

THE NATURE CONSERVANCY'S TECHNOLOGY CHOICE

This case study on The Nature Conservancy's eCRM selection is derived from the interview with Michael Cervino, Director of Membership Operations at TNC titled 'Technology considerations in eCRM Selection'

Background

The Nature Conservancy (TNC), founded in 1951 is one of the largest environmental nonprofits in the Americas and worldwide. With an annual membership revenue of \$75m and growing membership they faced the dilemma of staying on their current eCRM platform or upgrading to something better suited. Additionally, the organization is 4,000 staff strong around the world with chapters and layers of needs and complexity. So, how did they decide to move from their current eCRM to a new one?



Our partner in this interview is Michael Cervino, Director of Membership Operations at The Nature Conservancy. He's had the fortune of being on multiple sides of the table when it comes to eCRM evaluation and selection having consulting at Beaconfire for many years, worked on the product side and now on the organizational side. Michael's perspective is 360 degree and holistic.

About the Nonprofit eCRM Evaluation

Kathy: How long did the evaluation process take?
Michael...

An evaluation can take however long it takes. For TNC, the process started several years ago as part of Digital Transformation Strategy designed to answer the question 'What is the future-forward technology for consumer and supporter engagement?' What would position TNC well for the next 10-15 years?

The Nature Conservancy's prior technology solution was older, limited and constraining. The evaluation looked at how eCRM tools fit in with the overall digital ecosystem including the website, data analysis, etc. To get the big picture. TNC decided to replace their existing eCRM with one better suited to current needs and future adaptability.



There were additional decisions to be made as a result of the evaluation in regards to a 'path choice' – all-in-one/unified eCRM solution or choosing best-in-breed for different modules. They decided that a unified eCRM was the best solution but in a hybrid sense. They would add supplemental tools if and when needed to accompany the new eCRM – so flexibility was essential.

The Digital Transformation Strategy process took over a year. After that, the eCRM evaluation took only around three months involving over 35 stakeholders and over six prospective vendors in the process. Once they completed the 'path choice', the time from Request for Proposal (RFP) to signed contract moved quickly. Michael notes, this was pretty fast in his experience.

Request for Proposal and Requirements Matrix

Kathy: Did you use a requirements matrix?

Michael...

Yes, with Beaconfire, the Digital Transformation Strategy resulted in functional requirements and a requirements matrix. This informed the Request for Proposal (RFP). In the RFP, they provided rules and regulations for the process, a high-level summary of needs, specific questions for vendor background – especially integration and sustaining donor migration which was a pain point on the old eCRM. In addition to the RFP, they provided the requirements matrix and asked the vendor to complete it with rankings and details.

It was about needs but also selecting a long term partner that will listen to needs, respond and grow with TNC.

Kathy: Would you suggest an RFP for any organization evaluating a nonprofit eCRM?

Michael...

That depends on if there are board or organizational requirements for selecting business partners. For TNC, contracts over a certain dollar threshold require an RFP or RFB (Request for Bid). If it's not mandated, decide how much buy-in and support you want for this new selection. Then design your process around that.

Not sure where to start with a Requirements Matrix or RFP?
No problem, our planning guide has free templates at

ENGAGINGNETWORKS.NET/ECRM



Narrowing the Field of eCRM Vendors

Kathy: As you narrowed the field, what did the team feel was very important to have?

Michael...

We designed this around an apples to apples comparison. The key that drove TNC was identifying vital decision criteria. Features, pricing, maturity and depth of functionality were certainly critical.

Each vendor got the same set of questions, then TNC would follow with unique questions if appropriate. All vendors received a specific demo script. Additionally, they asked each stakeholder to provide their most important use cases so that the vendor could respond to each. During the demo, TNC asked specifically for more product focus and less presentation – show us don't tell us. This distinguishes real from unreal.

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Really give yourself time for the demos. TNC used a multistep process, ½ day to show product plus 2 pre-scheduled follow-up sessions for more questions. Then, also, subgroup meetings were scheduled as needed. TNC communicated that up front to the vendors to set expectations about time needs from the vendor.

*– Michael Cervino, Director of Membership Operations
at The Nature Conservancy*

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Future Proofing for eCRM Selection

This was perhaps the most important part of the decision. While TNC wanted to know that current needs were met with a new eCRM solution, they wanted to set themselves up for future success. They knew going in that nonprofit eCRMs are not wildly different. For TNC, they needed to look at now – and a year from now. What differentiated these potential eCRMs in their mind?



- How can they influence the product roadmap?
- How willing is the vendor to commit to supporting needs?
- Under the hood, they looked at possible integrations with data and third party vendors for needs like address verification and fraud protection.
- They looked at architecture and flexibility to build onto the eCRM down the road.
- What is the demonstrated product development? Have things been changing or going stale? They wanted a tool with rapid development and plans to grow and adapt.
- Resourcing and financing were also an important part of the decision. Is the company financially stable and providing enough resources and staff to support an enterprise client like TNC?

Decision Factors

Michael identified several top decision factors in TNC's choice.

- Platform flexibility and maturity – how flexible is the platform and are the modules built out enough to support current needs
- International/global component to the product – can it support multi-language and multi-currency as well as parent/child account options for chapters and international teams
- Real sense of quality support and roadmap, the temper of company and a feeling of trust – essentially, did the vendor feel like a trusted partner who would be there for TNC



The Nature Conservancy's final decision was Engaging Networks, for many of the factors identified above as well as the full suite of needed flexible modules.

Selection Tips

Kathy: This process can be daunting. Do you have any suggestions or thoughts to pass along to anyone in the process of evaluating eCRM solutions?

Michael...

1. Have a structured review. This can be as simple as a requirements matrix with ratings and comparisons to guide your decision. It also helps establish the prioritization of the features and functions you need – what matters most. Have that conversation early in the process.
2. Whether you do RFB or RFP, whether you only talk to 2 or 3 vendors, push on the product, what it can do, where it's been and where it's going.
3. Follow your gut if you think it will or won't work for your organization. Trust that.

Are you planning an eCRM change or in the process of making a selection of your own? If so, check out our guide for Planning for a nonprofit eCRM Change at **engagingnetworks.net/ecrm**.