**BUYER’S PLAYBOOK FOR DONOR MANAGEMENT SOFTWARE TEMPLATE  
  
INSTRUCTIONS**:

* Save a copy of this document before you start editing.
* The text in blue is meant to help guide you through building your play book and can be deleted once you’ve completed the project.
* This is simply a guide. Each organization is unique. Make this playbook your own.
* **Feel free to DELETE THIS PAGE, once you build out your playbook.**

Buyer’s Playbook for Donor Management Software

[Organizational Name]

[Today’s Date]

**ORGANIZATION MISSION**

[Add your organization’s mission statement here. It’d help to reference your mission statement as you’re building your playbook knowing this investment will help strengthening your organization.]

**KEY STAKEHOLDERS**

[Fill out the matrix below and add any relevant details that you think would be helpful. Establishing clear roles in the selection of your donor management software will make decision making easier.]

| **Project Lead** | **Team Member** |
| --- | --- |
| **Project Team Members:** Who needs to be involved in the vendor review process |  |
| **Decision Maker(s):** Who will be making the ultimate decision |  |

**TIMELINE**

[Establishing a clear timeline will allow you to stay on track and makes it easier to communicate your process with the various donor management software providers.]

| **Date** | **Action Item** |
| --- | --- |
| MM/DD/YYYY | Kick-off Meeting / Build out worksheet with key stakeholder involvement. |
| MM/DD/YYYY - MM/DD/YYYY | Book initial discovery meetings with software providers typically 15-30 minutes each to asses fit |
| MM/DD/YYYY - MM/DD/YYYY | Schedule full software demos for the entire selection committee to participate and provide feedback. |
| MM/DD/YYYY | Final decision is made |
| MM/DD/YYYY - MM/DD/YYYY | Schedule implementation and data transfer with new software provider. |

**CURRENT CHALLENGES**

[After talking to your team, add a list of pain points you have with your current fundraising software. If you’re not currently using any software, explore what things your team needs in order to fundraise more effectively. This list can be used to guide conversations with software providers.]

* [Challenge 1]
* [Challenge 2]
* [Challenge 3]

**KEY REQUIREMENTS**

[Provide a list of key functionalities that you want to make sure each provider offers to address your pain points]

* [Key Requirement 1]
* [Key Requirement 2]
* [Key Requirement 3]

**FEATURE & FUNCTIONALITY MATRIX:**

Use your paint points and key requirements to complete a comparison matrix. This will help you pull together a visual comparison of the providers you’re considering and their functionality. Make sure to indicate the importance of each type of functionality using the following scale (or use one that works for your organization):

* Must have
* Nice to have
* Optional

As you’re talking to software providers fill out the provider column based on the conversation and demo you schedule with the provider ranking each item using the following scale:

0 - Does Not Offer this functionality

1 - Offers part of this functionality

2 - Fully offers this functionality

| **Requirement** | **Priority**  - Must have - Nice to have  - Optional | **Provider**  - 0 -Fully offers  - 1- Partially offers  - 2 - Does not offer | **Notes** |
| --- | --- | --- | --- |
| **OVERALL** | | | |
| Intuitive, user-friendly |  |  |  |
| Value |  |  |  |
| Security |  |  |  |
| Integrations  *(list which ones you’ll need)* |  |  |  |
| Onboarding & implementation |  |  |  |
| Support |  |  |  |
| On-demand trainings (videos, webinars, community) are included |  |  |  |
| Consulting Offering |  |  |  |
| Mobile App |  |  |  |
| **RELATIONSHIP MANAGEMENT** | | | |
| Gift designations |  |  |  |
| Customizable donation forms w/monthly giving |  |  |  |
| Peer to Peer functionality |  |  |  |
| Volunteer tracking |  |  |  |
| Donor portal |  |  |  |
| Tribute / Memorial Gift tracking |  |  |  |
| Credit card expiration notifications |  |  |  |
| **DATA MANAGEMENT** | | | |
| Bulk data import/export as CSV files |  |  |  |
| Ability to merge data |  |  |  |
| Data storage |  |  |  |
| Manage duplicates |  |  |  |
| Open API |  |  |  |
| No coding knowledge required |  |  |  |
| Auto Update - change of address and deceased |  |  |  |
| Task reminders |  |  |  |
| **COMMUNICATION** | | | |
| Customizable (drag & drop) email templates |  |  |  |
| Customizable email autoresponders (subject line & body) |  |  |  |
| Marketing automation (i.e. auto-adding donor to newsletter) |  |  |  |
| Segmentation |  |  |  |
| Social listening |  |  |  |
| Engagement scoring |  |  |  |
| A/B testing |  |  |  |
| Contact/Survey forms |  |  |  |
| Email opt-in options in forms |  |  |  |
| Customizable forms |  |  |  |
| Customizable landing pages |  |  |  |
| Mobile optimization |  |  |  |
| Event registration |  |  |  |
| Ticket sales |  |  |  |
| Merchandise sales |  |  |  |
| **REPORTING** | | | |
| Library of standard reports & dashboards |  |  |  |
| Grants management |  |  |  |
| Filter/group donors |  |  |  |
| Custom tags |  |  |  |
| Retention rate calculator |  |  |  |
| Moves management functionality |  |  |  |
| Donor portfolio management |  |  |  |
| Volunteer engagement |  |  |  |
| Scheduled reports |  |  |  |
| Program participation |  |  |  |
| Donor visits |  |  |  |
| Conversation tracking |  |  |  |

**PRICING**

Here’s a basic table you can use to collect information on pricing estimates you recieve from the providers you explore. Like everything in this playbook, you should make this your own an add additional columns as needed.

|  | **Monthly Fee** | **Implementation Fee** | **Additional Fee(s)** |
| --- | --- | --- | --- |
| Software 1 |  |  |  |
| Software 2 |  |  |  |
| Software 3 |  |  |  |