

iDonate®

# Evaluating Tech for Organizational Growth

How to have the best experience  
finding the most impactful tools

April 2023



The image shows a laptop and a smartphone displaying the iDonate dashboard for the Child Hunger Fund. The laptop screen displays a dashboard with the following data:

- Total Revenue:** \$845,200 (↑ 12% This Month)
- Total Donations:** 5,523 (↑ 6% This Month)
- Donors:** 3,572 (Total Donors)
- Recurring Donors:** 3,185
- First-Time Donors:** 387
- Active Campaigns:** 6
- Revenue By Channel:** (From Jan 1st - Jan 31st 2021)

The smartphone screen displays a donation flow screen with the following information:

- Child Hunger Fund**
- Giving Food to Those in Need**
- With your support, we bring hope, dignity and self-reliance to families and communities around the world.
- Donation Options:** How much would you like to donate? (\$25, \$50, \$75, \$100)
- Donate Once** / **Donate Monthly**
- Your \$75 donation provides 55 Meals to kids in need!**
- Payment:** Credit, Debit, echeck, Google Pay, Apple Pay
- Billing Info**

## Agenda

Set the stage

Pre-evaluation

During evaluation

Post-evaluation

Wrap-up

**What has been the best buying experience you've ever had?** (car, house, clothes, CRM, etc.)

**What has been the worst?**

## Wouldn't it be nice to just swipe right on tech?

### 3 Key Rules of engagement:

Transparent Communication

Respect

Kindness



**Samantha, iDonate**

I love helping nonprofits problem solve and make a greater impact! Former fundraiser, P2P marathoner and dachshund lover.

*Solving for: A/B testing, digital fundraising, giving forms, revenue growth, efficiency*



**Dan, CYDC**

No fishing photos here—fundraising leader, professional networker and relationship builder. Let's grab a bourbon and talk shop!

*Seeking: events, good deals, CRM, dashboards*



**Travel Mode: Visiting my grandkids in NC**

Part 1

# Pre-evaluation

Let's get our ducks in a row before starting a conversation.



## Goals of your sales reps

- **Discovery: Education vs. Active Search**
  - **Goals/Challenges**
- **Industry-wide Challenges – benefit of seeing many nonprofits**
- **Good fit**
- **Understand internal power dynamics**
- **Develop a champion**
- **Joint Execution Plan**

<b>Key Stakeholders</b>					
<b>iDonate</b>			<b>Dan's Nonprofit</b>		
Account Executive	Sam, sshirley@idonate.com		Project Lead	Dan, ddaniel@cydc.org	
Sales Engineer	name & email		Technical Lead	name & email	
Executive Sponsor	name & email		Executive Sponsor	name & email	
Due Date	Next Steps	Type	Stakeholders	Status	Notes
<b>Discovery</b>					
3/15/2023	Intros & Goals for Buyer Company	Meeting	DOD, User, Champion	Complete	went great--scheduled demo
3/20/2023	Evaluation Process	Deliverable	Champion	In Progress	
	Pilot Planning	Meeting		Not Scheduled	
<b>Pilot</b>					
	POC Kickoff			In Progress	
	Technical Checkpoint	Meeting	IT team	Complete	
	Results and Review	Meeting		Not Scheduled	
	Business Recommendation	Deliverable		Scheduled	
<b>Partnership Formalization</b>					
	Contracting Kickoff	Meeting	CFO		
	Redlines & Legal	Task			
	Signatures	Task			
<b>Onboarding &amp; Setup</b>					
	Onboarding Kickoff	Meeting			
	Onboarding Steps	Task			
	30 Day Check-in	Task			

## What to consider in advance

- **Tech Audit**
- **Budget**
- **Initial Research**
  - **G2Crowd, TechSoup, TogetherSC**
- **Strategy**
- **Procurement/Stakeholders**
- **Personnel – evaluation & beyond**

# RFP ~~Do~~s and Don'ts

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**Do you know what your  
procurement process is?**



Part 2

# During evaluation

We're all in—LET'S GO! How to evaluate tools when there are so many shiny objects to distract you.

**Trends**

**Present**

**Top 5 Q's**

**IT Must Haves**

# Trends



# TOP 5

# Qs?

1. **Biggest challenges**
2. **What would happen if...?**
3. **Biggest fears/concerns**
4. **Organizational change**
5. **Priority**

# Be Present





## **IT Must-Haves**

**Do not pass go unless these boxes are checked:**

- **PCI (credit card) and SOC-2 (data encryption) Compliant**
- **GDPR (General Data Protection Legislation)**
- **Open API**
- **Native integrations and/or CSV upload**
- **Embeddable forms**
- **Tokenization**
- **Cloud-based, works on all browsers**
- **ADA compliant/translate (if applicable)**



**Onboarding  
& Migration**

**Demo Site**

**Top 5 Q's**

**References**

# Onboarding and Migration



# TOP 5

# Qs?

1. When to include C-Suite
2. ROI
3. Efficiency
4. What needs improvement
5. Customer Support

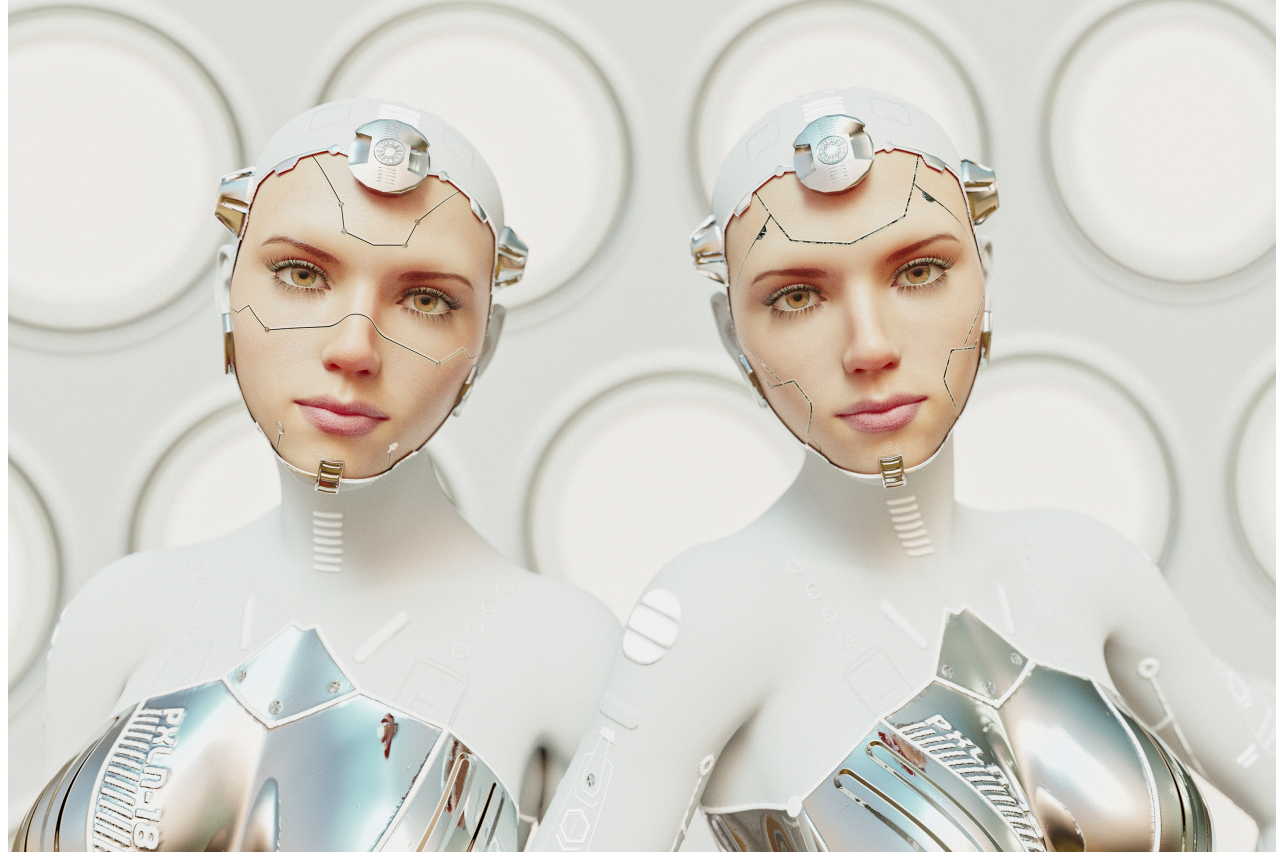


# Demo Site





# References



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**1) Where do you usually get stuck in a purchasing decision?**

**2) When have you been successful advocating for what you need?**

Part 3

# Post-evaluation

You've decided on a tool. Now what? Procurement, implementation and beyond.

## Contract Review/Negotiation

- Terms
- Liability
- Price guarantee
- End of month/quarter discounts
- ROI
- Breaking contract





## Now what?

- Quarterly Business Reviews
- Ongoing Customer Support
- Implementation
- Third parties
- Integrations
- Internal/External Accountability





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**What is one action you will implement to impact your current/future toolset?**

## If nothing else...

1. Internally be clear about the objectives you are trying to achieve.
2. Externally be communicative about your procurement process and be open to new ideas.
3. Together you can connect the dots to discover if it's the right fit for you.



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