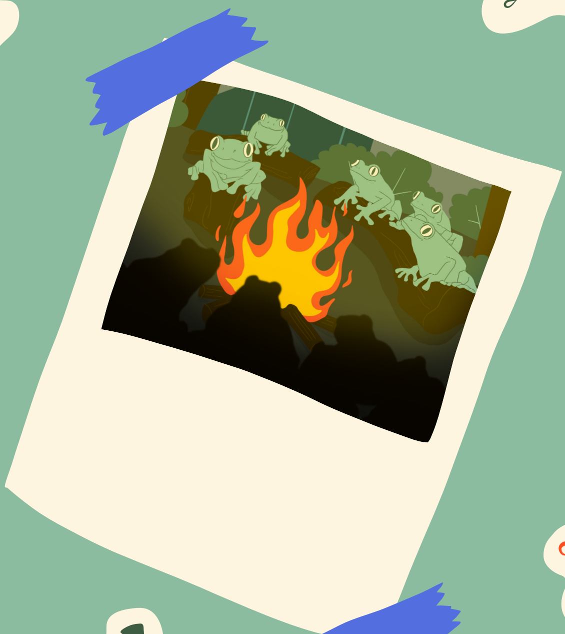
How to Evaluate and Pitch Tech Tools for Your Nonprofit

A CAMP IMPACT WORKBOOK BY POND



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Welcome to Camp Impact!

Let's face it: taking on new tech to solve our problems and support our goals can be challenging, even in our personal lives. But with their lean teams and limited budgets, nonprofits often find themselves especially intimidated when it comes to taking their pick from a plethora of options.

And whether a tech solution is uncharted territory or somewhat familiar, the rapid pace at which it's constantly changing requires a commitment to continuous learning and adaptations by the people who rely on it in their day-to-day work. And no matter which option you choose, there's always a cost. That said, when you discover the right fit, the ROI can be incredible, especially when you can let automation handle administrative tasks and donor touchpoints for you.

The most comforting aspect of this entire process? You don't have to go at it alone. From Pond's supportive platform to nonprofit tech consultants, there are plenty of best practices and experts you can lean on to find the software solutions that will best fit your organization's needs. And why not accept the help? You're busy saving the world each day, after all!

Our advice? Start here and now at Camp Impact and embrace all that Pond has to offer — beginning with this workbook.

Part 1. Forget the Demo – Start with Your Goals and Challenges

Sometimes "new" doesn't equal better. Before you swoon over a shiny, new system, you need to take note of the following:

Why do you need a new system? What problem(s) are you trying to solve through this tech purchase?

What goal(s) do you hope to achieve by making this tech purchase?

What type of training and professional development will your staff need to make the most out of your tech investment? (Not sure which training exercise is most effective? Once you've answered the questions above, a consultant or tech provider can use your answers to help you choose the proper training to achieve your goals and support your processes.)

Part 2. Tackle Change Management By Making It a Team Effort

Take inventory of what you have. Note all the tools your staff uses, what they're used for, how much they cost, and who uses them in the section that follows this inventory breakdown.

GRADE THE TOOLS.

Chances are, you can Kon Mari your tech stack and end up with only the tools that bring you joy. First, assign a grade to each: A, B, C, D, and F. Ditch the Fs and Ds and continue to the next step.

IDENTIFY REDUNDANCIES AND GAPS.

Now you can take your somewhat trimmed list and really pare it down. For example, if your organization has different departments working on multiple email systems, evaluate which one's best and move everyone to the same platform. (Not only will this save money on subscription costs, but all departments will be able to easily access which communications are going out when and to whom, along with how they perform.) In the same way, if you lack a peer-to-peer fundraising solution and your development team needs it, you'll want to explore your options.

CONSIDER YOUR DATA FLOW.

How is information moving between your tech solutions? Rather than settling for, "The Development Team uses this and the Administrative Team uses that," look at your nonprofit's technology stack as one ecosystem that works together, empowering your team to work efficiently and collaboratively with access to the same real-time data.

YOUR TECH STACK INVENTORY

TOOL/SOFTWARE	GRADE	WHO USES IT?	NOTES

Part 3. Streamline Your Software Search Process with a Pre-Demo Game Plan

Before scheduling a slew of demos, limit your pursuit to the type of solution(s) that will serve your team. Consider doing the following pre-demo tasks to ensure you're ready:

Develop a list of requirements, nice-to-haves, and dealbreakers.

This is where the team-oriented activities listed in Part 2 will come in handy. Use your organization's challenges, goals, and technology gaps to help you compile this list. You may even want to prioritize requirements so it's easier to rank systems that check all the boxes but may offer more robust functionality in one area over another.

MUST-HAVES	NICE-TO-HAVES	DEALBREAKERS

Ask your peers what they use.

Talk to your peers at other organizations for an unbiased viewpoint. A fundraiser friend will be happy to tell you if they're pleased with the product, what they like, and of course, what they find challenging. They may even allow you to swing by and see how they use it for yourself.

PEER RECOMMENDATION 1

PEER RECOMMENDATION 2

PEER RECOMMENDATION 3

Narrow your search by scoping out reviews.

Look to online review sites and nonprofit tech consultants to help you do your homework on comparing and contrasting the functionality and capabilities of the many systems available to you.

TOP CONTENDERS BASED ON REVIEWS

FIRST PLACE:

SECOND PLACE:

THIRD PLACE:

Choose no more than four products to demo.

Many systems do a lot of the same things, so there's no need to go on an epic exploration to find the perfect fit. Instead, look to the exercises you and your team completed above to guide you in which companies you'd like to give your limited time to.

PRODUCT 1:

PRODUCT 2:

PRODUCT 3:

PRODUCT 4:

Get everyone in the game.

Gather questions from everyone so you can get all the answers in one swoop, and record the demo so everyone on the team can access the same info and pitch in to the evaluation process. Hold a brainstorm and list your questions in the space provided.

QUESTIONS FOR DEMO

Part 4. Make Your Relationship with the Sales Rep Work for You

Just like any healthy personal relationship, the key to a successful business relationship is communication. Prep the salesperson by sending them critical information before your demo, like:

- **The goals you want to achieve with their solution**
- **The problems you're seeking to solve via tech**
- **Your needs (record numbers, users, features, etc.)**

If there's not time to discuss specifics at the demo, you may want to set up a time for a pre-demo conversation so they can best serve you. During your demo, be sure to get the following for your post-evaluation with your team:

References

The salesperson should provide you with at least 2-3 references to consult. These references should be able to provide critical insights into the onboarding process, training, functionality, and ease of use. Make sure these organizations mirror your organization's size and needs.

In addition to the carefully curated references the rep gives you, look at organizations listed on the software vendor's site and see if they're using that company's features. If you happen to see a nonprofit using their donation forms or peer-to-peer features, do a little sleuthing to get their info and reach out for their unbiased opinion.

PRODUCT	REFERENCE CONTACT INFO

Feature availability

Come with a checklist so you can make sure the system has the features you need. If the rep says a feature will be available soon, consider it non-existent. Tech timelines change constantly, so don't bet on any features or functionality that don't already exist.

The company's vision

With nonprofit tech acquisitions on the rise, it's important to know a company's plans for the future. You don't want to invest in a system today only to have to transition to another one a few months down the road when the company is sold.

These days, many salespeople will be transparent if their product isn't a good fit. That's why it's so important to communicate your needs and goals so they can partner with you in helping you make the best decision.

Finally, don't forget that sales reps are here to serve you. If they're reaching out too much, set boundaries and let them know you'll respond when you're ready. Remember, you're in the driver's seat, and you can change your timeline, change your mind, or bail whenever you like. Listen to your inner "belly buzzer." If it doesn't feel right, don't do it.

Part 5. Flex Your Negotiating Skills for a Better Deal

Whether you're a small nonprofit with a squeezy budget or a larger organization with a little more give, scoring a good deal on your tech solutions means you'll have more money to allocate for other critical resources. And who can't use more resources? If you're not sure how to go about negotiating, consider these tips:

Do your homework.

Check the websites of the solutions you're evaluating to see if you can get a feel for their pricing. Have each company's pricing jotted down when you go into your negotiation so you can leverage the price tag in your favor. If you let Software Company A know that Software Company B is offering a lower price, you may just win yourself a price match.

PRODUCT LISTED PRICE 1:	
PRODUCT LISTED PRICE 2:	
PRODUCT LISTED PRICE 3:	
PRODUCT LISTED PRICE 4:	

Be sure to get the bottom-line price.

The package price you see on a website isn't always the final price. From premium features to training packages, the "extras" you discuss during the demo can make a dent in your budget that's more than you can afford. And don't get us started on those transaction fees.

Before you can jump into a negotiation, you need that bottom-line price, so let the rep know you'd like a to-the-dollar breakdown of every cost associated with the system you're scoping - plus transparent pricing for transaction fees for donations and payments made to your organization.

PRODUCT 1 TOTAL PRICE:	
PRODUCT 2 TOTAL PRICE:	
PRODUCT 3 TOTAL PRICE:	
PRODUCT 4 TOTAL PRICE:	

Go with a no-contract solution.

If price is a top concern, choosing a no-contract solution enables you to negotiate more frequently rather than just once a year. Plus, if you're not feeling it and a cheaper, better version hits the market, you can make the switch without having to incur the costs associated with a longer contract.

Be real about what you can afford.

Sales reps want the time they spend with you to result in a close, so be upfront about what it will take to get you to sign regarding costs. There's nothing wrong with saying, "This is what I can pay. If you can provide me with this package at this price, we've got a deal." If anything, they'll appreciate knowing exactly what you're working with.

Ask your sales rep to throw in features or training for free.

Yes, you may as well! It's easier to convince a sales rep to give you more for the same cost than to ask them to decrease the price. That said, if the price tag is a problem, there's no harm in asking for a price reduction first.

If that's a no-go, opt to get more for your money. Evaluate the breakdown of your core system and added features and identify some potential freebies like training or enhanced donation forms. Instead of asking for free add-ons piecemeal, gather everything you'd like and make a single request.

For example, "I can make this happen if you're able to add more training sessions, peer-to-peer forms, and an additional 10,000 records to our package." The worst they can say is, "No can do." Best case scenario? You get some or all of those freebies for the same price.

Be wary of beta testing offers.

Beta testing may seem like a cheap and quick substitute, but you'll spend a lot of time you don't have evaluating features you can't fully use. The experts' recommendation? Go with the finished product.

Part 6. Get Your Board on Board with Your Tech Decision

Sometimes, tech-savvy staff members can feel discouraged by board members or leaders who don't think new tools will make a difference. Rather than pulling back, shift the power dynamics by tapping into the language these leaders understand first, then prove your point later.

For example, let's say you found an email management solution that offers beautifully templated designs, embedded videos, and other features to modernize your marketing. While this may not be a sell for the board, consider the features that address their concerns. Find out where the "no" is coming from and present your ask accordingly.

In this case, rather than talking about design, you can say that the software automates acknowledgements, and in turn, will boost your team's efficiency without having to add new staff. The response from your board? Now you're talking.

A few months later, you can spotlight those design features by showing off the stunning email campaign you created, complete with engagement metrics that will show you knew all along and build trust for when you make the next ask.

In preparation for your presentation, put yourself in the shoes of your board. What will they want to see? What will they want to hear? Use this checklist to assemble your pitch. The best part about this exercise? You've already done the heavy-lifting for your presentation in this workbook!

- [ ] THE PROBLEMS YOU'LL SOLVE BY PURCHASING THE TOOL/SOFTWARE
- [ ] THE GOALS YOU CAN ACHIEVE WITH THE TOOL/SOFTWARE
- [ ] EFFICIENCY GAINS SUCH AS ELIMINATING REDUNDANCIES IN TECH AND TIME SAVINGS
- [ ] REVIEWS AND RECOMMENDATIONS FROM ORGANIZATIONS OF A SIMILAR SIZE
- [ ] DEMO NOTES, ARTIFACTS, AND ANSWERS TO YOUR LIST OF QUESTIONS TO BACK UP YOUR CLAIMS

Remember, We’re Here for You!

From finding peer recommendations to narrowing down your list of potential tools, the exercises in this workbook involve work we do here at Pond each and every day. We’re immersed in a community of passionate nonprofit leaders, top-rated vendors, and nonprofit tech experts who are happy to share their knowledge and experience with you.

If you’re stuck on a section, reach out to the Pond Team at [EMAIL ADDRESS] and we’ll connect you with the right person or information to help you on your journey to finding a perfect tech match for your organization.

Ready to get started? Create a project on Pond and start exploring solutions today.

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