

Nonprofit CRM Decision Scorecard

SCORING SCALE: 1-5 (1 = NOT SUPPORTED; 3 = PARTIALLY MEETS; 5 = FULLY PROVEN)

Evaluation Criteria	Key Question	Weight (%)	Score (1-5)	Weighted Score
<p>Unified Data Model & Single Source of Truth</p> <p>Prevents data silos</p>	<p>Does the platform store all constituent data (donors, volunteers, event attendees, grants, etc.) in one centralized database with a single supporter profile?</p> <p><i>How to verify: In demo/sandbox, update a contact's info and confirm the change is instantly visible across all modules.</i></p>	20%		
<p>Cross-Module Workflows & Automation</p> <p>Saves staff time</p>	<p>Can the CRM automate processes across functional areas (e.g., an event signup triggering a donor follow-up)?</p> <p><i>How to verify: Ask for a demo a real scenario (e.g., event attendee to donor workflow).</i></p>	10%		
<p>In-Platform Communications (Email & SMS)</p> <p>Logs all interactions</p>	<p>Does the platform include built-in email marketing and SMS so you can communicate directly from the CRM?</p> <p><i>How to verify: Ask to show building an email/SMS campaign. Verify tracking of opens/clicks. Try creating a segmented list (e.g., LYBUNT) in sandbox.</i></p>	10%		
<p>Reporting</p> <p>Builds trust</p>	<p>Does the CRM provide robust reporting and dashboards for fundraising and program metrics that satisfy board and executive stakeholders?</p> <p><i>How to verify: Ask to create 2-3 must-have reports. Verify if reports can be scheduled/exported.</i></p>	10%		
<p>Contract Terms</p> <p>Avoids budget surprises</p>	<p>What is the full 3-5 year cost including licenses, fees, implementation, training, and support?</p> <p><i>How to verify: Create a cost comparison spreadsheet.</i></p>	7.5%		
<p>Customization & Flexibility</p> <p>Prevents from reverting to spreadsheets</p>	<p>Does the system allow you to configure fields and workflows without heavy IT help?</p> <p><i>How to verify: Add a custom field or automate a unique process in demo.</i></p>	7.5%		

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<p>Ease of Use & User Adoption</p> <p>Reduces learning curves and time spent on training</p>	<p>Is the CRM intuitive for all team members? Is there support for onboarding quickly?</p> <p><i>How to verify: Observe UI in demos. Have non-technical staff perform basic tasks in sandbox (e.g., enter a donation).</i></p>	7.5%		
<p>Vendor Track Record & Support</p> <p>Ensures full system utilization</p>	<p>What is the vendor's experience with nonprofits and what support is provided after implementation?</p> <p><i>How to verify: Ask for references of similar size. Review quality of training materials.</i></p>	7.5%		
<p>Time-to-Value & Implementation Timeline</p> <p>Builds team momentum</p>	<p>How quickly can the platform be implemented and delivering value? What is the typical go-live timeline?</p> <p><i>How to verify: Review a sample project plan. Look for migration tools.</i></p>	5%		
<p>Security, Permissions & Compliance</p> <p>Protects sensitive donor data</p>	<p>Does the CRM have strong security measures, granular permissions, and compliance?</p> <p><i>How to verify: Ask to show setting user roles. Request security documentations.</i></p>	5%		
<p>Integration & Extensibility</p> <p>Prevents duplicate data entry</p>	<p>Can the CRM integrate with other systems (accounting, website forms) and does it offer APIs?</p> <p><i>How to verify: Verify native integrations. Have IT advisor evaluate API documentation.</i></p>	5%		
<p>Scalability & Future-Proofing</p> <p>Switching systems is costly</p>	<p>Will the CRM scale with organization growth (donors, data) over the next 5-10 years?</p> <p><i>How to verify: Talk to a long-term customer about system performance over time.</i></p>	5%		

Red Flags & Disqualifiers to watch for

Red flags are indicators of a poor fit for a truly unified nonprofit CRM or represent significant hidden risks. Organizations are advised to proceed with caution when vetting any vendor showing the following signs:

- **Stitched-Together or Siloed Solutions:** Often called a "Franken-CRM," these systems are actually separate tools or databases bolted together. They hinder a nonprofit's success by creating data barriers and requiring constant data syncing or duplicate entries.
- **Lack of Native Functionality:** A major concern is if a vendor is missing core modules (such as volunteer management or event registration) and expects the organization to use third-party software for key tasks.
- **Export-Only Reporting:** If a CRM cannot produce reports internally and forces users to export data to Excel for analysis, it is considered an immature product that lacks the necessary insights, like dashboards.
- **Hidden or Escalating Costs:** Opaque pricing is a significant red flag. This includes low subscription fees that conceal massive upfront implementation costs, contracts with steep annual price hikes, or extra charges for basic features and additional contacts.
- **No Sandbox or Trial Environment:** Vendors unwilling to provide a hands-on trial may be hiding usability issues. Without a sandbox, an organization cannot validate workflows or reporting before signing a contract.
- **Unproven Support or References:** It is a disqualifying sign if a vendor cannot provide reference customers, if references mention frequent system outages or slow support, or if all referenceable clients are outside the nonprofit sector.
- **Security or Compliance Gaps:** Any indication that a vendor does not prioritize security, such as no encryption, no privacy policy, or a lack of role-based permissions, is a reason to remove them from consideration to protect constituent data.
- **Long Implementation or Lack of Support:** If a vendor's typical implementation exceeds 6 months or if they do not assist with data migration, it contradicts the goal of achieving quick value. Furthermore, a vendor's inability to commit to key milestones (like database migration) within the first 60–90 days is a red flag.
- **Technology Constraints:** If a solution is only offered on-premises without a cloud/SaaS option, it poses a risk for updates and uptime for organizations that lack dedicated IT staff.

Six-Week Decision Accelerator Roadmap

Week	Focus & Key Activities	Key Deliverables
Week 1 Project Kickoff & Requirements	<ul style="list-style-type: none"> Stakeholder Interviews Criteria Definition Vendor Shortlist Plan Demos 	<ul style="list-style-type: none"> Documented requirements from each team. A weighted scorecard template (evaluation rubric). Initial vendor shortlist (~5 vendors). Introductory demo meetings scheduled
Week 2 Initial Demos & Shortlisting	<ul style="list-style-type: none"> Vendor Demos Real-Time Scoring Debrief & Shortlist Vendor Communication 	<ul style="list-style-type: none"> Completed initial demo scorecards (rubric scores for each vendor). Decision on 2-3 finalist vendors to move forward. Scheduled in-depth demo sessions for Week 3. Sandbox/trial access credentials for each finalist. List of customer references for each finalist (with calls to be scheduled).
Week 3 Deep-Dive Demos/Workshops	<ul style="list-style-type: none"> Extended Demos Cross-Functional Involvement Detailed Q&A Follow-Up Prep 	<ul style="list-style-type: none"> Completed deep-dive demo scorecards List of follow-up questions/clarifications for each vendor. Sandbox/trial access for hands-on testing. Reference call appointments scheduled with 2+ current customers for each finalist.
Week 4 Hands-On Testing & References	<ul style="list-style-type: none"> Trial account/Sandbox Testing Reference Calls Team Debrief 	<ul style="list-style-type: none"> Trial testing reports. Reference call notes for each finalist. Updated evaluation scorecards if necessary Decision on whether all finalists proceed to Week 5 or if one is dropped due to red flags.
Week 5 Validation of Implementation, Security & TCO	<ul style="list-style-type: none"> Implementation Plan Review Security & Compliance Total Cost of Ownership (TCO) 	<ul style="list-style-type: none"> Implementation plan overview for each finalist. Security review summary for each finalist. TCO comparison. Updated scorecards or decision matrix incorporating any new information from implementation and security reviews.
Week 6 Final Decision & Buy-In	<ul style="list-style-type: none"> Selection Meeting Executive/Board Approval Change Management 	<ul style="list-style-type: none"> Final decision matrix or weighted scorecard on record, showing the finalist rankings and scores. Final presentation for executives/board. Executive/board approval. Signed contract with the selected vendor. Scheduled kickoff with vendor's implementation team.