



The buyer's guide to nonprofit fundraising software

Are you still keeping your donor data in spreadsheets, using multiple tools to communicate with donors, or struggling with over-complicated donor management systems? Chances are, you're not giving your donors the best experience! Are you looking for a way to enhance your donor experience and simplify your fundraising process? Say goodbye to spreadsheets and juggling multiple tools! With modern fundraising software, you can provide donors with a seamless and efficient experience and streamline your organization's communications with ease.

By combining the best donor management technology with easy-to-use communication tools, good fundraising software can transform your organization's fundraising strategy. You'll build lasting donor relationships, spot missed fundraising opportunities, save time, and collaborate more effectively with your team.

Fundraising software should be simple to use, provide comprehensive insight into your donors' giving activity and priorities, and reinforce your confidence that you're planning campaigns effectively. But there are so many options to choose from!

In this guide, we'll take a look at exactly how fundraising software can benefit your organization, what features to look for, and the questions you should ask before you make the switch.



WHAT FUNDRAISING SOFTWARE CAN DO FOR YOUR NONPROFIT

Fundraising software can turbocharge your organization's efforts in a variety of ways, boosting donations and reducing the amount of time your team members spend on various fundraising tasks. When you have an existing database of donors (we recommend building a minimum of 100 donor profiles to benefit fully), you can put that data to work to inform the types of campaigns you run, the messages you use, what you ask for, and how you thank your donors.

5 TOP BENEFITS OF USING FUNDRAISING SOFTWARE

Adopting (or upgrading) technology is the best way for a nonprofit to harness the generosity of donors in an ever-changing world. Here are five benefits to making software part of your fundraising strategy:



1. Raise funds with confidence.

One of the most powerful benefits of using fundraising software is the understanding you'll develop about your donors' characteristics, preferences, and giving behavior. You'll be able to see, at a glance, information like:

- Which donors are connected?
- What projects and programs a donor is most interested in?
- How much a donor has given to specific projects and programs?
- What types of campaigns a donor has been most responsive to?
- What time of year a donor is most likely to give?

Use this information to plan fundraising campaigns with confidence, knowing that you're reaching the right people with the right messages.

“ Bonterra Donor Engagement's Guided Fundraising solution (formerly Network for Good) has helped me organize all of our donors in one place. I can keep track of their contact information, send them thank you letters in several different ways, plan and execute fundraising campaigns, and probably more that I haven't even thought of yet!”

— **Angel Prince | Founder and Director**
Prince Dance Theater, Guided Fundraising customer

2. Give your donors a better experience.

Having all of this information allows you to segment your donors by a variety of criteria and craft your communications accordingly. Customizing and personalizing communications doesn't just result in increased donations. It also creates a better donor experience, which should increase donor retention. Donors feel known, understood, and valued, generating a stronger bond with your organization. And, since it costs more to acquire new donors than it does to retain your existing ones, this will have a positive impact on your bottom line.

3. Work with accurate data.

Data spread across multiple software systems and spreadsheets is difficult to keep up to date and can be frustrating to manage. Information may be updated in one place, but not in another. The amount of time required to update data may result in delayed information, meaning that campaigns are created with inaccurate data. When a change is made in one area of your donor management system, the software automatically updates that information across the system.

4. Save staff time.

Fundraising takes time and effort. Nonprofit staff often experience overwhelming workloads trying to complete these tasks without the aid of software. Fundraising software can streamline multiple processes, from creating online fundraising pages to sending gift receipts, relieving pressure on busy team members.

The Guided Fundraising solution takes this a step further by providing expertly written templates and step-by-step guidance for your online fundraising pages, peer-to-peer campaigns, appeals, and more. Our customers can simply select a template, customize it for their nonprofit, and start fundraising.

The national
average
for donor
retention is
43%

For Guided
Fundraising
users, it's
49%

– AFP Fundraising Effectiveness Project



5. Build a stronger strategy.

Saving time on previously manual processes will enable your staff to devote their energy to more strategic work. But the right fundraising software for you shouldn't just help you check the boxes, it should make checking the boxes easier through guidance from professional fundraisers and best practices. Now your staff can focus on optimizing the donor experience, generating new ideas for fundraising campaigns, and analyzing giving data to better target donors in the future. These strategic efforts will position your nonprofit to generate more revenue and better fulfill your mission.

Additionally, when preparing to present the idea to your board, don't forget to calculate how much you'll save by eliminating tools that will no longer be needed with an all-in-one fundraising software. You can ditch your email builder, SMS texting platform, event ticketing service, collaboration software, and more.



Guided Fundraising eliminated double entry between our online giving pages and donor management system, which streamlines our data entry process. Bonterra's staff is very helpful and receptive to feedback. The tools are seamlessly integrated with modern dashboards.”

— Zach Sloan | Chief Finance and Operations Officer
Prince Dance Theater, Guided Fundraising customer

5 Reasons your nonprofit needs fundraising software:

1. Raise funds confidently when you have key insights about your donors' characteristics, preferences, and giving behavior.
2. Personalize and customize communications for increased donations and a better donor experience.
3. Easily keep data updated automatically so you're always working with accurate data.
4. Save time on building campaigns, fundraising pages, and more.
5. Free staff to work on creating a data-backed, sustainable fundraising strategy.

BONUS: Save money by eliminating tools that will no longer be needed with an all-in-one fundraising software with integrated functionality!



To say I love Guided Fundraising is an understatement, it has made my life so much easier, and I've had nothing but good feedback from both my board and donors. My only regret is that we didn't switch over sooner."

— Lindse Barks | Director

Mid-Del Public School Foundation, Guided Fundraising customer

20 MUST-HAVE FEATURES

Functionality varies widely from one fundraising software to another. Some primarily serve as databases only, while others, like the Guided Fundraising solution, allow you to create and run multi-channel fundraising campaigns from the software. Here's what to look for:

1 Robust dashboard

Being able to see the information you need at a glance will save time otherwise spent creating unique reports. You should be able to visualize your most important data points on your dashboard and access real-time reports and information.

2 Real-time activity feed

In addition to a useful, centralized feed, you'll want to see a feed that reports activity happening in real-time. This is especially important when running time based fundraising campaigns.

3 Numerous contact profiles with custom fields

The more you know about your donors, the better able you'll be to customize and personalize your communications. Contact profiles should allow you to add information easily and later sort and segment by a wide variety of criteria. You'll also want to be able to create custom fields to add data that is unique to your organization.

4 Households and relationships

It's helpful to know which donors are related and who knows whom. You can use these relationships to create more powerful messaging.



“ Everything has been easier since we switched to the Guided Fundraising solution. Finding and correcting duplicates and keeping our households up-to-date has been an ongoing project for years and addressing this on the new database is so much easier!”

— Sheila Wells | Development and Communication Director

Wide Angle Youth Media,
Guided Fundraising customer

**5**

Duplicate prevention and merging

Donors have multiple email addresses and phone numbers, so it's easy to end up with duplicates if your software can't identify and merge duplicate records.

6

Simple query builder and segmentation

It should be simple and quick to find the data you need in your software, and just as easy to create segmented lists. Reporting shouldn't be complex. You should have pre-built filters and easy access to your favorite, personalized reports.

7

Task management and reminders

Organize your team's tasks as well as your own and automatically send reminders to the individuals assigned to each task. From board members to volunteers, make sure everyone can lend a hand to fundraising with your oversight. Task management ensures that nothing falls through the cracks.

8

Peer donation page builder

Peer-to-peer fundraising is incredibly effective, so you need a platform that contains this functionality. Your software can make it simple to create a template design that's easy for your partners to tailor. Having your donation pages built into the software means that all the data and donations that come in through these pages are automatically recorded and easily searchable.

9

Custom forms

You'll want the ability to create custom forms for use on your donation pages and website pages. Use forms to collect volunteer information, contacts for your mailing list, and more.

10

Cloud-based and accessible via mobile devices

Today's teams are often working on the go. If your software isn't easy to use on smartphones and tablets, your staff will be frustrated.

11 Send and track email blasts

Having this functionality built into your fundraising software instead of using a separate service allows you to manage email lists easier, reach the right groups of donors, and achieve higher open rates through simple and more personal communication. You can easily create reports that show which emails were the most opened, which links were the most popular in a given email, how much money was generated from each email, and who to follow up with later.

12 Mail merge and direct mail

Easily create offline communications with data by using the mail merge and direct mail functionality.

13 Bulk text messaging

Communicate with your donors in whatever way they find most appealing, including text messaging, data by using the mail merge and direct mail functionality.

14 Text-to-give

You can make it easy for donors to give at special events by offering text-to-give. Your software can set up text-to-give campaigns, including numbers, and track all of the data and gifts associated with each campaign.

15 Video messages

Authentic video messages are key to building strong donor relationships and let you stand out from your competitors. Guided Fundraising customers have found that thanking donors with our video messages feature leads to 50% more repeat donations compared with emails.

16 Campaign management and pledge management

Easily create, run, and analyze campaigns, track pledges, and send reminders to constituents.



“It’s really changed our lives for the better. It’s a dream to use the system and I’ve been recommending Guided Fundraising like crazy to all of my nonprofit friends.”

— **Jennifer Fancis | Executive Director**
OKC Metro Alliance, Guided Fundraising customer

15 Video messages

16 Campaign management and pledge management



“ We LOVE the video messaging. The feedback we get is amazing...we’ve had people text us after they received their video to tell us that they were in tears over their personal messages.”

— Jessica Chapman | Director
of Development
Child Abuse Prevention,
Guided Fundraising customer

17

Virtual and hybrid events

Online events are the future! Your software should have a built-in event functionality that lets you host online or hybrid fundraising events to help you reach more supporters and maximize your event ROI.

18

Auctions

Having an integrated auction platform built into your fundraising software helps you host better auctions with fewer headaches by giving you the flexibility to easily add to an event or host an auction without the extra leg work of finding and learning a new platform.

19

Insight from the pros

Set up and send professional, multi-channel fundraising campaigns in minutes with the right fundraising software. Your software should make you a better fundraiser — pre-built reports, top templates, and **professionally designed communication plans** will build your confidence and boost your results.

20

Stellar customer service

Everyone needs a little help sometimes. Look for software with free customer service and onboarding so you can get the most out of your new system. Look for a software with phone, email, and in-app support so you can get answers quickly.

“

WOW!!!! We used a template and had a HUGE response!! This template was extremely useful to start with and we just tailored it to our liking. Within 24 hours, we raised \$2,505.00. Can you believe it??”

— Sayyidah Garrett | Founder & President
Pastoralist Child Foundation, Guided Fundraising customer

7 ESSENTIAL QUESTIONS TO ASK YOURSELF AS YOU CONSIDER FUNDRAISING SOFTWARE

Every nonprofit is unique, and every organization has specific needs. And every fundraising software specializes in something different. When you've narrowed down your options, you may find that you have difficulty making a final decision. Here are seven questions that will help you make that final choice.



1. Should we purchase an all-in-one system or mix-and-match providers?

An integrated system offers data consistency, simple workflows, better collaboration and project management, and ease of use. An all-in-one will typically be less complex to set up and use on an ongoing basis. Plus, you'll spend less overall when you just have one software subscription to pay for.

2. Have we considered the process of data migration and import?

Different systems have different processes for data migration and importing, and some are notoriously difficult. Some vendors charge an additional fee for migration, so you'll want to find out if there is a fee and, if so, how much. You'll also want to see how much help you'll have access to. Does the provider offer assistance? Do they charge for this service? How long will the process take? And will their process put any of your data at risk?

We know onboarding and data migration is one of the most intimidating parts of adopting fundraising software. The Guided Fundraising team offers free data migration with a dedicated onboarding specialist to make this process seamless.

3. How reputable is the software vendor?

Unfortunately, startup software companies often run into cash-flow problems, customer-service issues, and other hurdles that sometimes result in a shutdown. Other software companies may have strong histories but are inexperienced with the needs of nonprofits. For this reason, vet each provider you're considering by looking at the following:

- **Tenure of the vendor** — How long have they been in business?
- **Reputation of the vendor** — What do existing customers have to say?
- **Track record of product improvements** — Does the software provider frequently update the product and add new features that the majority of customers request?
- **Experience with nonprofit organizations** — Is the software built for nonprofits? Is it geared toward organizations of your size?

4. Does the software integrate with the other tools we need to use?

If your nonprofit relies on other software functions that are beyond what's typically included, it will need to integrate with the other software you use. Are integrations offered, and if so, how easy are they to use? Will additional integrations create duplicate data or other problems? And is there a fee to add integrations?



What is not to LOVE! Data migration is excellent! I have ALWAYS received help and/or answers to questions right away. If the person that I spoke with did not know the answer, they were always willing to have someone else get with our office to answer the questions.”

— **Jamie Brown | Chaplain and Administrator**

Madison County Sheriff's Department Chaplaincy Program, Guided Fundraising customer

5. What is the pricing plan and structure?

Is the pricing inclusive? Look for hidden fees for customer service, data import, etc., as these are quite common. Is the pricing structure clear and transparent? You don't want to be surprised by charges based on confusing pricing tiers. Is the pricing structure flexible? Your fundraising software should grow with you. Your needs will expand in the future, as will your budget to pay for them.

6. What about customer service?

You should be able to get help when you need it, in a variety of ways, including phone, email, and chat. Find out if you can get answers in a reasonable amount of time. Ideally, the provider will assign a point person to help you onboard and get going.

You should also have access to training to help you get the most out of the system — without being charged extra.



They handle the data migration, give excellent and efficient phone AND chat support and don't charge you extra for it, have an easy-to-use platform and offer the best webinars of any donor management system I've seen (and I watch a LOT!). It's SO nice to have all our data on hand and accessible."

— Holli Melancon

NeighborWorks Columbus, Guided Fundraising customer

7. Is this software built for my nonprofit?

Some software is incredibly robust. Organizations often find that they need to hire expensive consultants just to manage their donor data. Others are lightweight tools that only offer a few features. Be aware that your organization might outgrow it sooner than you expect. To help you make the right choice for your organization, look at case studies, customer testimonials, and review sites like G2 and Capterra and pay extra attention to the size of the nonprofits that are successful on each platform.

Carefully chosen fundraising software is a powerful tool that helps nonprofits streamline operations, saves staff valuable time, and increases fundraising results, generating more revenue for the important work they do. But we believe that great software does more than that – it helps you become a better fundraiser.

“ We’re doing a lot, and it’s because I can raise the money to keep doing it, keep deepening those relationships, sharing the stories...because we have the money now. I’m really good at my job now. I love that it also allows me to stress a little less and enjoy it a little more because it works so well.”

— Robin Morris | Executive Director
Wide Angle Youth Media, Guided Fundraising customer

Want to learn more about why Bonterra Guided Fundraising might be the right fit for your nonprofit?

Talk to a team member →

