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Title: 3 Tips for Successful Fundraising Software Selection and Implementation

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Buying new fundraising software is not something you'd want to do every year. It can be stressful to implement a new package, and of course, it is a significant financial commitment, too. The selection process itself can be long-winded, and timetables are often readjusted when it becomes clear that the process won't run along the smooth, predictable lines you hoped for.

Little wonder then that charities considering such a project often revert to behaviors that, in their minds, reduce the risk of it all going horribly wrong. But having observed more than 200 fundraising software implementations, I have seen what makes it successful — and some of it may be counterintuitive. Here are three tips for success.

1. Remember you're choosing a partner at least as much as you're choosing a product

It's tempting to try to boil the selection down to an objective set of "Yes"/"No" answers to product-related questions. That makes it easier to compare the results, right? Wrong. You're not going to learn much about the vendor that way. Why is the vendor important? Because technology and product features come and go over time, so you need a vendor that is going to be able to work alongside your organization for years to come.

So find out (don't just ask them) whether the vendor has a track record for keeping its customers for a long time. Listen to what others in the sector say about it. Check out how financially viable it is. Your objective is to find the vendor that you believe can become a long-term, trusted advisor — not just the one that gives the best sales pitch.

2. Don't try to fix the price, scope and timetable

Fundraising software is a major investment, so it's understandable that the charity might want to tie a vendor down to cost, scope and timetable to retain control. Be wary of any vendor that allows that to happen. Why? Because basic project management theory shows that if you fix all three, you are simply increasing the chance of failure.

For example, if you fix scope, then the time (and therefore cost) will have to be variable in case of any unforeseen issues that crop up mid-project. Or if you simply have to fix the "go live" date to hit a specific deadline, you're going to have to be flexible on the scope, maybe sacrificing some requirements until a later date.

It is best then to find a vendor who you believe can be a trusted advisor, obtain the best estimates for time and cost according to the scope you need to cover, and monitor the project closely. Besides, fixed price quotes often include a contingency that you would not have to pay if you were being charged only on the time delivered to the project. Running projects with controlled flexibility leads to less long-term expenses, less stress and certainly less risk.

3. Don't expect new fundraising software to change the culture of your organization

It may represent a new era in your organization, especially if it means multiple departments using the same database at last, but it's only software. The task of making sure everyone uses it comes down to you. You need to manage expectations, run training courses and prepare your colleagues for the new system. The vendor can help — and is sometimes useful since it doesn't have any "history" — but ultimately, you have to manage the process.

The central theme behind all of these tips is to make your vendor your partner. Partnership is better than constant confrontation and mistrust, and is a lot more enjoyable.