Nonprofits Are About People: The "R" in CRM

Constituent Relationship Management, or CRM, is a kind of software—a database, more precisely—to manage information. But CRM is more than that, too. At its best, it's a cultural change that can ensure your organization tracks and acts on the most current information about all of the relationships on which it depends. CRM is not just a way to store data—it's also a way to use that data to build relationships.

Think about everyone who interacts with your organization: program participants, donors, volunteers, partners, event attendees, legislators, followers, board members, vendors, consultants. The list goes on… in fact, you probably couldn't name them all if you tried. And you definitely couldn't remember personal details about each of them, their families, and every interaction they've had with your organization.

But no matter your mission, those people are the heart of your nonprofit and its work. How can you make them all feel not just known, but valued? How can you make them feel like they're in a kind of relationship with your organization—which, ideally, is exactly what they are?

Whatever your role, you want those relationships to thrive. But like all relationships, they require effort to maintain and grow. Relationships are built on shared histories and experiences, and on talking and listening to each other. CRM can make it possible to maintain relationships with hundreds or thousands, or even millions, of people.

Your ability to track and use information about them can have a profound impact on your ability to meet your mission—and the people who help you in those efforts, both within and outside your organization. CRM is not about technology or software or even data. CRM is about people.

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HOW CAN CRM BUILD AND MAINTAIN RELATIONSHIPS?

CRM platforms offer flexibility that allows nonprofits to use them differently to meet their particular needs. An arts organization might need to support membership tiers and event planning while an environmental advocacy organization might prioritize ways to engage supporters in online advocacy and tailored email communications.

Within each organization, people in different roles will also have different needs. To better understand the wide range of what's possible, consider the following examples of some of the most common nonprofit uses for CRM systems in building and maintaining relationships.

- Building Relationships With Supporters
- Making Donors Feel Valued
- Facilitating Staff Collaboration and Efficiency
- Reporting to Stakeholders and Funders
- Building Community

Notice that in each case, the CRM provides benefits for the people on both sides of the relationship, inside and outside the organization. In this article, we'll look a little more closely at each of these uses.

BUILDING RELATIONSHIPS WITH SUPPORTERS

Organizations of all kinds can benefit from cultivating their supporters' engagement. For example, a CRM used effectively can help advocacy organizations segment their emails to target advocacy actions to supporters and activists who care most about each issue.

It can scale to the more personal, such as helping a professional association identify members who are ripe to volunteer more to provide them with specially tailored opportunities—or allowing an arts education nonprofit to suggest classes that will most interest individual participants. It can also scale up—for example, letting a national student organization that wants to foster deeper levels of engagement with students across the country measure even offline actions.

In our research, we talked to organizations using CRM to build relationships in a wide variety of ways. Here are just a few…

A grassroots advocacy organization that covers a wide swath of issues related to reproductive freedom uses its CRM to better understand what types of issues interest supporters to more effectively motivate them to act in the future. As important as it is to share more information relevant to subscribers' interests, it's just as important to not send information that does not interest them. When supporters hear primarily about the issues they're interested in and the types of actions they're ready to take, they're more likely to respond. That means more petitions signed, more calls made to legislators, and more "people power" to help win campaigns.

An arts education organization relies on its CRM to let its small staff communicate more personally with constituents. The same constituent might take a semester-long painting class, sign her toddler up for a kids class, and buy tickets to her husband's dance performance—rather than bombard her with five newsletters from five different programs, staff can tailor each email to her interests. The result is that constituents are more likely to know about—and sign up for—the classes or performances they want.

An association focused on promoting leadership uses a points system to see how well it is providing value to members, assigning them points for every activity from attending a webinar to volunteering. When it found that a particular group was not engaging with the organization, it sent a personal invitation to join the planning committee for the annual meeting. The constituents re-engaged in a powerful way, resulting in a stronger long-term relationship with the association, and the organization gained insight into the content and programming that will better engage other members going forward.

MAKING DONORS FEEL VALUED

At its best, fundraising is a conversation; a connection between the organization's work and the things that a donor values. People are more likely to get out their checkbooks when they feel that an ask is personal to them, personal to their interests, and recognizes the value of their past support.

But when organizations begin to scale fundraising up to dozens, hundreds, or thousands of donor relationships, maintaining a personal touch becomes more challenging. How can you, as an individual or a small team, make each donor feels personally appreciated for their contributions?

Whether you're a major gift officer having conversations with individual donors or an email program manager soliciting donations by the thousands, you want to treat each donor as a person. Your CRM can make that job easier in many ways, including the following:

- Personalizing donation ask amounts based on donors' giving history.
- Easily reporting on donors' giving frequency to segment appeals.
- Targeting special asks at donors who are likely to convert, such as those who have given multiple times and might be ready to become sustainers, or those with the capacity to give more who could be cultivated in a major donor program.
- Mapping third-party data to help identify donors and prospects with high giving capacity.
- Automatically tracking a major donor's progress through moves management.
- Automating common but time-consuming tasks, such as reporting and thank-you letters.

But above all, a CRM gives you essential insight into how your supporters and donors interact with your organization. Whether they've taken online advocacy actions in the past, shown up at your annual gala year after year, or volunteered at last year's biggest event, every donor has some history with your organization. Your CRM can track that history and tell you each of the ways they've supported you and what issues and topics they care most about.

When you use your CRM data to make each ask personal, whether by personalized email or thanking them in a phone call, you give them the opportunity to do even more. By treating their support as a relationship rather than transaction, you create the opportunity for them to continue contributing to the things they care about in the ways that work best for them.

FACILITATING STAFF COLLABORATION AND EFFICIENCY

Relationships with donors and constituents are critical, but your most important relationships might be those among your staff members. Taking full advantage of your CRM's features can lighten their workload, facilitate collaboration, and reduce frustrations.

It can also help you automate certain tasks and functions. Not everything can or should be automated—tasks such as communicating with major donors or addressing helpdesk requests are best left to humans who can understand when context and nuance are needed—but such tasks as handing off new cases to teammates or notifying the right people about incoming grants can be easily automated to save time and effort.

Here's how some of the organizations we spoke to are using CRM to automate collaboration…

An association is using a ticketing system integrated with its CRM to create a "helpdesk" approach for all kinds of internal 'customer service' needs—everything from problems that need fixing to simple requests for information. If someone in any department needs the latest data on something, they put in a ticket and the analytics team addresses it, resulting in fewer emails, less time juggling incoming requests, and more efficiency in getting work done.

A legal aid organization matches constituents with pro-bono legal support with an easy-to-use intake system that generates each next step automatically, from tasks to review new cases to project assignment to follow-up tasks. This makes it easier to intake more clients with fewer staff, with almost no administrative time and improved collaboration. And because it's in the Cloud, it's accessible from anywhere.

An advocacy and grantmaking organization uses its CRM to facilitate communication between the development team and the grantmaking team, which needs to know what funds will be available for grantees and when. Automation makes sure everyone has the information they need. It's also used automation to streamline work within the development team—for instance, if they flag a donor's profile with a certain interest or need, the CRM will automatically set a task or reminder to follow up on it.

REPORTING TO STAKEHOLDERS AND FUNDERS

A well-configured CRM can make it easy to report on the key performance indicators that matter to your program staff, executive directors, board members, and funders, providing an essential big picture view of your organization's health. But if you're collecting a lot of data, it can be overwhelming to put it all together into a big picture.

Start simple. Identify what factors define your organization's success, such as dollars raised, constituents served, laws passed, or classes provided. You'll likely have several metrics reflecting the most important factors, which are the biggest indicators of your effectiveness. These are your key performance indicators—start with those.

Make sure you're collecting the data you need to get an accurate picture of those metrics, then track those metrics consistently. Set up reports or dashboards to share with your leadership team on a regular basis (monthly or quarterly, for example) to show performance.

Summary data alone can't tell the full story of your work. Investing even a little staff time in analyzing the data can give you a much deeper understanding of how you're doing, and will yield direct, actionable insights to improve your work. Investing in data analysis can have a massive impact on your performance. This might mean hiring data-focused staff, or training existing staff who work with CRM.

BUILDING COMMUNITY

We've shown how CRM provides opportunities for your organization to create more meaningful connections between staff and the people who participate in your programs. But it can also help your constituents feel more connected to each other.

For example, imagine a nonprofit that supports the families of children with epilepsy. With a CRM, it can offer easier ways for parents to register for workshops online or ask questions of a staff expert, reducing stress at a very stressful time in their lives and ensuring they can quickly and easily get the information that's most important for them.

But supporting a child with a serious disease is challenging—and it can be isolating. The organization could support these families more powerfully by helping them support each other with a CRM-driven online community. Families can ask each other questions directly, lend support, and share frustrations and encouragement with others who are going through the same experience.

Here are a few other ways the organizations we spoke to are using CRM to build communities…

A nonprofit in Baltimore uses its online community as part of its effort to connect talented, passionate individuals with local social impact organizations in need of skilled staff. As it provides training and resources to each cohort of 40-50 new fellows, its online community serves as an invaluable way for program staff to provide updates to fellows and for the fellows to connect with each other. The organization has focused on using its community to support its training opportunities, where it's important to foster useful discussion and keep resources organized and easily accessible. Unlike a listserv, where emails tend to get lost, users can always find what they're looking for.

An arts education organization uses its CRM to let students and program participants choose from the classes and communications that fit their interests. That might mean giving their best dance enthusiasts first dibs on registering for the newest dance class, or making it easy for them to sort through classes online and quickly register for their favorites. But it can also mean using students' interests to give them better offerings. For the first time, staff and instructors can look at all the classes a student takes and find opportunities for new classes.

A global grantmaker uses its CRM to collect detailed information from grant applicants, and after the grant's term, to look for thorough report-backs on the effectiveness. The CRM holds all of the information from each applicant, allowing staff to see all the data in one place when they communicate. And for grant applicants, the process is as streamlined and convenient as any grant process can be—they can come back to the same place each time with the same login and know exactly what they need to submit.

CONCLUSION

We often think about CRM technology as being "for fundraising" or "for marketing," but the truth is that CRM is about relationships—and relationships permeate every aspect of a nonprofits work, including program work. Building strong relationships with the constituents we serve is just as important, if not more so, than relationships with supporters and donors.

Using your CRM to support program work could be as simple as putting your application forms online, or as complex as building a custom portal to provide very specific and unique ways for your constituents to interact with you. The most important thing is to make sure that you're focusing on the people: what do your constituents want? What do they need? What will make their lives easier, and what will make them grateful to you for providing that crucial piece of support that they didn't know they needed?

Every organization is different, and not every organization runs the same types of constituent-focused programs. But don't forget about this important audience when you think about your CRM. Your program work—the work that achieves your mission—is all about creating thriving relationships with the people who need you.

ABOUT THIS ARTICLE

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