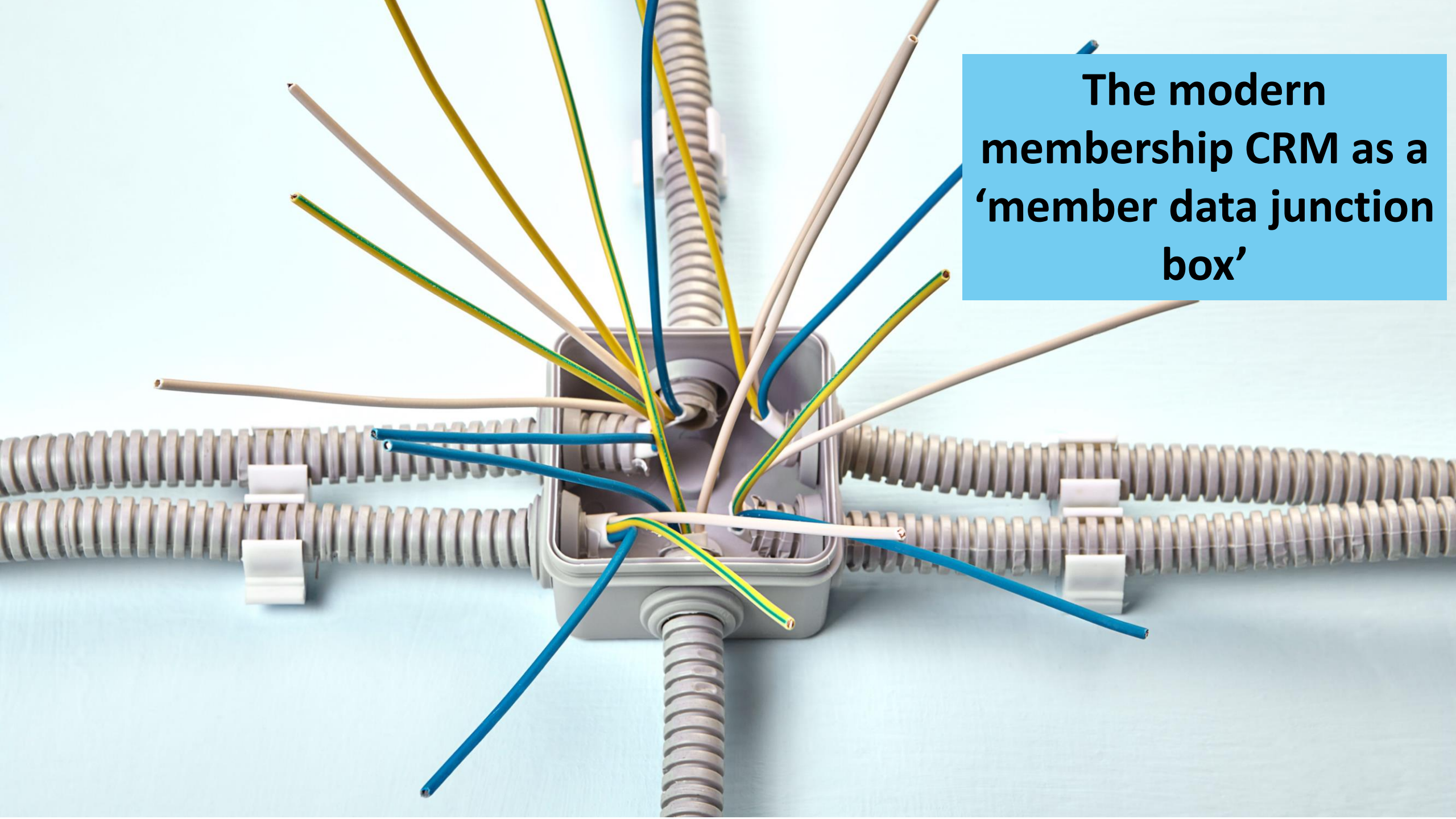




Product & IP?

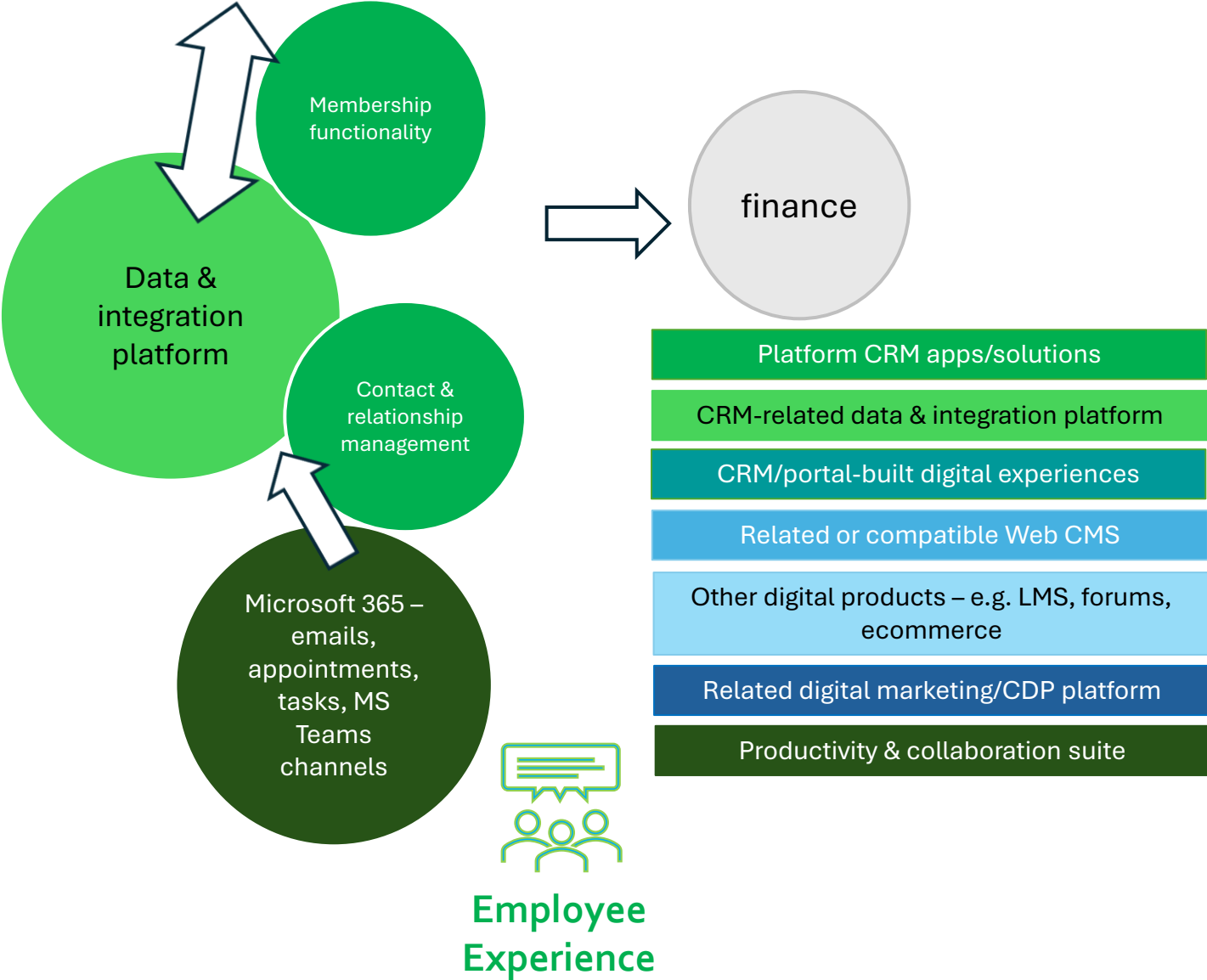
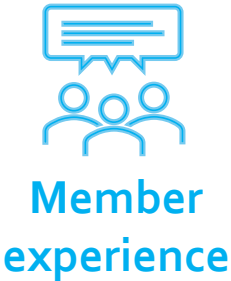


Killer acquisition?

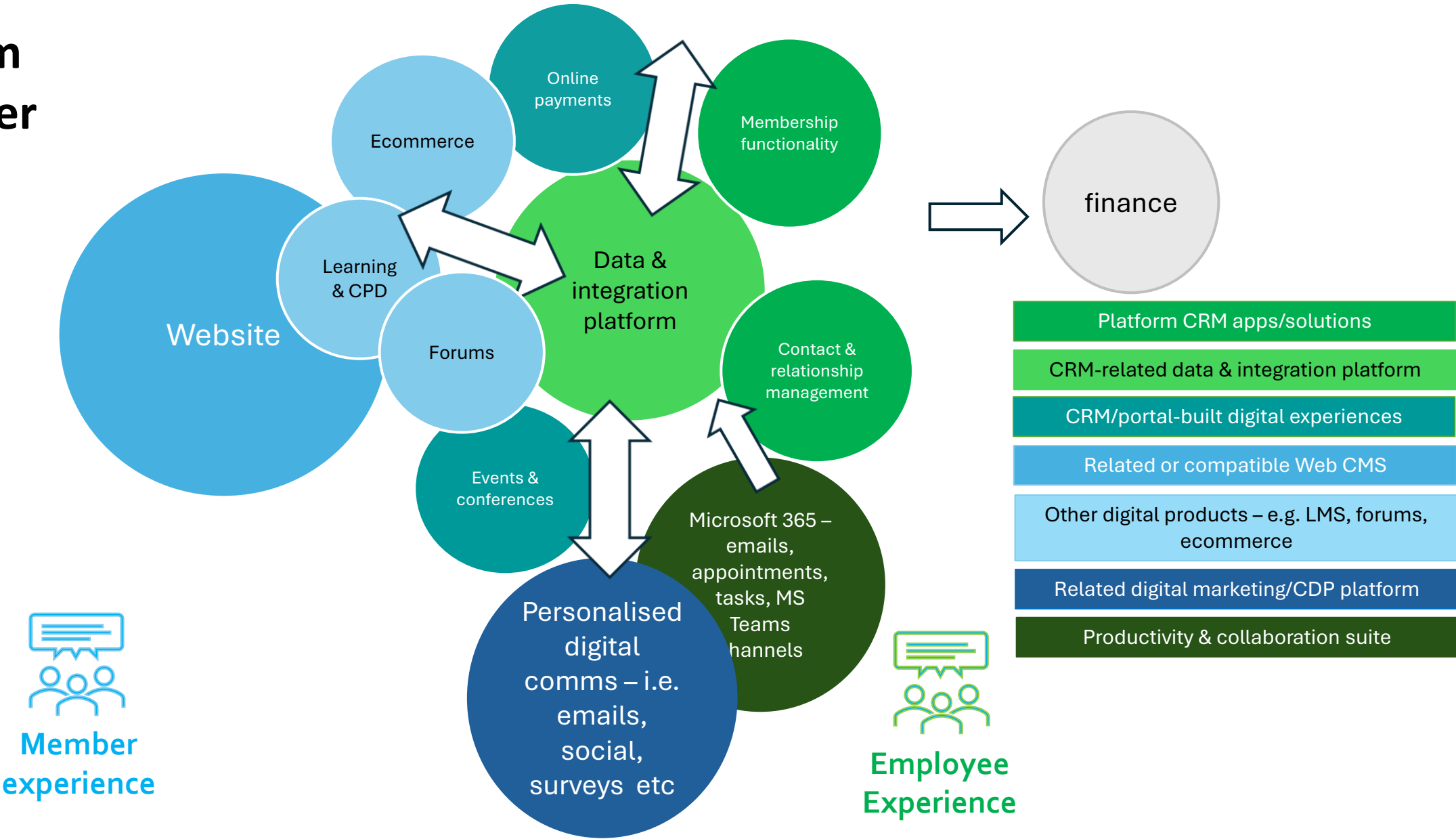


**The modern
membership CRM as a
'member data junction
box'**

A **possible**
DDaT
ecosystem
for member
bodies



A **possible**
DDaT
ecosystem
for member
bodies





Insights into Key Trends

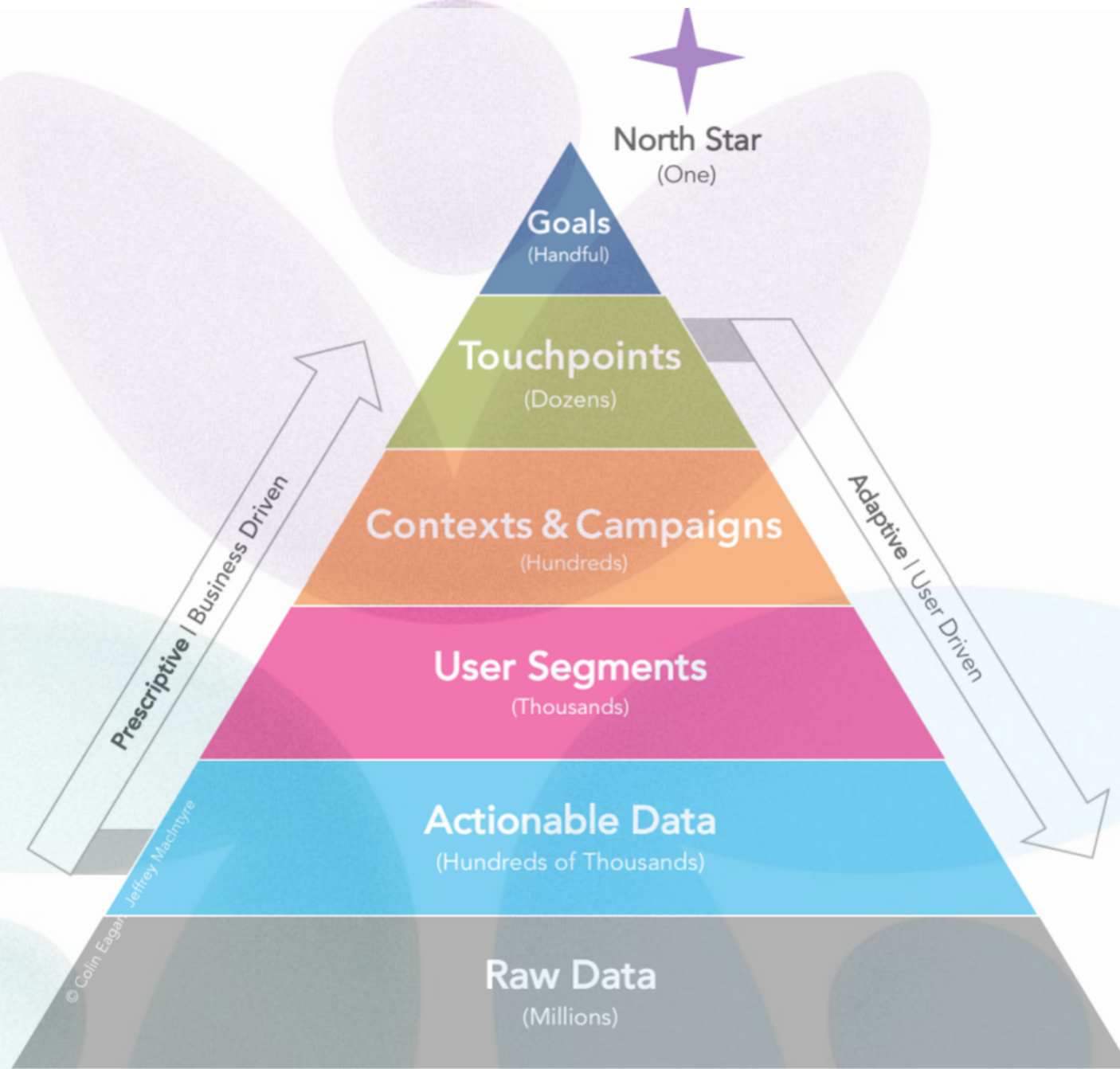
 **Personalisation**

 **Technology Integration**

 **Cloud First, Mobile Everything**

 **Data, Data, Data**

 **AI**



UX Personalization Pyramid







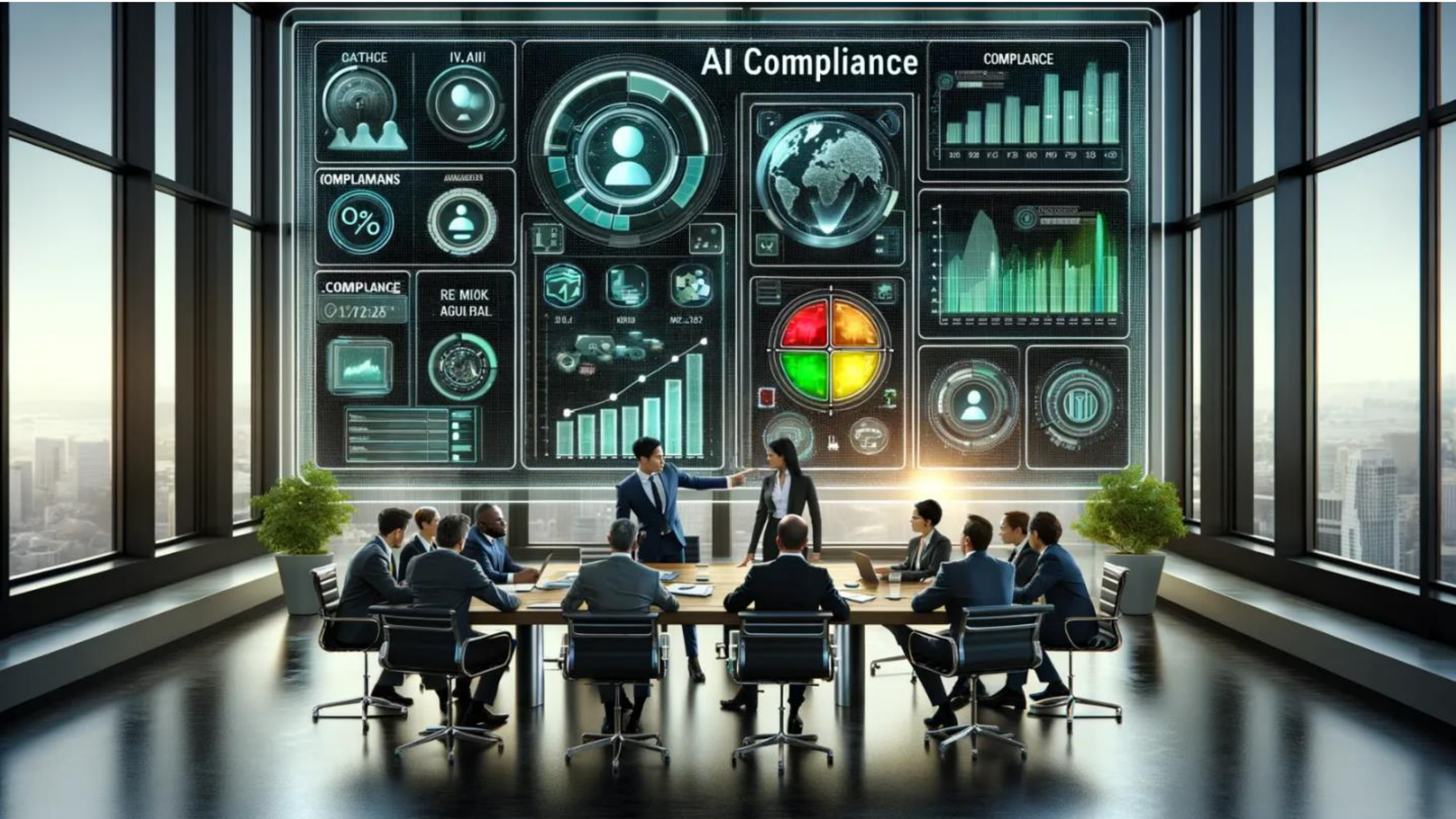
AI

Predict

Analyze

Organize

Collect



AI Compliance



Organisational Readiness

- ✿ Buy tech that has a long life
- ✿ Understand what peers are using – network!
- ✿ Who is thriving, who's barely surviving? What happened?
- ✿ Partners v suppliers





Some questions you've put to us
already...

Our next in-person event



Strategic AI opportunities for non-profits and cake

Thursday 27th February 2025 at 14:00 GMT

Royal College of Nursing , 20 Cavendish Square , London , W1G 0RN

📺 £0.00 👤 60

AI capabilities represent a major step forward for digital technology and will change how people think about and interact with AI. Much has been said about the future potential of generalised intelligence and associated risks. Adapta advise that Third Sector organisations should seriously consider today how AI could help support their mission operationally now and more strategically in the future.

[View Event ➞](#)

Event feedback

Please use the QR code to view and complete the online feedback form.



Thank you!



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