

Database Speed-dating Session

Goals for the Day

- Learn about different sources
 - o Databases
 - o Online resources
 - o Other organizations with similar needs/issues
- Determine best options for needs
 - o Needs assessment documents on website
- Maximize time/efficiency/targets
- Learn about what is current
 - o Best practices
 - o New systems
- Move away from Excel (more efficient tracking)
- Integrate with website
 - o Online and mobile giving

WILD APRICOT Feedback

- Working to keep up with demands and needs needed improvement
- Membership levels need expansion
- Awkward to integrate their system with current site (better to use their website)
- Limited to one website and one account
- Quick response rate
- Great for organizations who are at the point of building website, etc
- Specifically for nonprofits

SUMAC Feedback

- Don't have an email template, but can do broadcasts through Sumac
- Merge documents can be challenging, but figured out through their training
- No online forums to help those who like to figure things out on their own (must call in most of the time)
- Discount through TechSoup
- Prompt with responses for help
- Great training videos online

SALESFORCE Feedback

- Not very responsive (unless they think they can sell you something)
- Forums are great to get answers
- Email system easy to use (will show open/click rate)
- Click + Pledge app → replaced by PayPal
- Many add-ons (personalize, but also difficult at onset and perhaps confusing for users)

Conclusions

- There is a great need in this area, and the community is responding
- Budget is an issue
- Donation software being discontinued for some people, so they need a quick go-to system
- There is no perfect database
- Brand new organization starting from scratch can learn a great deal from databases
- Groups need to access their work flow in order to understand what is really needed