CONSIDERING A PLATFORM CHANGE?

P2P Platform Evaluation Checklist

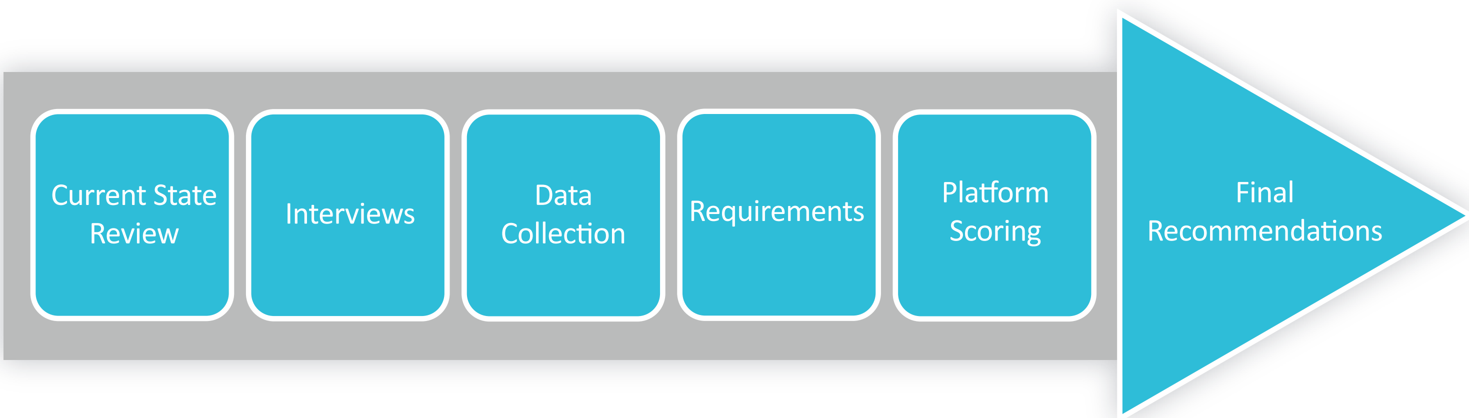
When it comes to fundraising platforms, a tremendous amount of great new technology is available to support the growth of your programs, increase engagement with your constituents and even improve efficiencies across your organization. Many organizations may be asking if it is time to consider making a change.

Before making an investment in this area it is important to first understand and document your goals and business needs. This will ensure you know what opportunities and gaps exist with your current platform.

Mapping business processes, inventorying and understanding dependencies across your digital ecosystem, and performing a company-wide risk assessment will enable your organization to determine what are true “needs” vs. “wants” and map those to the available functionality of the prospective platforms.

Methodology

Charity Dynamics has a simple six-step methodology to guide you through the process.



The first four steps all contribute to the creation of your needs assessment or technology audit. This stage consists of identifying the current and future goals of an organization, the types and amounts of information technology the organization uses, and the strengths and weaknesses within the organization's current systems infrastructure and the changes required to meet the business objectives and goals.

Current State Review

An organization's goals usually target both internal excellence and results related to the organization's bottom line.

In this step, we organize the documentation by breaking down the various types of technology you use into individual categories. A simple example of this could include:

Awareness	Website	Data Management	Engagement	Interaction	Measurement
Marketing & CMN	**Programs**	**CRM**	**Coaching & Stewardship**	**Conversion Funnels**	**Finance & Accounting**
Social	Annual & Sustainers	Data Collection	Acknowledgment & Recognition	Registration	Data Analytics
Paid Media	P2P Fundraising	Audience Segmentation	Advocacy	Donation	Google Analytics & Google Tag Manager
Earned Media	Events	Personalization & Conditional Content Delivery	Transaction Processing	Information	UX
Owned Media	Volunteer Engagement		Email & Text Campaigns	Feedback	Media Monitoring
	Advocacy		Membership Management	Call Center	
	Memberships			Event Management	
	Education			Internal Communication	
	Services & Support			Community Logins	
	Donor Relations				

Interviews: Who to Involve

Your fundraising platform is one (critical) component connected to your larger technical infrastructure, meaning it needs to work in concert with other systems and processes, for example your constituent relationship management solution (CRM) and accounting system. It also provides a public interface with your constituents.

So, to start, consider forming a working group of stakeholders from across your organization to help you gather information as well as participate in the vetting process for your potential solution. It is important to select a strong project lead. Consider an independent third party who is able to see the interconnectivity across departments and can remain unbiased, such as a certified project manager, or technical auditor.

If you are not able to create a cross-functional working group, consider publishing the results internally to allow for feedback or identification of additional requirements. This also provides a checkpoint to gain stakeholder buy-in before moving on to the next step.

Data Collection & Requirements Gathering

Remember that each stakeholder has a unique view of what may be a "need" vs. a "want". Some may have a strong technology background and others may not. Your project lead can help translate business needs into technical requirements by asking questions about the following:

1. **CRM System**
   a. Integration with the CRM (and all other connected systems)
   b. Ability of proposed solutions to capture all of the required data fields and ease of adding or modifying to suit
   c. Ease of accessing, updating or modifying constituent records
   d. Streamlined data synchronization or easy API to connect with the organization's constituent database and/or finance software

2. **Participant Engagement**
   a. Native event fundraising modules or custom module development required
   b. Simple and streamlined registration and donation processes and set-up
   c. Depth and breadth of digital fundraising tools available
   d. Social media integration
   e. FAQ or user help options

3. **Communications Vehicles**
   a. Integrated communications types: email, text, telephone
   b. Audience groupings and segmentation
   c. Push and triggered messaging capabilities
   d. Ease of connection to third-party solutions like MailChimp or Constant Contact, if not internal communication functionality

4. **Donor Engagement**
   a. Low transaction fees
   b. Automated tax receipting
   c. Matching gift integrations
   d. Ease of search (for participant or event to support)

5. **Reporting & Administrative Support**
   a. Cost per administrator (license fee or unlimited)
   b. Multi-level or single-level permissions for administrators
   c. Cost for web hosting (or unlimited)
   d. Reporting dashboards
   e. Custom reporting capabilities

Platform Scoring

Now that you know what you have and what you need, you can start shopping! Most platforms have a robust website outlining features and functionality to make it easy for you to check items off your list.

Don’t see something you’re looking for? Don’t rule that platform out just yet. Reach out and ask as the feature might be under a different name or it might be on their product roadmap for future implementation.

Investing in Your Organization's Future

Due diligence shouldn't be rushed. Selecting a new platform is a significant investment in your organization's future, so be prepared to take your time in conducting a thorough needs assessment or platform audit — at the start. This will result in a highly efficient vetting process and should also result in a smooth implementation process once your platform selection has been made.

And if you're trying to decide when you should conduct a needs assessment, remember: Not all needs assessments result in a change. Whether you choose to stay where you are or elect to change platforms, it can be a real benefit to conduct a needs assessment every couple of years.

Technology is constantly evolving and what may have been a roadblock to using a specific platform today may not exist tomorrow.

GOT IDEAS? LET’S TALK!

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