



DonorDrive®

# How to Select the Right Digital Fundraising Solution

# Introduction

Investing in new digital fundraising solutions can be intimidating, but sticking with systems that aren't working for your organization, your team, and your supporters could be leaving you with a higher cost. Consider the long-term benefits of shedding tech debt, improving supporter experiences, and refocusing your team to activities that increase fundraising revenue.

*What is the status quo truly costing you?*

## Current State of Fundraising

Fundraising organizations are challenged to grow revenue like never before despite years of stagnated growth, a shrinking pool of supporters, and an increasingly competitive landscape.

<b>-0.7%</b>	<b>▼7%</b>	<b>1.4%</b>
Although giving grew in dollars, total giving remained flat, with -0.7% growth after adjusting for inflation.	The number of donors fell by 7% in the first half of 2022 compared with the first half of 2021.	Growth has slowed to an annual rate of 1.4% over the past 20 years for the 1.5 million 501(c)3 organizations in the U.S.

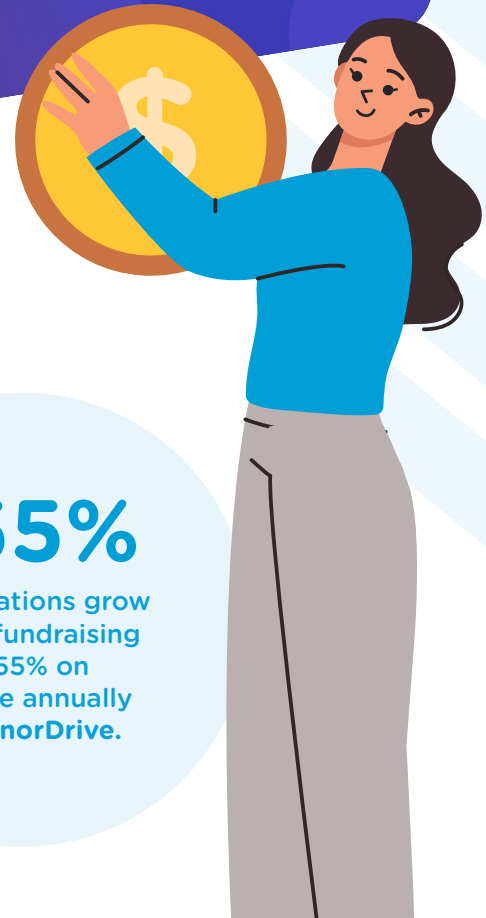
Sources: Giving USA 2022, Chronicle of Philanthropy, Zippia

## The Bright Side

Many fundraising organizations are seeing growth, and most have one thing in common: They've invested in technology to remove friction and pave the way for increased revenue.

## Common Challenges

- Stale donor pools
- Stifled fundraising program innovation
- Expensive maintenance and tech debt in fundraising programs
- Sub-par supporter experiences



**↑ 55%**

Organizations grow digital fundraising by 55% on average annually on DonorDrive.



## What to Expect in the Pages Ahead

We created this guide to remove the intimidation factor that comes along with any major system change. In the next few pages, we'll walk through these crucial steps to investing in a new digital fundraising solution.

### → Change Evaluation

How do you know it's time to make a change?

### → Defining Priorities

How do you gather feedback from key stakeholders and prioritize your requirements?

### → Solution Evaluation

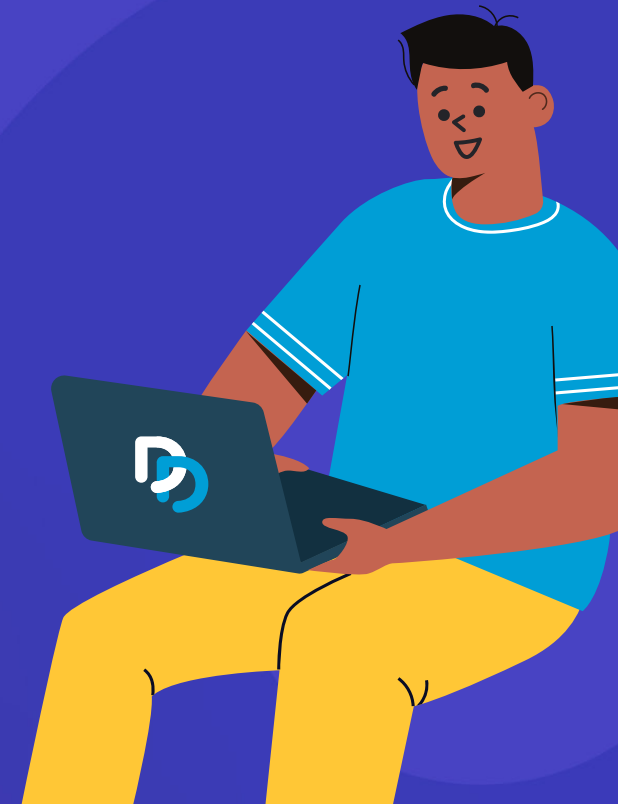
What should you ask potential solution partners, and how do you get the most out of demos?

### → Decision

How do you confidently go into the future once you've chosen a new solution?



# Change Evaluation



## Ask Yourself These 3 Questions

Making significant changes to your technology and processes isn't easy. It takes time, commitment, and investment. But the cost of not changing can often be higher. An uninspiring donor pipeline, employee turnover, and stagnated growth are all signs it's time to make the switch.

### 1. Do your supporters complain about your digital experience?

Your donors and fundraisers will let you know if your sites are difficult to navigate — if not with words, then with actions. To find any weak spots in your crucial fundraising processes, take the time to look at your data, but also make an effort to really listen to your supporters.

- **High number of zero dollar fundraisers** — If your peer-to-peer fundraisers aren't reaching their goals — or worse, not trying at all — it could be because you aren't giving them the tools they need to be successful.
- **Support requests** — If your fundraisers need constant support to find your event, register, donate, customize a fundraising page, and take other crucial steps, look no further. Your digital fundraising platform should make these actions simple.
- **Ask for feedback** — Poll your supporters and talk to volunteer committees, team captains, and participant base. But most importantly, you should be prepared to respond to feedback with action.



## 2. Does your staff spend valuable time maintaining your fundraising sites?

Your technology should work with you — not against you. If your development team spends time on administrative tasks in your digital fundraising platform instead of stewarding supporters, that's definitely a red flag.

- **Reporting issues** — Your fundraising staff should be able to access meaningful reports that quickly update them on the progress of their events and campaigns, top supporters, and year-over-year benchmarking. These reports should help your team make data-driven decisions to optimize your efforts.
- **Time to launch** — Launching new events or campaigns shouldn't take months to complete. Whether you host a 200-event national walk series or want to create a dedicated donation campaign for social media, technology shouldn't delay fundraising results.



### 3. Does your tech support your organization's overall growth?

As your organization matures, it's not uncommon for your team to outgrow existing technology. Not only should you have the capacity to manage larger pools of supporters, create new campaigns, and integrate your systems, but your digital fundraising partner should lead the way for new opportunities.

- **Disconnected systems** — If you operate in many systems that don't connect, you're missing out on a full view of your supporter. If a supporter makes a donation, attends an event, and has the capacity to make a major gift, you want to be able to steward that supporter appropriately. Your solutions should have opportunities to integrate with your favorite tools with pre-built connections and open and secure APIs.
- **No flexibility to innovate** — If your strategy expands to include social media integrations, digital wallet, mobile fundraising, livestreaming, and activity tracking, your digital fundraising platform should support those same goals.



↑ 133%

In the past two years, livestream fundraising has increased 133% on DonorDrive, and fundraisers who stream on DonorDrive raise 102% more on average than those who don't.

**HOT  
TIP!**

#### Leadership Buy-in

- **Collect data** to show how your digital fundraising software is costing you.
- **Find a champion** who is in the room where decisions happen.
- **Be a sales person** and identify the pain points your leaders care about.
- **Think long term** and consider your 5- to 10-year growth plans.



# Real Results from Cure SMA



## Before DonorDrive



## With DonorDrive

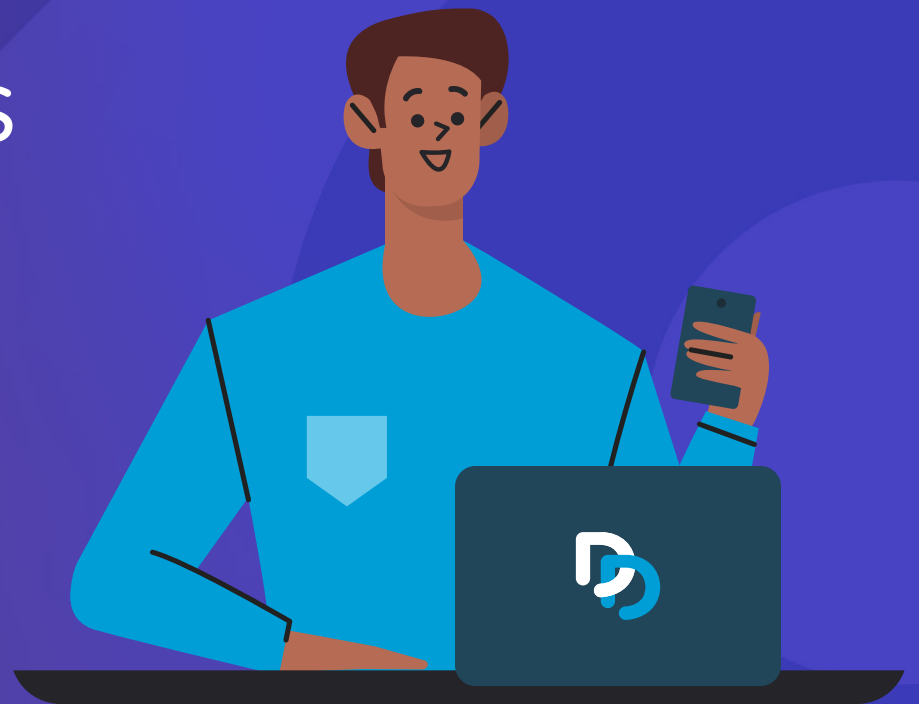
Difficult user experience results in 83% of fundraisers raising \$0	Improved user experience triples the number of active fundraisers from 17% to 62%
Development team spends 15-20% of their time on administrative tasks	With easily accessible reports, staff focuses on stewarding supporters
Staff spends 90 minutes setting up each event site with HTML expertise needed	One team member easily sets up each event site in 15 minutes with clicks, not code
All-in-one system causes significant tech debt	Best-in-class integrated solutions — DonorDrive for Salesforce Nonprofit Success Pack — save Cure SMA \$150,000 over five-year contract

With goals to grow fundraising revenue by 35%, Cure SMA needed to invest in a new digital fundraising solution — focused on supporter engagement, retention, and data integrity for both individual giving and peer-to-peer programs.





# Defining Priorities



Once you decide it's the right time to make a change — and you have leadership buy-in — bring your team together to align on what you need from your solution, your goals, and your game plan to make it happen.

## Consider This

**Stakeholder Expectations** — What do your donors, fundraisers, and staff need to be successful? Collect feedback from those who interact with your digital fundraising solution — both internally and externally. Take stock of your current processes and gaps where you could be doing better.

**Reporting Capabilities** — What analytics do you need to be successful? Consider how data drives your success and ability to optimize your campaigns.

**Technical Requirements** — What IT requirements, customizations, and integrations do you need to plan for? Engage your IT and operations teams early on to make sure you're including their dealbreakers in your must-haves.



**Training and Support** — What are the technical abilities of your staff and stakeholders? How much time do you have to train? What are key times you'll need support — think about special events? All technology has a learning curve. Ongoing training and support is crucial to your success long term.

**Current and Future Goals** — How will your projected growth impact your digital fundraising needs? Think not just about what you need today, but your projected volume 5, 10 years down the road. A solution that can grow with you will meet your needs today, but also help propel you into the future.

**Timeline** — When do you want to be up and running? Be realistic about your timeline, but set key milestones based on your team’s fundraising goals and activities.

**Budget** — What’s your annual technology budget? What will implementing a new digital fundraising software cost? Evaluate your setup costs, hiring consultants, and maybe even investing in full-time staff to manage not just the transition but to ensure your success moving forward.

### Expected Timeline

- 1-4 WEEKS  
Defining priorities
- 4-12 WEEKS  
Solution evaluation
- 1-4 WEEKS  
Contract negotiations
- 4-16 WEEKS  
Implementation
- Pave the way to higher revenues

**HOT TIP!**

### Team Leader

Identify who will lead your selection committee early on to avoid confusion and keep the project on time. Project management prowess is a must, but also consider capacity and how this project fits into your team leader’s overall job description.





# Create a Selection Committee

Guarantee your success by getting buy-in from all stakeholders who will interact with the software — those who will directly work within the platform and those who will support it.

Easier said than done, right? Internal barriers often exist between development, marketing, IT, operations, and finance teams. But when it comes to digital fundraising technology, each of these groups has an important role and should have a stake in choosing the right solution.

**Break down silos between teams by nominating a representative from every audience that will interact with your digital fundraising platform.**

Include representation from external groups by identifying staff, fundraisers, and volunteers to help test out the system and provide input. Once you've made a selection, this group could also form your implementation committee.

## Who to Include:

- Team Leader
- Development
- Marketing
- IT
- Operations
- Finance
- Volunteer
- Fundraiser



## To Do List

- Identify decision-makers
- Nominate a project lead and selection committee
- Define current processes
- Point out gaps
- Illustrate your ideal state
- Understand your stakeholder's tech capabilities — think about both staff and supporters
- Prioritize wishlists
- Consider your overall tech stack and how digital fundraising fits in
- Tie back to your overall growth goals — and budget accordingly

# Solution Evaluation



Once your team has a clear understanding of your requirements, it's time to start looking at solutions. Many digital fundraising solutions exist in today's market with a wide variety of functionality and cost. Once you have your must haves ironed out, focus on solutions that prioritize what's most important to your organization.



## Prep for Demo Day

Product demonstrations give you the opportunity to see how a solution really works and are key to any technology search. Get the most out of your demos with these tips:

- **Share your list of requirements** with the potential partner beforehand, so they can tailor your conversation.
- Don't go in cold. **Send your team resources** from the potential partner prior to the demo to avoid questions that could already be answered.
- **Press record** on the demo to review later and share with other stakeholders.
- **See how things really work** with a live demonstration (not just slides and screenshots).
- **Write down your questions** in advance for a more tailored demo.
- **Focus on your requirements.** Don't allow potential partners to gloss over your needs. Ask to come back to your requirement list if things go too far off track.
- **Open up the opportunity to be impressed.** There may be features you haven't considered. Give the potential partner the time to show off what sets them apart.





## How to Narrow Your Search

- Reference review sites like [G2](#)
- Research what high-performing organizations use for their digital fundraising software
- Attend industry events and conferences
- Review potential solution websites
- Sign up for webinars
- Read case studies, guides, and blogs
- Get on the phone with potential solutions and start asking questions

## Grill Your Potential Partners

Focus on the priorities your team defined and what matters most to your organization. Compile questions in advance for further alignment from your team and be prepared to ask lots of meaty questions.

Here are just a few examples of the types of questions you should be asking (*and the kind of answers you should be getting*):

### Company / Product Overview

#### What's your uptime record over the last 12 months?

DonorDrive has 99.9% uptime with auto-scaling to adapt to load and continuous deployment with no gap windows.

#### What are your support hours?

DonorDrive's support team is available by live chat, email, and phone Monday through Friday, 8:30 am to 5:30 pm EST. We also have emergency support available for those times when an issue arises outside of business hours.

#### Is there an additional cost or limit on support tickets?

DonorDrive's unlimited support is included in all client contracts.



## Reporting / Data Integrity

### What reporting capabilities do you have available?

DonorDrive's Event Insights tool gives fundraising staff access to high-level reports for individual campaigns. Our robust reporting functionality allows your team to go deeper, gaining access to participant, donor, event, and campaign data across all events and campaigns.

### What's your process for avoiding duplicate record creation?

Email address serves as the unique identifier for DonorDrive constituents and cannot be replicated within the system.

### Can we create admin groups to limit what team members can access?

DonorDrive administrators have the ability to limit the checkpoints available for other users, including access to events and campaigns, reports, and other functions.

## Communication / Coaching

### What kinds of communication tools are available within your platform?

DonorDrive gives your admins the ability to automate communications with Triggered Notifications and Scheduled Messages. The communication types include emails, Achievement Badges, text messages, and social media posts.

### Do you allow for marketing automation with triggered campaigns?

In addition to basic donation receipting, DonorDrive has advanced Triggered Notification functionality to engage participants and notify admins of key supporter actions. Examples include automated messages to \$0 fundraisers, emails to admins when donations of \$1,000 or more are made, and notifying event participants when they receive donations.

### Can we schedule messages to donors and participants?

DonorDrive allows admins to schedule messages to participants for additional coaching and to recurring donors for stewardship purposes.



## Fundraising

### Do fundraisers have the option to login to manage their fundraising page? What actions can they take?

In the DonorDrive Fundraiser Portal, event participants and DIY fundraisers can personalize their fundraising page including the message on their page as well as imagery. They can also connect to social media, send donor solicitations to contacts, view donation activity, customize Fundraising Milestones and Donor Incentives, connect a livestream, and track wellness activity if enabled.

### What kinds of DIY fundraiser functionality do you have? For example, can supporters create tribute and memorial personal fundraising sites?

DonorDrive's Personal Campaigns allow anyone to create their own individual fundraising page to accept donations and create awareness on behalf of your organization for a specific cause. Many DonorDrive clients use personal campaigns for tribute and memorial, special events like birthdays and anniversaries, corporate fundraising, and more.

### What gamification opportunities do you have, including achievement badges and other incentives to encourage fundraising?

DonorDrive gamifies the fundraising experience with teams, leaderboards, Achievement Badges, Fundraising Milestones, and Donor Incentives.

### What additional features do you have available? Activity tracking, livestream fundraising integration, etc.

DonorDrive fundraisers can log activity or sync directly from wellness apps in their fundraiser portal. They can also connect a livestream to their fundraising page or encourage donations from livestreaming sites like Twitch.





## Transaction Processing

### What payment options do you accept, including credit card types, ACH, and digital wallet?

DonorDrive accepts all major credit cards, ACH, Venmo, Apple Pay, Amazon Pay, and PayPal.

### What frequencies are available for recurring giving?

On DonorDrive, donors can make one-time, monthly, or annual donations.

### What currencies are accepted?

In DonorDrive, organizations can accept donations in more than 130 currencies. This allows donors to give in their currency without having to pay conversion fees through their banking institution.

## To Do List

- Narrow down to a few top solution options (no more than three)
- Ask detailed questions based on your list of priorities
- Sit down for demos with potential partners
- Collect case studies and references from real clients
- Continue to get input and buy-in from your stakeholders
- Fill out a scorecard to compare your top options



Decision



Once you've evaluated potential solutions and found a partner that hits the mark, you're almost ready to sign on the dotted line. You want to enter into a new phase with confidence, internal buy-in, and a clear vision for where you're going. **Take these steps to ensure your decision is the right one:**

- **Hear from real clients** — Ask to speak to current clients, check review sites, attend webinars and events where clients present with the partner, and read case studies with real quotes and data-driven results.
- **Get buy-in from key stakeholders** — We can't say it enough. Engaging these folks in the process means shared buy-in on your new solution and alignment moving forward.
- **Build a strong relationship with your partner** — Treat your rep as a guide in this journey. They should be invested in your success, provide key expertise for your industry — not just their solution — and help shepherd you not just through the buying process but ensure a smooth transition into implementation.



**HOT TIP!**

## Implementation Prep

Get ahead of the game by answering these key questions before you start meeting with your new partner:

- **What are your major goals for this year and beyond?**
- **Who will be part of your implementation team?**
- **What kinds of events and campaigns will you host this year?**
- **What have been your biggest obstacles in the past?**
- **What's on your wishlist?**

# Get Started Today!

Ready to find the best digital fundraising solution for your team?

**WE'RE HERE TO HELP!**

DonorDrive's enterprise digital fundraising solution helps organizations like yours crush supporter acquisition goals, boost stewardship and engagement, and level up mission impact. Get ready to create meaningful supporter experiences with peer-to-peer fundraising events, tailored giving campaigns, native mobile app, activity tracking, and livestream fundraising.

**DonorDrive<sup>®</sup>**