

Nonprofit Technology Network

Your Voices:

2007 CRM Satisfaction Survey

**An NTEN Report
December 2007**

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About NTEN: The Nonprofit Technology Network

What we believe

NTEN aspires to a world where all nonprofit organizations skillfully and confidently use technology to fulfill their missions. As the membership organization for the nonprofit technology community, NTEN plays a unique role in this field. Our work is to connect our members and provide you with learning and professional development. We give a bird's-eye view of the trends, issues, and opportunities that influence nonprofits' use of technology. Our ability to see the big picture and context allows us to identify areas of common opportunity and organize for action.

What we do

NTEN is a community of peers who share technology solutions across the sector and support each other's work. We enable our members to embrace advances in technology confidently through on- and off-line knowledge sharing, hands-on trainings, and research and industry analysis. Our discounts help our members stay up-to-date with changing technology and valuable resources. We offer news and pioneering industry research and are a channel for the dissemination of innovation and learning in this field.

NTEN WEBINARS / nten.org/webinars

NTEN hosts many online trainings and discussions each month on topics related to nonprofit technology.

ONLINE NETWORKING / groups.nten.org

Do you want to connect with other nonprofit webmasters, talk about open source CMS tools with others passionate about them, or learn ways to use Flickr in your next campaign? Then join one of these NTEN Affinity Groups (or a few of the more than 90 others) and start talking.

NTEN EVENTS / nten.org/events

Attend our conferences and local meet-ups where people like you come together to share experiences, learn, network, make deals, and have some fun.

NTEN Research / nten.org/research

Our industry-leading research is growing and expanding. We have recently published studies on IT Salaries and Investments in the nonprofit sector, the impact of technology consulting, and the challenges of data integration and Open APIs. We cover policy issues such as Net Neutrality, the use of mobile phones or content management systems in nonprofits. Look for more in 2008.

NEWSLETTERS / nten.org/signup

NTEN Connect is your opportunity to read about the latest issues from a variety of viewpoints. For each issue we ask leaders in the nonprofit technology community to sound off on a topic that's impacting the field.

NTEN BLOG / nten.org/blog

NTEN's blog is the place to find out about the latest resources, nonprofit tech news, and buzz from the NTEN community.

Introduction

A constituent relationship management (CRM) system can be one of the most important tools a nonprofit uses. A good system can help improve staff efficiency, foster better communication with stakeholders, and offer insight into programs by helping to evaluate results.

But choosing a CRM can be frustrating and overwhelming. With so many choices and so little time to research all the options, many of us rely heavily on the recommendations of our peers to cut through the noise and provide some insight. This is why NTEN is proud to present the results of our first CRM Satisfaction Survey.

Demystifying CRM

CRM — Constituent Relationship Management — is the set of processes and supporting technologies used to acquire, retain, and enhance constituent relationships (this definition is tailored from a Forrester Research definition, which states “CRM is the set of processes and supporting technologies used to acquire, retain, and enhance customer relationships”).

“Constituent” refers to ALL people with some relationship to the organization — donors, funders, volunteers, clients and all other people who help an organization to achieve its mission or are benefactors of the mission. “Enhancing the constituent relationship” can mean increasing donation amounts and frequency, volunteering, event attendance, client and supporter satisfaction, or other activities that further the impact of an organization’s mission.

-- From the Idealware article “Creating the Relationship-Centric Organization: Non-profit CRM” by Paul Hagen

About the Survey

Constituent relationship management can be an ambiguous term. For the purposes of this survey, we have included CRMs that self-identify as CRM providers, are not focused exclusively on fundraising, and are targeting nonprofit organizations. The CRM Satisfaction Survey asked the nonprofit technology community for their perceptions of 22 CRM systems. We wanted to find out:

- > What criteria are important for retaining your business/customer loyalty?
- > Which systems would you recommend, or highly recommend?
- > How you would grade CRM systems on their:
 - Quality and Reliability
 - After Sale Support
 - Vendor's Ability to Deliver on Promises and Deadlines
 - Usability
 - Value for the Price and Time Required to Implement

Respondents were asked to give each CRM that they consistently use a grade from A+ to F in each of the five categories. Invitations to the survey were distributed via email to the NTEN membership and community. Respondents were asked to forward invitations to additional communities, widening the response pool.

How to Use the Survey

According to CIO magazine, the recommendation of peers is one of the most important factors influencing decisions about technology vendors. We've surveyed hundreds of your peers in order to provide you with a wide array of opinions about CRM systems, and the characteristics of the vendors providing those products. Once you have identified two or three systems that meet your organization's needs, this report can help you to make your final decision as to which system is right for your organization.

There is no one perfect CRM for all organizations. The choice of a CRM system is influenced as much by the needs of your organization as by the system itself. The information in this report is not intended as a starting place for choosing a CRM. It can not replace an organizational needs assessment. Nor does this report provide information on the different features offered by CRM systems. For overviews and reviews of CRM systems and their features, you may want to look at articles at www.idealware.org or www.techsoup.org.

About the Results

More than 1,000 people provided some answers in the survey, and a total of 594 people completed the survey.

Over six hundred people indicated their willingness to recommend the systems they currently use. This data is presented in three sections: those with over 50 total responses, those with between 20 and 49 responses, and those with between 10 and 19 responses.

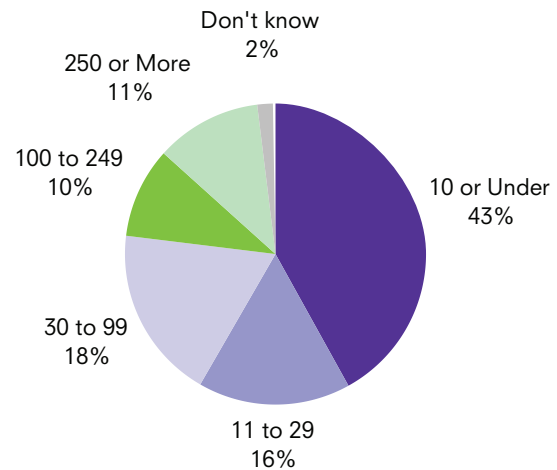
Of the 22 CRMs graded, four received more than 50 responses, six received between 20 and 49 responses, three received between 10 and 19 responses and nine received between zero and nine responses. In small sample sizes, scores that are extremely high or low can greatly influence results. Therefore grades for systems with zero to nine responses are not reported.

In order to make the information in this report as relevant as possible for your particular organization, we've reported not only the overall usage of each CRM system, but also usage by organization size. For the purposes of this report, small organizations are defined as having budgets under \$500,000; medium sized organizations have budgets between \$500,000 and \$3 million; large organizations have budgets between \$3 million and \$10 million.

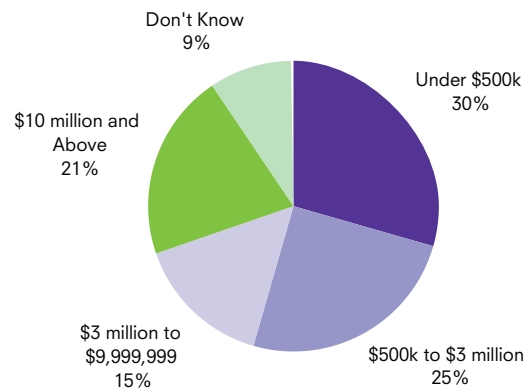
The information contained in this report is not to be used in marketing or promotional materials. If you have any questions, please contact NTEN.

Survey Demographics

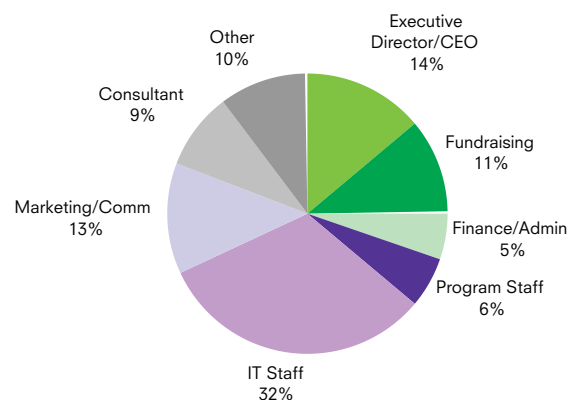
Number of Employees



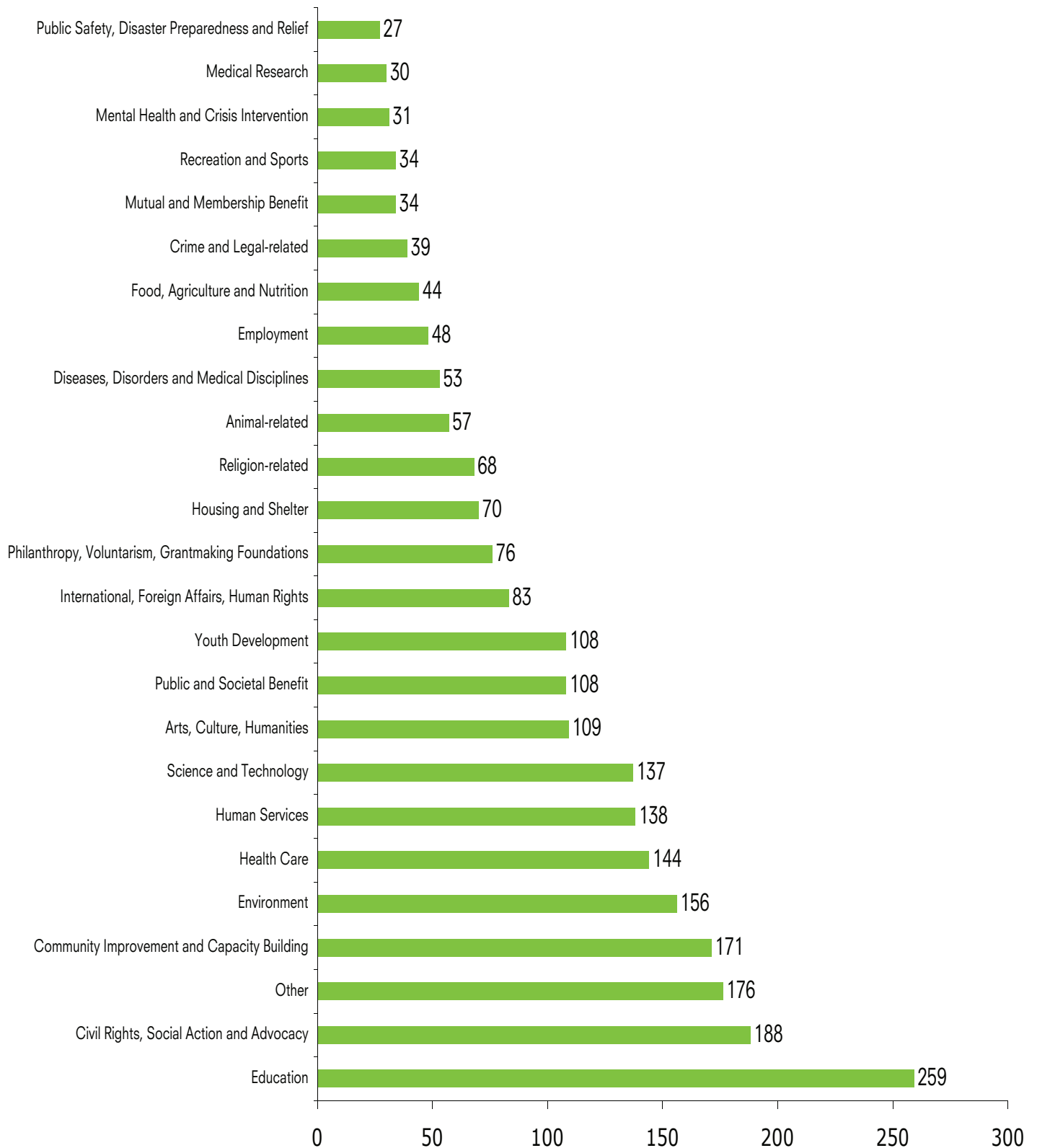
Budget Size



Title Breakdown



Survey Demographics: Industry



Important CRM Attributes

Respondents were asked to select the three attributes - without regard to a specific vendor - that they felt were most important for retaining their business/customer loyalty. Therefore, the total possible percentage is 300.

After sale support and a user friendly interface were the most valued attributes. Both were ranked in the top three more than 60% of the time.

Question: Which of the following CRM Vendor and software attributes do you consider critical when it comes to retaining your business/customer loyalty?

Respondents selected three of the following:

	Response Percent	Response Count
Provides ongoing support after the sale and implementation	63.01%	586
User friendly/intuitive interface design	61.29%	570
Understands our organization	44.3%	412
Delivers on promises	40.22%	374
Values our relationship	20.75%	193
Sets clear and consistent price structure	20.54%	191
Delivers on time	14.19%	132
Sets realistic deadlines	10.65%	99
Provides advance notice of product/service changes	10.54%	98
Other	8.06%	75
Forecasts and explains technology trends	7.10%	66

CRM Adoption

Excluding the 'Other' category, the three products that are most frequently used overall by survey respondents are CiviCRM, Convio, and Salesforce.

- > CiviCRM was the most commonly used by small organizations.
- > Salesforce was the most frequently used by medium organizations.
- > Convio was the most commonly used system by large organizations.

Question: For each of the CRM Products listed below, please select all those which you are currently using at your organization in some way.

	All Orgs Count/Percent	Small Orgs Count/Percent	Medium Orgs Count/Percent	Large Orgs Count/Percent
CiviCRM	106 / 15.94%	67 / 35.83%	20 / 12.82%	4 / 3.85%
Convio	102 / 15.34%	4 / 2.14%	16 / 10.26%	23 / 22.12%
Salesforce	67 / 10.08%	12 / 6.42 %	23 / 14.74%	13 / 12.5%
Kintera Sphere	61 / 9.17%	4 / 2.14%	16 / 10.26%	13 / 12.5%
Organizer's Database	36 / 5.41%	25 / 13.37%	6 / 3.85%	2 / 1.92
Democracy in Action	34 / 5.11%	12 / 6.42%	11 / 7.05%	4 / 3.85
Blackbaud netCommunity	26 / 3.91%	1 / 0.53%	7 / 4.49%	4 / 3.85
Avecra netFORUM	25 / 3.76%	1 / 0.53%	4 / 2.56%	7 / 6.73%
Antharia OnView	24 / 3.61%	4 / 2.14%	8 / 5.13%	7 / 6.73%
AdvSoliMIS	23 / 3.46%	2 / 1.07%	3 / 1.92%	7 / 6.73%
SugarCRM	15 / 2.26%	12 / 6.42%	1 / 0.64%	0 / 0%
Z2 Systems NEON	9 / 1.35%	1 / 0.53%	6 / 3.85%	1 / 0.96%
CitySoft Community Enterprise	5 / 0.75%	2 / 1.07%	2 / 1.28%	1 / 0.96%
Vtiger	5 / 0.75%	3 / 1.60%	0 / 0%	1 / 0.96%
The Data Bank	3 / 0.45%	1 / 0.53%	0 / 0%	0 / 0%
Compass CRM	2 / 0.30%	1 / 0.53%	0 / 0%	0 / 0%
CRM Metrix	2 / 0.30%	1 / 0.53%	0 / 0%	0 / 0%
CS Group Care CRM	1 / 0.15%	0 / 0%	0 / 0%	0 / 0%
Fisk Brett ProgressCRM	1 / 0.15%	0 / 0%	0 / 0%	0 / 0%
Green Moon	1 / 0.15%	0 / 0%	0 / 0%	0 / 0%
MPower Systems MPX	1 / 0.15%	0 / 0%	0 / 0%	0 / 0%
Other	116 / 17.44%	34 / 18.18%	37 / 23.72%	17 / 16.35%
TOTAL	665	187	156	104

For the purposes of this report small organizations are defined as having budgets under \$500,000; medium sized organizations have budgets between \$500,000 and \$3 million; large organizations have budgets between \$3 million and \$10 million.

Willingness to Recommend

The three systems that were most commonly used by all organizations - CiviCRM, Salesforce, and Convio - were ranked first, second and sixth in willingness to recommend respectively.

Question: Which of the following CRM Products would you be willing to recommend to others?

	Would Highly Recommend or Recommend	Rank	Response Count
Convio	71.6%	6	155
CiviCRM	91.3%	1	137
Salesforce	90.8%	2	131
Other	65.1%	9	129
Kintera Sphere	50.5%	15	99
Blackbaud netCommunity	68.3%	8	79
Democracy in Action	81.1%	5	74
Organizer's Database	81.5%	4	54
SugarCRM	84.5%	3	45
AdvSol iMIS	63.5%	11	41
Avecetra netFORUM	60.0%	14	40
Antharia OnView	71.0%	7	31
Vtiger	62.5%	12	24
Z2 Systems NEON	61.9%	13	21
CitySoft Community Enterprise	47.7%	17	21
The Data Bank	65.0%	10	20
CRM Metrix	42.7%	20	14
Compass CRM	46.2%	18	13
MPower Systems MPX	50.0%	16	12
CS Group Care CRM	40.0%	21	10
Fisk Brett ProgressCRM	40.0%	22	10
Green Moon	44.4%	19	9

Results sorted by response count.

Willingness to Recommend - By Organization Size

Excluding the 'Other' category, there were seven systems that were evaluated for willingness to recommend by a total of 50 or more organizations. We broke down the responses for these seven products by size of organization.

- > Convio, Salesforce, and Kintera Sphere's ratings were fairly consistent across all sizes of organizations.
- > CiviCRM was more likely to be recommended by small and medium sized organizations than large organizations.
- > Blackbaud netCommunity was much more likely to be recommended by large organizations than medium and small organizations.
- > Democracy in Action was much more likely to be recommended by medium organizations than either large or small organizations.
- > Organizer's Database was much more likely to be recommended by small organization than either medium or large organizations.

Question: Which of the following CRM Products would you be willing to recommend to others?

	Number Small Orgs Using	Percent Small Orgs That Would Recommend	Number Medium Orgs Using	Percent Medium Orgs That Would Recommend	Number Large Orgs Using	Percent Large Orgs that Would Recommend
Convio	23	78.26%	28	75%	33	69.7%
CiviCRM	77	94.81%	33	90.91%	6	66.67%
Salesforce	48	85.42%	41	95.12%	16	93.75%
Kintera Sphere	18	55.56%	23	47.83%	16	50.00%
Blackbaud netCommunity	14	42.86%	22	50.00%	13	84.62%
Democracy in Action	26	76.92%	23	95.65%	7	71.43%
Organizer's Database	33	90.91%	13	61.54%	3	66.67%

CRM Grades - Overview

Respondents were asked to assign grades to CRM systems that they are currently using, or have used in the past.

Grades were generally consistent for each vendor across the five categories and were fairly high. Of the 13 systems graded below, only two received a majority of scores in the C range.

The average score for After Sale Support, which was one of the most valued attributes, was a B+. The two most commonly cited complaints about support were poorly trained tech and customer support staff and lack of documentation.

The average Usability score, the other top rated attribute, was also a B+. Respondents frequently noted that usability was uneven, with some modules being more user friendly than others.

The category that yielded the most A's, three, and the only reported A+ was "Value for Price Paid" and "Time Required to Implement." It is important to note, however, that the four systems that received those grades are either free to download, or in the case of Salesforce, donated to nonprofits.

Note: We looked at the 'Other' responses and separated out the 30 respondents that reported grades for a custom system. These grades were removed from 'Other' and are reported in the 'Custom' category. Grades for custom systems were among the lowest reported.

After Sale Support

The two most commonly cited complaints about support were poorly trained tech and customer support staff and lack of documentation.

CRM Grades

Response size must be taken into account when considering grades given. CRM systems with fewer than ten responses were omitted from this section of the report.

Question: Using the scale below, please assign [CRM] an approximate grade based on its quality and reliability, after sales support, ability to deliver on promises and deadline, usability, and value.

	Quality and Reliability	After Sales Support	Delivers on Promises and Deadlines	Usability	Value	Number of Responses
CiviCRM	B +	B +	B +	B +	A	100
Convio	B	B	B	B	B	88
Kintera Sphere	B	C +	C	C +	C +	50
Salesforce	A	B +	B +	B +	A	50
AdvSol iMIS	B +	B +	B +	B +	B +	22
Avecra netFORUM	B	B	C +	B +	C +	21
Blackbaud netCommunity	B +	B +	B +	B +	B	25
Custom	C +	C	C +	B	B	30
Democracy in Action	B	B +	B	B	B +	28
Organizer's Database	A	B +	B +	B +	A +	36
Antharia OnView	B +	B +	B	A	B +	19
Sugar CRM	A	B	B +	B +	A	18