Findings & Recommendations

Digital Infrastructure: Non-profit Tools

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Summary

In July of 2021, two volunteers conducted a systematic study of tools for a digital infrastructure to manage our nonprofit startup. They looked at tools for

- CRM
- project & task management
- mailing list management
- team wiki
- artifact management

These are their findings and recommendations.

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CRM(s)

Intro- We researched the available tools industry-wide, as well as ones that were gated specifically towards non-profits. Some of the industry-wide well-known CRMs that we looked into include Zoho, SAP, Salesforce. Non-profit-specific CRMs we looked into include Salsa, Neon, Bloomerang, EveryAction, Kindful, Donor Perfect, Virtuous. The CRM will provide a massive ROI over time, but will likely come with the highest subscription cost (per month) compared to the other tools. One thing we learned through background research was that some industry-wide, well-renowned CRMs like Salesforce require the help of a paid consultant to implement. However, some CRMs like Salesforce do offer sizable discounts to 501(c)(3) nonprofits and also provide various extra add-on features and services.

Background Info- The CRM is basically used as a platform for an organization to easily and effortlessly manage its business-related contacts like potential clients, customers, event participants, volunteers, donors, etc. A well-designed CRM generally has several capabilities including contact management, sales management, and other more specific useful tools that will help the organization focus on what's important and spend less time & effort organizing and keeping track of relationships. Based on the background research we committed, we found that there were mainly 3 types of CRMs: Operational, Analytical, and Collaborative CRMs. These were split across different subcategories in an old-fashion manner, and we found that many CRM tools nowadays, implement all (or many of) these features into one, providing for great versatility and usability.

Narrowing Down- After looking at demos, feature lists, and online customer (and non-profit specifically) reviews, we found that the top two CRMs used by similar-sized nonprofits with matching needs included Salsa and Neon CRM. They are both cloud-based CRMs which means that you can easily access the platform on the browser. They both have high ratings and well-ranking customer reviews on reputable platforms and sites. These two CRMs are the most highly recommended tools by professionals and real-world users working in a non-profit environment, which fit our budget, needs, functions, and constraints.

Salsa is a CRM specifically geared towards nonprofits, including many features: the CRM itself, online fundraising, digital marketing, multi-channel advocacy (click to call, direct email, and legal targeted messaging). Salsa enables the organization to combine offline and online supporter information, as well as automating certain tedious tasks like gift acknowledgments, targeted list building, training & support, all into one versatile platform.

Neon CRM is a well-designed software suite that includes multiple applications in the fields of fundraising management, donor management, membership management, event registration + management, customized reporting, and a lot more. This tool, like the last one, is specifically built towards nonprofits and boosting their experience with contact management. This tool has a much more user-intuitive interface, and integrates many small, but seemingly useful, features that may benefit the organization:

Salsa	Neon CRM
Donor Management, Donor Development, Online Donations, Donation Processing, and Gift Acknowledgment	Donor Management, Membership & Association Management, Donation Processing, Automated Receipting, Grant Management
Mail Merge, Direct Mail, Email & Social Marketing, and List Segmentation, Online Fundraising, Peer-to-Peer Fundraising	Marketing & Communication Management, Social Fundraising, E-commerce, List Segmentation, and Online Webforms & Survey Builder
Event Management, Grant Management, Volunteer Management, and Membership Management	Event Management, Document & Storage Management, and Volunteer Management
Task Reminders, Reporting & Queries, Security & Permissions, Mobile Engagement, and Dashboard Analytics	QuickBooks integration, Activity and Notes Management, Letters & Material Tracking, API & Customization, Reports & Analytics
Deployment: Cloud (SaaS) Web-Based	Deployment: Cloud (SaaS) Web-Based, Desktop Mac, Desktop Windows, Mobile Android, iPhone, iPad
Support: Email, Phone Support, Live Chat, "Knowledge Base"	Support: Email, FAQs, Forums, Phone Support, Live Chat, "Knowledge Base"
Training: In-Person, Online-Live, Webinars, Documentation	Training: In-Person, Online-Live, Webinars, Documentation, Pre-recorded Videos
Price: Talk with Consultant #TODO	Price: ~$50 per month

Recommendation- We would overall recommend Salsa, due to a couple of reasons. Firstly, it is lighter on the pocket and does not have as many disadvantages or missing features when it comes to picking the lowest tier subscription. For example, picking Neon CRM's lowest tier package which costs around 50 dollars a month means that you will be missing out on QuickBooks integration, Survey Builder and Form Management, Email Marketing, Document Storage, and much more. Although some of these features are not even on the Salsa Platform, some of the features that you will be missing out on by picking a lower-tier subscription with Neon will be important and were included in the requirements document. Secondly, features

like Gift Acknowledgment, Peer-to-Peer Fundraising, Task Reminders, Mobile Engagement, and Membership Management come with Salsa's lower-tier packages but are only found with Neon's highest tier package which costs about 300 dollars a month- which we cannot consider due to the budget and constraints.

There are not many cons to Salsa while comparing to its competitors like Neon CRM, because of its versatility and functionality-focused design. However, with Salsa, you will be missing out on Neon's usability experience, and Mobile App functions- both of which Salsa does not have. From online demos, screenshots, and reviews we found that Neon CRM was a little easier to use and understand due to its well-designed UI/UX, and the mobile & desktop-specific app which made it well-integrated and cross-platform.

Our Recommendation ✅ :

Task Management (n)

Intro:-We conducted some research and with our research, we found tools that are in our budget and useful towards what you guys need. Task Management is a process of monitoring your project's tasks, in a given organization, throughout the different stages from the beginning to the end. Task Management is one of the crucial aspects of Project Management. Some of the tools we have researched about and think would be the most useful in our scenario are ProofHub, Teamwork, ClickUp, Basecamp, Flow, nTask, Zoho Projects.

These tools are all great for task management however we would like to narrow it down to 2 or 3 tools. When looking at these tools the only downside that we encountered was that the tools do not have the features our company would be looking for or the tools are out of our budget. Some of these tools have many more features not just task management but in fact many other features like project management and because the tool has many other features not just task management it makes the tool much more expensive.

Background Information:-Task Management is a process of monitoring your project's tasks, in a given organization, throughout the different stages from the beginning to the end. Task Management is one of the crucial aspects of Project Management. Overall this tool is just to show and tell the workers on which task they should be doing. Some of the main features this tool usually has is to Create and Assign Tasks, Define task dependencies, Schedule deadlines for tasks using Gantt Charts, Avoid Missing deadlines and make use of the built-in calendar, share and collaborate files.

Narrowing Down-After analysing most of these tools we found out like I said before that most of these tools cannot satisfy the needs of our company. Most of them have many features which is a great thing but the only downside of that is that the tools with many features are out of the budget. The only tool I think that is not out of the budget but still has many features would be ClickUp. Another one great tool would be nTask this is because this tool has many management tools one example could be project management. This tool will not only help the company in task management but can help us in many other fields.

ClickUp-has a few advantages than ntask those include that click up has great features which include (TO-DO LISTS, PROJECT MANAGEMENT, DOCS & WIKIS, SPREADSHEETS, EMAIL, EVENTS, REMINDERS, GOAL, TRACKING, TIME TRACKING, SCREENSHOTS & RECORDING, RESOURCE MANAGEMENT, COMMENTS & CHAT). These features can really help our nonprofit stay organized and clean. The price of this tool is 5$ a month which is in our budget you can also use this software for free but with a few restrictions in the features. The reviews are also great and many companies have used this software to be organized and clean. A few companies have used this software and found it very simple to use and very organized to see all of the reviews click here

nTask - has a price that is a little more expensive than click up. The price of nTask is around 8 dollars a month so it still is in our budget but just a little more expensive. The key features of this tool are (Project Management , Task Management, Gantt Charts, Time Management, Meeting Management and many more) . When looking at the reviews it seems that nTask has a great ease of use but their functionality and customer support is not as good.

<mark>Recommendation-</mark>In our opinion both of these tools are great they have many features they both have a lot to give and although they have different features most of the features they have thwart the other tool does not have do not really matter. Because to make up for that loss they have added other tools. We think it comes down to price. nTask is 3 dollars more expensive than ClickUp. The reviews are great for both of them as well. So overall I cannot give a solid recommendation but between these 2 here is a table and here are the pros and cons:

nTask	ClickUp
TO-DO LISTS, PROJECT MANAGEMENT, DOCS & WIKIS, SPREADSHEETS, EMAIL, EVENTS, REMINDERS, GOAL, TRACKING, TIME TRACKING, SCREENSHOTS & RECORDING, RESOURCE MANAGEMENT, COMMENTS & CHAT	Project Management , Task Management, Gantt Charts, Time Management, Meeting Management and many more
Reviews-Suggest that nTask is an amazing task management tool however does not have great customer support	Reviews-Suggest that ClickUp is an amazing task management tool. The tools do not really state the downsides of these tools though.
Price -8$ includes free trials but with restricted access	Price-5$ includes free trials but with restricted access

Project Management (s)

<mark>Intro:-</mark>We conducted some research and with our research, we found tools that are in our budget and useful towards what you guys need. Project Management is A tool that has the capacity to help plan, organize, and manage resource tools for a given project. It can also be used to develop and make resource estimates in terms of cost, time, etc. Some tools that we have found are names Asana, Keela, Monday.com, Wrike. These tools would be the most useful and would be the best for this nonprofit. These are many tools overall we have to narrow it down to around 2 tools. Looking at the tools right now both Asana and Keela are out of the budget.

Asana we can afford but is around 12 $ and Keelna is 45$ which is way out of our budget. This narrows it does to 2 which would be Monday.com, Wrike

<mark>Background Information:-</mark>Project management is very important for a successful nonprofit company. This can plan out your whole schedule and make it much easier to organize your meetings as well as your breaks. The main uses of project management would be to Planning & Scheduling, Collaboration, Documentation, Evaluation. The tools we will need have to have these following features. Both of these tools have the following features; the only downside is that Wrike has fewer features than Monday.com. This makes sense mainly because Monday is a well and more formula company. The only reason we would really need this tool is to keep our coworkers informed about the meetings and assignments we have upcoming.

<mark>Narrowing Down-</mark>After analysing all of the tools that I listed at the beginning I think that the 2 option we have would be Monday.com and Wrike. This is because the other 2 tools are out of our budget and they do not have that many features compared to their price. Monday.com and Wrike are great but one of them is overpriced and very expensive this will not be great for our budget. One of them also has many more features than the other one. So there are overall many things that go into choosing the right tool for project management,

Monday.com-Monday.com is a great company but does not have the best reviews. Most of the reviews state that Monday.com does not have the best features in fact most of the features are very hard to use and take many days to understand how each feature works. Another one of the downsides of monday is that for every user it is around 8 $ per user and I am not sure if that is in our budget. Although Monday has a free trial the free trial is more for an individual handling the team and there can only be 2 team members. Which is not a lot at all so I do not think that is the best option for us. Overall Monday is out of your budget and has many features. This is not a good thing because it will take too long trying to figure out what each feature does.

Wrike-Wrike is also a great company. Their product features are great. There is not an overload of features, there is just an alright amount. The only downside of this is that figuring out the pricing is a little difficult so you don't exactly know which plan you need. Their pricing is great for us however. They do have a plan 10 $ a month but I don't think we need that. I think we need the free plan. The free plan can have unlimited users and the application is on many platforms. The reviews are also awesome. So in my opinion I think we should go with Wrike as our project management tool.

<mark>Recommendation-</mark>In our opinion both of these tools are great they have many features they both have a lot to offer and although they have different features most of the features they both have many things the other tools do not have . Monday has many features so it would be difficult to get the hang of each feature and the price is also not in our budget. Wrike however is in our budget and is the right amount of features as well. They also have perfect reviews which you can view here.

Wrike	Monday.com
Few features but more easier to grasp what each feature does and how to use each tool	Many more features but harder to understand what each feature does
Pricing plan is confusing	Pricing plan is confusing
Price is much cheaper basically free trial	Much more expensive for many features we probably won't even use. 10 $ per person.

Email List Management Platform (n)

<mark>Intro:-</mark>We conducted some research and with our research, we found tools that are in our budget and useful towards what you guys need. Email List Management Platform is a platform that basically has features that make the whole process of controlling contacts in segments or lists and personalize content for subgroups and segments. Email List Management tools are a key portion of marketing efforts in an organization. The tools that we found for Email List Management Platform are [Moosend](#), [Constant Contact](#), [HubSpot](#), [Zerobounce](#), [Kindful](#), [Mailchimp](#), [Emma](#). These are all great options for your guys. But most of them are out of your budget. Looking at the list right now. The only ones in our budget would be [Constant Contact](#), [Zerobounce](#) and [Moosend](#). These three tools are the tools I have lowered it down too.

<mark>Background Information:-</mark>Email List Management Platform is very important for a successful nonprofit company. The main reason for this is because of the advertising and how many different companies will know about your accomplishments as well as the amount of new customers we might get. So overall Email List Management Platform is a platform that basically has features that make the whole process of controlling contacts in segments or lists and personalize content for subgroups and segments. Email List Management tools are a key portion of marketing efforts in an organization. The uses of this tool include Maximize sales and interaction through effective promotional and marketing effects, Maintain and grow email and customer information list, Use HTML formatted emails with customizable fields that can target the specific end-user. Overall Email List Management Platform can have a great effect on your nonprofit.

<mark>Narrowing Down-</mark>After analysing all of the tools that I listed at the beginning I think that the 3 options we have would be [Constant Contact](#), [Zero Bounce](#) and [Moosend](#). Moosend and Constant Contact both have the HTML mail formatting while the [Zero Bounce](#) really does not. So that is one of the downsides of the [Zero Bounce](#) I will not be including this into the list of narrowed down tools because of this. Each of these tools have their own disadvantages just like [Zero Bounce](#).

[Constant Contact](#)- [Constant Contact](#) is a great company and great for emails. Some of the advantages of this tool is the HTML formatting in the emails and the amount of features this tool has. The only disadvantage of this tool is that this tool costs 20$ a month which is 10 $ above our budget which I am not sure If we can go this high above our budget. Some more disadvantages for this tool include that if you get more thousands of people to email the contract gets more complicated but I doubt that will happen to our nonprofit. Their templates also do not have a lot of flexibility. But because of the HTML format I think it will be changed.

[Moosend](#)- is also a great company. Their product features are great. There is not an overload of features, there is just an alright amount. This tool also does not have a lot of disadvantages. In fact it has great 5 star reviews by other nonprofits stating that this is the only email platform you will ever need. It's prices are also great. It only costs 8$ a month which is great. Another one of its advantages is that it has HTML format emails. I could not really find any disadvantages of this tool. Here are the [reviews](#)if you guys would like to check it out.

<mark>Recommendation-</mark>In our opinion both of these tools are great they both have excellent features. The only thing that sets them apart is the reviews and mainly the price. If we can afford a tool

which is 10% more $ expensive then I think we should go for Constant Contact if not then we should go for Moosend. Mooseheads reviews are great and also has many great features.

Moosend-	Constant Contact
More affordable 8$ a month	More expensive 20$ a month
Pricing plan is great and so are the reviews	P{rice plan can get confusing according to the reviews
Has the uses we need	Can give us the uses we need.

Wiki tool for internal collaboration

Intro- A wiki tool for our nonprofit is just a tool for the internal part of our company. The definition of a wiki tool is Collaborative internal website, with easy organization. So we are looking for a Wiki tool that is easy to use and understand. This tool is more for our company than for our customers according to the uses of this tool. The three tools that we have started looking at are Zoho and confluence. While doing my research both of these tools seem great so I do not think I can choose one but I will be choosing my recommendation on what tool you guys should use. For this I will add the pros and cons of each and then add my recommendation.

Background Info-The definition of a Wiki is a website that allows collaborative editing of its content and structure by its users. For us the users will be our coworkers. A great designed Wiki contains the following features: creating a page, editing a page, linking between pages. These are the basic features of a Wiki. Right now the process of the Wiki that I am provided with are all in the same budget they all also are in our budget which is great. So pricing won't be a problem. Now it is just the features and the ease of use. That will determine which tool we should use.

Narrowing Down-A wiki is a great tool to be shared between a workplace. The only disadvantage of a wiki would be that some of the tools are very simple to understand and use. In our scenario we have Zoho which I understand is a very simple self-explanatory tool that almost anyone can use. While confluence of what I understand is a little harder to understand how to use and also is much more complicated. So now it depends on how much time you guys would be willing to put in.

Zoho This is a great tool. This has actually been one of the picks for the CRM. The advantages of this tool is that it is much easier to use and understand. The reviews of this tool are also great and credible. The price is also perfect for our budget and has barely any disadvantages. The price for these tools is around 3 dollars. IN this plan the features you get are (1GB storage/ User Unlimited Pages and Revisions, SSL Support, ZIP Backup, RSS and Atom feed Access, Controls Customizable, CSS Custom, Domain Public, Sharing) These are all great features and will come in handy for our company. The reviews of this company and their wiki are great. They have 100+ positive reviews and 0 negative social media negative reviews! Which is great this means their company is great and has no disadvantages.

Confluence This tool is a little more complicated to understand and navigate around. But overall I think this tool would be the best if you guys are willing to put in time to understand. There are many tutorials and if you guys can put the time in I think this would make our wiki the best looking most organized wiki out there. The pricing of this wiki is also great. It is around 5 to 10 $ depending on what plan you guys would like to choose. The reviews are a mix. But the main disadvantage most people states are that they wish the navigation would be easier.

Recommendation-I think you guys should go with Zoho wiki. It is a great easy to use wiki. While Confluence is a little more hard to navigate around and much more complicated. At the end it comes down to your preference.

Data and Asset (Artifacts) Management

Intro- A Data and Asset Management tool for our non-profit would be a great addition to the list of tools we already have. The main goal of these tools would be to help the organization in ways like storing the data, analyzing the data and processing all of the data, as well as finding the value in the data the organization has provided. Basically this tool would be to process, analyze and store data. The tools definition is a tool for organizations like ours to harmonize all of the data they have. Once the tool has all of its data it can analyze, store and process all of its data. The main tools that we have looked into are Segment, Incorta, Alation, Replication, Funnel.

Background Info-The definition of a Data and Asset Management is organizations like ours to harmonize all of the data they have. Once the tool has all of its data it can analyze, store and process all of its data. So overall all the tools should do is store, analyze and process all of this data. Some of the features found in most tools like this are searchable databases, version control, proofing and approval workflows, rights management, and permission-based access. These are all very common features and are great. These tools cost anywhere from 15 dollars a month to 35 dollars a month according to google. However when looking at the tools most cost over 200 dollars a month.

Narrowing Down-Most of the tools that we looked into are extremely expensive and not worth the money in my opinion. These tools cost a few hundred dollars although they have many different and interesting features. All of the features may be useful to our nonprofit but are not in our budget and instead of using these we can still use Google Drive. However if we still would like to invest in a tool we should not go with Incorta its cost is out of our budget, Alation as well as Replication and Funnel seems also to be out of our budget. All of these you have to request a demo to get the price. (*I got the process of reviews and google so they are not that trustworthy.) The only tools that are left are Segment and Google Drive because both of these are free.

Google Drive:-This is a free tool and our nonprofit is using this right now at the moment. So most of the coworkers already know how to use this tool. So it is perfect for now. Like I said it is free so it is also in our budget. The functionality and features are also great it included docs and slides and almost unlimited storage in the cloud. Google drive is a stable and great place to store data.

Segment -Segment is expensive if you buy it but you can use this for free which is great. This is what we will have to do because it is very expensive and it is definitely not in our budget. So overall we would have to use the free trial. And this tool would have limited features because of the free trial the reviews of this tool are great but may be not right because the people who wrote these reviews bought the actual product and did not use the free trial.

Recommendation-We think that we should just use Google Drive because it is free and most of our workers already know how to use it so we should continue using it because Segment would have limited features.

Summary Recommendation

- For the CRM our recommendation would be Salsa

- For the Task Management Tool we have nTask and ClickUp

- For the Project Management we have chosen Wrike

- For the Email List Management Platform we have chosen Constant Contact as well as Moosend

- For the Wiki tool we have chosen Zoho Wiki

- For the Artifact Management we have also chosen Zoho WorkDrive

Although we recommend all of these tools we have a secondary option which would be to use Zoho's Suite which contains all of these tools and the tools in this suite have many features they are also have many advantages compared to these single tools. We recommend to use the free trials of all of these tools so you can understand the advantages as well as how the tool is used.