



Schultz & Williams

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Navigating the Waters Between Vendors and Nonprofits

Presented by:

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Vendors know the product

Nonprofits know the organization



Know Thyself!

- NP: Define your needs

Must Haves:

Online Donation

E-mail Collection/

Dissemination

Tell-A-Friend

Near Future:

Event Registration

Customized donation
pages

Future Future:

Database Integration

E-mail Segmentation

Member's only area

- Create a staged plan that is flexible, so that you don't overbuy and can make adjustments if money needs to be diverted
- Get Executive Director and Board buy-in

- Vendor: Understand what kind of client you want and would serve best



Assess Your Infrastructure

- NP: Do you have the staff to implement the product?
 - Who will be in charge of the implementation, managing the product and training the staff?
 - Tech person is good for installation; direct marketer good for managing the product.

Do you have the hardware and software?

Do you have the vision and plan to fully take advantage of what you are buying?
- Vendor: Do you have the staff to provide the level of customer service the organization needs?
 - Planning, Busy Seasons, clients who need regular—if not daily—contact



Be Honest

- NP: Know where your organization is right now
 - Staffing
 - Infrastructure
 - Time commitment
 - Capital campaign
 - Strategic Planning
 - Reorganization
- Vendor: Staged approach allows for more satisfied customers
 - Realistic time frames
 - What the product does *now*
 - Notify clients at the beginning of a problem—they might be able to help you
 - Give options to upgrade: an organization may not need it now but they might at a later date



Contracts

- NP: Hidden Costs: Understand what the vendor is asking in terms of:
 - Hardware
 - Software licenses
 - Software
 - E-mail storage
 - Staffing
 - E-mail deployment costs
 - Training
 - Training Costs
 - Time frames
 - Upgrades

Look for places that you can negotiate; ask for flexibility.

Ask about upgrade costs, increases in licensing and maintenance fees.

- Vendor: Consider flexibility—if no other client has asked for it before, it doesn't mean it can't be done.
Know your limits and what kind of clients you serve best.



Project Management

Appoint a project manager who will:

- Clearly define system requirements
- Manage expectations
- Manage the schedule—both internally and externally
- Alert management of cost overrun issues
- Hold regular status meetings for the project—both internally and externally
- Document process



Return on Investment

- Assess how long it will take to recoup your investment
- Decide what you want out of your e-mail list: volume, activists, donors
- Include added staff time (and vice versa, saved staff time because of upgrades)



Don't buy into the hype

- This is not a 'get rich quick' scheme!
- Direct mail is not 'dead'
- E-mail is still the best way to drive results online
- Text messaging hasn't arrived here yet
- Social networks (Facebook, etc.) are not raising significant money online and they are difficult to maintain and manage



Be Realistic

- A great technology vendor can only take you so far
- Without promotion, marketing and solid communication, you'll never increase your online exposure, revenue, e-mail file
- Benchmark yourself against *like* organizations—service area, sector, budget, staffing size, location



Bigger isn't always better

- Look at all systems—both the large ones and the small ones—so you can determine what fits your organization and your budget at your current time.
- Look for a firm that you can grow with over the next five years.
- Consider a stand-alone e-mail system and a stand-alone donation system if you have a small base.
- Test a vendor with a smaller project first, if possible.



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Tech Vendors Can...

- Provide expertise and experience
- Push you to test, take risks and go beyond your comfort zone
- Keep you focused and on track
- Come up with creative solutions for your problem using their product
- Provide industry standards; industry-wide testing outcomes and benchmarks



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Tech Vendors Can't...

- Run the system for you
- Make up for mediocre staffing
- Create a marketing plan for you
- Know your constituents
- Navigate internal organizational issues



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COMMUNICATE!



Resources

Beth's Blog (<http://beth.typepad.com>): how non-profits can use social media

Frogloop (www.frogloop.com): Care2's nonprofit communication and marketing blog

Idealware (www.idealware.org): reviews and information about nonprofit software

Gifts In Kind (www.giftsinkind.org): product philanthropy

Techsoup (www.techsoup.org): information, resources and support as well as access to donated and discounted technology products

Taproot (www.taprootfoundation.org): grants of professional services

Your community foundation

For more information...



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