



Hands-Free Fundraising

Donor management systems reaching for the cloud and user ease

By JAY LESLIE

Donor management system providers are starting to support mobile devices and cloud computing, one of several recent market trends that are adding value and capability to the software. Users are demanding it.

The providers are also enhancing functionality that's critical for nonprofits, such as integrated email and ease of use, in many cases adding substantial functionality without raising prices. This is good news for organizations looking to buy or replace a donor management system. There's less reason than ever to consider building your own system when you can buy a relatively feature-rich one prepackaged for less than \$500, on the low end.

It might even be possible to save money by moving from a more traditional, expensive system to a less expensive one that is better tailored to your particular needs.

What are the fastest-moving trends in the donor management world? Here are a few to keep an eye on:

- **Mobile Computing.** As mobile devices become both more popular and more powerful, vendors are optimizing donor management systems to support access from tablet computer and smartphone Web

browsers. A few offer specialized applications, or "apps," that facilitate use from mobile devices. The access allows fundraisers or directors to gather information about prospects or even enter notes or gifts from the road. Many of the vendors that have not yet addressed this trend have stated their intention to do so in the near future.

- **Hosted/Remote Access.** Vendors are also designing systems to accommodate Web accessibility, often called cloud computing, Software as a Service (SaaS) or Application Service Provision (ASP). Users can work from virtually any computer, and because it's hosted rather than installed, vendors handle set-up and maintenance, reducing strain on IT staff. Most of the leading systems now offer hosted solutions, even some that have traditionally been only available as installed packages.

- **Email.** The presence of any email functionality at all in a donor management system was noteworthy in 2009, but this year's crop of systems shows a significant shift toward strong email support. The more advanced broadcast email capabilities allow fundraisers to easily send formatted emails personalized to each donor, and to track who opens and clicks-through on each email.

Some vendors have built their own

functionality into their systems, but the general trend is to integrate with existing services like Constant Contact and VerticalResponse.

- **CRM Convergence.** There used to be a clear distinction between specialist donor management systems and Constituent Relationship Management systems (CRMs), which allow organizations to track many different kinds of constituents in addition to donors. That line has blurred noticeably as these types of systems converge.

More and more donor management systems include stronger features for managing other types of constituents, and general-purpose CRMs are starting to include specialized donor management functionality. The result is a greater selection of software that can be used across whole organizations rather than only for specific departments.

- **Access to External Data.** Vendors are enabling systems with the ability to easily integrate additional data about donors – for instance, to pull in wealth-screening information that lets users see who's likely to be major donor prospects. Many vendors are also exploring the possibility of pulling social media information into their systems as well. Though most have not gotten very far down this path

yet, there's a clear shift in this direction.

- **User Experience.** Form usually follows function with software, but as information technology becomes mainstream, vendors are recognizing the value of a positive user experience. In addition to power, donor management systems are beginning to offer more flexible, aesthetically pleasing user interfaces.

Most now let users rearrange screen elements, rename data fields or hide those they use infrequently, create "dashboards" of the tasks and information most valuable to them, and customize software workflows to better match how work is done in their organizations. Many systems even let individual users customize their own settings.

- **Reporting.** Finally, reporting capability has become much stronger field-wide during the past two years. The ability to include charts and graphs in reports is quickly becoming the standard rather than a bonus, as is support for adding favorite reports to dashboards to provide quick, critical information on a per role – and sometimes per user – basis.

These are the trends, and changes in user expectations are shaping them. As technology becomes more advanced, it's also more mainstream. Staff members no

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longer consider an Excel spreadsheet a sufficient development database. Organizations are more likely to recognize the benefit of investing in software that helps staff do their jobs, and vendors are competing for an expanded market by improving their offerings.

As the systems get better, organizations are more likely to upgrade their existing systems to benefit from new features. A

nonprofit with development staff members who work remotely might be enticed by a new system with increased support for smartphones, or one that lets staff work as effectively from their home office or hotel business center as from an office.

The changing demographics of senior nonprofit management might also be changing expectations. Executive directors of the past might have asked development staff to print donor reports, but

today's computer-savvy managers might prefer customizable dashboard views of this data. As donor management systems converge with CRMs, it becomes less likely that organizations will need separate volunteer, vendor and member management systems. A dashboard could provide a view of data from across the organization in a single place.

The current trends in donor management systems raise exciting possibilities

for organizations, whether they're considering their first system or an upgrade. As the newest systems on the market distinguish themselves from prior offerings, there are more and better choices than ever. *NPT*

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FUTURE TRENDS

Best guesses for the next generation software

As vendors respond to the popularity of mobile devices and cloud computing by shifting from device-specific applications to browser-based systems, next-generation donor management systems will become more practical for tablet personal computer (PC) use. Aside from portability, this also means some conveniences currently available only on mobile devices could gain broader use — such as Google Voice, for example.

Google Voice responds to a user's verbal cues with appropriate actions. For a donor management system, this might mean being able to tell a tablet PC to “send thank you letter to the Gates Foundation.” A wizard might help the user create and email the letter hands-free, shrinking the functionality gap between tablets and laptops.

But with the rise of cloud computing comes new obstacles. With traditional installed software, users log on to their machines or network and access all their files. Cloud storage is less user-friendly. For example, to attach a photo stored in Picasa Web and a contract stored at Box.net to a volunteer record stored in a cloud-based donor management system, a user might need three sets of user names and passwords.

Some companies are addressing this problem of credentials proliferation by providing a single sign-on for cloud-based resources -- one username and password logs users into multiple applications and storage services. Other systems, such as Salesforce, now allow users to access cloud-based files through a single Google Apps login, even though the two systems exist in separate clouds. Additional solutions are likely just around the corner.

More and more vendors are moving systems to the cloud, where users are going. Features like these will go a long way toward making these next generation cloud-based donor management systems as familiar and convenient as traditional installed software packages. -- *Jay Leslie*

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