

TECHNOLOGY STRATEGY

CRM **Selection** Guide for NGOs

Choosing and Implementing the Right Constituent Relationship Management System for Not-for-Profit Organisations in NZ & Australia

Version 1.0

| 2025

| AmplifyData.org.nz

Needs Assessment

Platform Comparison

Vendor Evaluation

Cost Analysis

Data Migration

Implementation

Change Management

Published by AmplifyData.org.nz • Contact@AmplifyData.org.nz

Table of Contents

A comprehensive 16-section guide from needs assessment through implementation

01 Introduction to CRM for NGOs
Why CRM matters & the NZ/AU landscape

02 Understanding CRM Systems
Terminology, components & deployment

03 Assessing Your CRM Needs
Readiness, current state & requirements

04 Types of CRM Solutions
Nonprofit-specific vs general, by size

05 Key Features for NGOs
Essential feature checklist & comparison

06 Popular CRM Platforms
Beacon, Salesforce, Blackbaud & more

07 Vendor Evaluation Framework
Scoring template & reference checks

08 Cost Analysis & Budgeting
TCO calculator & ROI framework

09 Data Migration Planning
Pre-migration, phases & data mapping

10 Implementation Best Practices
Phased methodology & team structure

11 Change Management & Training
Adoption strategies & user training

12 Integration Requirements
Connecting your technology ecosystem

13 Data Security & Privacy
NZ/AU compliance & best practices

14 Common Pitfalls
What to avoid & how to succeed

15 Selection Checklists
Ready-to-use templates & worksheets

16 Resources & Further Reading
NZ/AU sector resources

Introduction to CRM for NGOs

Why CRM matters and the current NZ/AU nonprofit CRM landscape



What is a CRM?

A Constituent Relationship Management (CRM) system is the central hub for managing all your organisation's relationships — with donors, volunteers, beneficiaries, members, partners, and other stakeholders.

For NGOs, a CRM enables:

- **Donor retention and growth** through personalised engagement
- **Volunteer coordination** and relationship building
- **Programme delivery tracking** and outcome measurement
- **Fundraising efficiency** through automated workflows
- **Data-driven decision making** across the organisation

The NZ/AU NGO CRM Landscape

10-15%

Advanced
Integrated CRM with
automation

25-35%

Established
Dedicated CRM, basic
tracking

30-40%

Developing
Basic database +
spreadsheets

15-25%

Nascent
Spreadsheet-based only

Consequences of Poor CRM Capability

- Donor attrition from impersonal engagement
- Missed opportunities from poor follow-up
- Inefficient operations consuming staff time
- Inability to demonstrate impact effectively
- Compliance risks from poor data management

Understanding CRM Systems

Key terminology, components and deployment models

CRM Terminology

TERM	DEFINITION	NGO CONTEXT
Constituent	Any person or organisation in your database	Donors, volunteers, beneficiaries, members
Opportunity	A potential donation or funding	Major gift prospect, grant application
Campaign	A coordinated fundraising effort	Annual appeal, capital campaign, event
Segment	A subset of your database	Monthly donors, event attendees, lapsed donors
Workflow	Automated sequence of actions	Thank you email series, renewal reminders
Pipeline	Visual representation of opportunities	Major gift pipeline, grant pipeline

Cloud vs On-Premise

FACTOR	CLOUD-BASED	ON-PREMISE
Hosting	Vendor's servers	Your servers
Cost Model	Subscription (monthly/annual)	Upfront license + maintenance
Maintenance	Vendor handles updates	Your IT responsibility
Accessibility	Anywhere with internet	Office network or VPN
Scalability	Easy to scale up/down	Requires infrastructure investment
Best For	Most NGOs	Large orgs with IT capacity

Recommendation: Cloud-based CRM for most NGOs

- Ideal for organisations with limited IT resources and distributed/remote teams
- Predictable costs and easy scaling
- Vendor handles security, backups and updates

Assessing Your CRM Needs

Organisational readiness, current state analysis and requirements gathering



Organisational Readiness Assessment

CRM Readiness Assessment (Rate 1-5 each)

Leadership & Governance

- Executive sponsor identified and committed
- Board understands and supports investment
- Clear ownership of CRM project assigned
- Budget allocation approved or in progress
- Timeline expectations realistic

Current State

- We know where all our data currently lives
- Data quality is reasonable (minimal duplicates, current info)
- Current processes are documented
- Pain points clearly identified
- Staff capacity available for implementation

Future State

- Clear vision of what we want CRM to achieve
- Specific outcomes and metrics defined
- Integration needs understood
- Growth plans considered

Score Interpretation (Total /100)

- **80-100:** Ready to proceed with selection
- **60-79:** Address gaps before proceeding
- **40-59:** Significant preparation needed
- **<40:** Not ready — address fundamentals first

CRM Requirements Template

Essential Requirements (Must Have)

Contact Management

- Individual and organisation records with custom fields
- Relationship tracking and communication history
- Duplicate detection, merge, import/export
- Tags, segments and search/filter

Donation Management

- Gift entry (one-time, recurring, pledges)
- Multiple payment methods and campaign tracking
- Receipt/tax letter generation and soft credits

Communications

- Email integration with open/click tracking
- Letter/mail merge and template management
- Opt-out/consent management

Reporting

- Standard donation and donor lifecycle reports
- Custom report builder and dashboards
- Export to Excel/CSV and scheduled reports

Types of CRM Solutions

Nonprofit-specific vs general CRM, and size-based recommendations

Nonprofit-Specific vs General CRM

Nonprofit-Specific CRM

- Built for charitable organisations
- Donation tracking and tax receipting built in
- Nonprofit pricing models
- Support staff understand nonprofit needs
- Easier to implement and use
- **Best for:** Small–medium NGOs
- *Examples: Beacon (NZ), Bloomerang, Little Green Light*

General CRM (Nonprofit Config)

- Highly flexible and customisable
- Extensive ecosystem of add-ons
- Scales to very large organisations
- Strong integration capabilities
- Steeper learning curve, higher TCO
- **Best for:** Medium–large NGOs
- *Examples: Salesforce NP, MS Dynamics 365*

Size-Based Recommendations

Micro (1–5 staff, <\$500K)

Beacon (~\$50/mo), Little Green Light (~\$50/mo), Bloomerang (~\$99/mo). Ease of use critical.

Small (6–20 staff, \$500K–\$2M)

Beacon Pro, Bloomerang, Salesforce NP (10 free licenses), Blackbaud eTapestry.

Medium (21–100, \$2M–\$10M)

Salesforce NP Cloud, Blackbaud Raiser's Edge NXT, MS Dynamics 365. Implementation partner recommended.

Large (100+, >\$10M)

Salesforce Enterprise, Blackbaud CRM, MS Dynamics 365. Enterprise-grade security, complex automation.

Key Features & Popular Platforms

Feature comparison matrix and platform overviews for NZ/AU NGOs



Feature Comparison Matrix

FEATURE	BEACON	SALESFORCE NP	BLOOMERANG	ETAPESTRY	LITTLE GREEN LIGHT
Donation Tracking	Good	Good	Excellent	Excellent	Good
Email Marketing	Basic	Via add-on	Built-in	Built-in	Via integration
Reporting	Good	Excellent	Good	Good	Basic
Automation	Basic	Excellent	Basic	Basic	Basic
Customisation	Basic	Excellent	Basic	Basic	Limited
Ease of Use	Excellent	Basic	Excellent	Good	Excellent
NZ/AU Focus	Excellent	Basic	Basic	Basic	Basic

Platform Overviews

Beacon (New Zealand)

Best for: Small-medium NZ NGOs Pricing: ~\$50-\$100+/mo Implementation: 2-8 weeks

Strengths: NZ-developed with local support, GST and NZ charity compliance built-in, simple intuitive interface, good value, NZ payment gateway integration.

Limitations: Less customisable than enterprise options, limited advanced automation, smaller integration ecosystem.

Salesforce Nonprofit Cloud

Best for: Medium-large NGOs Pricing: 10 FREE licenses + ~\$48/user/mo Implementation: 2-6 months

Strengths: Highly customisable, extensive ecosystem, scales from small to very large, strong community, continuous innovation.

Limitations: Steep learning curve, requires implementation investment, add-ons add up quickly, needs technical admin.

Blackbaud (eTapestry / Raiser's Edge NXT)

Best for: Fundraising-focused NGOs eTapestry: ~\$100–300/mo | RE NXT: \$5k–\$20k+/yr

Strengths: Purpose-built for fundraising, strong donor analytics, prospect research tools, Australian office and support.

Limitations: Higher cost, dated interface (NXT modernising), complex for small organisations, vendor lock-in concerns.

Quick Comparison Summary

PLATFORM	BEST FOR	PRICE POINT	COMPLEXITY
Beacon	Small NZ NGOs	\$–\$\$	Low
Bloomerang	Small, retention-focused	\$\$	Low
Little Green Light	Micro/small	\$	Very Low
Salesforce NP	Medium–Large	\$\$–\$\$\$	High
Raiser's Edge NXT	Medium–Large	\$\$\$–\$\$\$\$	High
HubSpot	Marketing-focus	Free–\$\$\$\$	Medium

Price: \$ = <\$100/mo, \$\$ = \$100–500/mo, \$\$\$ = \$500–2000/mo, \$\$\$\$ = >\$2000/mo

Vendor Evaluation Framework

Scoring template, key questions and reference check guide

Vendor Scoring Categories

CATEGORY	WEIGHT	KEY CRITERIA
Functionality	30%	Meets requirements, ease of use, reporting, automation, customisation
Integration	15%	Email, accounting, online giving, API availability
Vendor Stability	15%	Years in business, financial stability, nonprofit focus, community size
Support & Service	15%	Hours, channels, documentation, training, NZ/AU presence
Cost	15%	Subscription, implementation, training, hidden costs
Implementation	10%	Timeline, data migration support, change management

Key Questions to Ask Vendors

Product & Pricing

- Can we see a demo with our specific scenarios?
- What features are included vs additional cost?
- What is your product roadmap for 1–2 years?
- What is total cost including all users we need?
- Are there nonprofit discounts available?
- What happens to our data if we cancel?

Support & Security

- Do you have support in our time zone?
- What channels are available (phone, chat, email)?
- Where is data hosted? (NZ/AU privacy important)
- What security certifications do you hold?
- What is your uptime guarantee?
- Do you integrate with our specific systems?

Reference Check Template

Questions for Vendor References

- How does your organisation compare to ours? How long have you been using the CRM?
- Did implementation stay on timeline and budget? What would you do differently?
- What do your staff like most/least? How is the learning curve?
- How is vendor support? Have you had issues? How were they resolved?
- Has the CRM delivered on expectations? What results can you share?
- **Would you choose this CRM again? What advice would you give us?**

Cost Analysis & Budgeting

Total cost of ownership, budget guidelines and ROI framework

Typical Costs by Organisation Size

ORGANISATION SIZE	YEAR 1 TOTAL	ONGOING ANNUAL	RECOMMENDED % OF BUDGET
Small (<\$500K, <5 staff)	\$2,000 – \$8,000	\$1,000 – \$3,000	1-2%
Medium (\$500K-\$2M, 5-20 staff)	\$8,000 – \$30,000	\$3,000 – \$15,000	1-2%
Large (\$2M-\$10M, 20-100 staff)	\$30,000 – \$100,000+	\$15,000 – \$50,000	1-1.5%

Year 1 Budget Allocation

CATEGORY	TYPICAL % OF BUDGET
Software subscription	25-40%
Implementation/configuration	20-35%
Data migration	10-20%
Training	15-25%
Internal time/project management	10-20%
Contingency	10-15%

Hidden Costs to Remember

- Annual price increases (budget 3-5% annually)
- Additional users as organisation grows
- Add-on modules activated later
- Integration maintenance
- Data cleanup before migration
- Staff turnover and retraining
- Customisation requests post-implementation

ROI Framework

Quantifiable Benefits

- Time saved on data entry and reporting
- Automated acknowledgements
- Reduced duplicate mailings
- Improved donor retention
- Recovered lapsed donors
- Better major gift identification

Qualitative Benefits

- Better donor relationships
- Improved staff satisfaction
- Better decision-making from data
- Reduced risk from single points of failure
- Improved compliance and governance
- Foundation for future growth

Data Migration & Implementation

Migration phases, data mapping and phased implementation methodology

Data Migration Phases

- 1 Discovery & Planning (2–3 weeks)**
Complete data inventory, document current model, map source to target fields, define quality standards and success criteria.
- 2 Data Preparation (2–4 weeks)**
Export from source systems, clean and standardise data, merge duplicates, transform formats, backup original data.
- 3 Test Migration (1–2 weeks)**
Migrate test data to sandbox, validate record counts and accuracy, test relationships, document issues, refine process.
- 4 Production Migration (1–2 weeks)**
Final data export (freeze point), execute production migration, perform data accuracy checks, obtain sign-off.
- 5 Validation & Go-Live (1 week)**
Comprehensive validation, user acceptance testing, parallel running, go-live decision, decommission old systems.

Pre-Migration Data Cleanup

Data Cleanup Tasks

- Identify and merge duplicates
- Remove deceased (with appropriate records kept)
- Update addresses (run against postal database)
- Verify email addresses
- Standardise data formats (dates, phone numbers)
- Fill in missing critical fields where possible
- Remove truly obsolete records
- Document any data transformation rules

Implementation Phases

PHASE	TIMELINE	KEY DELIVERABLES
1. Foundation	Weeks 1-4	Project plan, configured sandbox, user permissions, data migration plan
2. Build	Weeks 5-8	Fully configured system, migrated test data, working integrations, training materials
3. Test & Train	Weeks 9-11	Validated system, trained users, process documentation, go-live plan
4. Go-Live	Week 12	Live system in production, resolved initial issues, stable operations
5. Optimise	Weeks 13+	Optimised processes, enhanced capabilities, measured outcomes

Change Management & Common Pitfalls

Driving adoption, training strategies and avoiding common mistakes

1

Change Management Essentials

Before Go-Live

- Communicate the "why" early and often
- Involve key users in design and testing
- Identify and empower CRM champions
- Address fears and resistance openly
- Develop role-specific training plans

After Go-Live

- Provide hypercare support (first 2–4 weeks)
- Celebrate early wins and share success stories
- Monitor adoption metrics and address gaps
- Offer follow-up training sessions
- Continuously improve based on user feedback

Common CRM Pitfalls to Avoid

Top 10 CRM Implementation Mistakes

1. **No executive sponsor:** Ensure senior leadership is visibly committed
2. **Skipping needs assessment:** Document requirements before evaluating platforms
3. **Choosing on price alone:** Cheapest option may cost more in the long run (TCO)
4. **Trying to replicate the old system:** Use the opportunity to improve processes
5. **Underestimating data migration:** Budget adequate time and resources for cleanup
6. **Insufficient training:** Invest in role-specific, hands-on training
7. **No change management:** People change is harder than technology change
8. **Implementing everything at once:** Phase your rollout for manageability
9. **Ignoring data quality:** "Garbage in, garbage out" — clean data before migrating
10. **No ongoing ownership:** Assign a CRM administrator for ongoing maintenance

Data Security & Privacy (NZ/AU)

Key Privacy Considerations

- **NZ Privacy Act 2020:** Ensure CRM complies with Information Privacy Principles
- **AU Privacy Act 1988:** Australian Privacy Principles apply to personal data
- **Data hosting location:** Confirm where data is stored (important for sovereignty)
- **Consent management:** CRM must support opt-in/opt-out tracking
- **Breach notification:** Both NZ and AU require mandatory breach reporting
- **Access controls:** Role-based permissions to limit data access appropriately

Selection Checklists & Resources

Ready-to-use templates, worksheets and further reading

1

CRM Selection Process Checklist

Complete CRM Selection Process

Phase 1: Prepare

- Complete organisational readiness assessment
- Document current state and pain points
- Define requirements (essential, important, nice-to-have)
- Establish budget parameters
- Form selection committee

Phase 2: Evaluate

- Research potential platforms (longlist of 5–8)
- Shortlist to 2–3 based on initial review
- Request demos with your specific scenarios
- Complete vendor evaluation scorecards
- Conduct reference checks
- Calculate total cost of ownership for each

Phase 3: Decide

- Compare final options on all criteria
- Present recommendation to decision makers
- Negotiate contract terms
- Obtain board/leadership approval if needed
- Sign contract and begin implementation planning

Total Cost of Ownership Worksheet

5-YEAR CRM TOTAL COST OF OWNERSHIP

Year 1 Costs:

Subscription/License Fees: \$_____

Implementation/Configuration: \$_____

Data Migration Services: \$_____

Training Costs: \$_____

Internal Staff Time: \$_____

Contingency (10–15%): \$_____

TOTAL YEAR 1: \$_____

Ongoing Annual Costs (Years 2–5):

Subscription + Add-ons: \$_____

Support & Maintenance: \$_____

Ongoing Training: \$_____

Internal Administration: \$_____

TOTAL ANNUAL (Years 2–5): \$_____

5-YEAR TOTAL: \$_____

Resources & Further Reading

NZ/AU Sector Resources

- Beacon CRM: beaconcrm.org (NZ-developed)
- Salesforce.org Nonprofit Cloud
- Blackbaud Asia-Pacific
- Connecting Up (AU nonprofit tech support)
- NTEN (Nonprofit Technology Enterprise Network)

Privacy & Compliance

- NZ Office of the Privacy Commissioner: privacy.org.nz
- AU OAIC: oaic.gov.au
- Charities Services NZ: charities.govt.nz
- ACNC: acnc.gov.au
- Digital.govt.nz (NZ Government digital guidance)

This guide is provided as a general resource. Pricing and features are indicative and may change. Always verify current information directly with vendors and consult with appropriate technology advisors for your specific requirements.