

*This is a report prepared by Scott Williams, [scott.t.williams@gmail.com](mailto:scott.t.williams@gmail.com), for a software selection client in June 2016. I am sharing it with their permission. Identifying info has been removed at their request.*

## **XXXXX Data System Comparison report**

XXXXX wants to improve their constituent management. Their core need is to improve the efficiency, trustworthiness, and access of their constituent management. This data system search has also looked at the other systems and processes throughout the organization, to find a system that will allow most of the organization's functions to be consolidated in the new system.

These other organizational needs are:

- membership tracking and billing
- event management, including ticketing for paid and free events
- tracking of corporate conference sponsorship
- integration with Sharepoint to manage member contacts' access to committee materials, or a parallel system to provide committee materials to committee members (*note that Sharepoint integration does not seem practical with any of these systems, and in every case a separate member portal is the proposed solution.*)
- easier updating of the website's member directories
- receiving award or committee application forms
- tracking of correspondence/calls with member contacts
- mass-email functions, or easy integration with a mass email program, with ability to blast to committee and other groupings of contacts

In order to meet these organizational needs, we looked at three low-cost, cloud-based constituent management systems: Salesforce, NetSuite, and Z2 Neon. A basic visual comparison of the systems is below, with a more detailed text report following. A \$ indicates that the functionality is available at an additional cost; most often via an app. These additional charges are figured into the projected cost unless otherwise noted.

## Basic comparison of CRM systems

	Salesforce	NetSuite	Z2 Neon
Basic contact management, membership and payment tracking	<i>All systems include basic contact management, including the ability to organize contacts by role and committee, and the ability to track incoming check payments for membership or sponsorship</i>		
Event management, including ticketing for paid and free events	\$	\$	Y
Committee portal	\$	Y	Y
Member directory	\$	Y	Y
Email blast	\$	Y, up to 10k/month	Y, up to 20k/month
Application forms (for awards and committees)	\$	Y, but requires some technical knowledge to use	Y
Tracking of correspondence/calls with member contacts	\$	An outlook plugin may work for you, for additional \$ (cost not figured in)	Via bcc on individual emails
Support	\$	\$	Included
Est. implementation	\$2,750 basic setup and data import; \$500-\$1500 for apps	\$5,000 includes event implementation	\$1,050
Licensing (annual)	\$360 basic licensing; \$4,926 for apps	\$3,788	\$2,088
Est. Support (annual)	\$1,100	\$2,000	\$0
Est. 1 year cost	\$10,636	\$10,788	\$3,138
Est. 3 year total	\$23,408	\$22,364	\$7,314
Est. 5 year total	\$36,180	\$33,940	\$11,490

# Salesforce

[Salesforce](#) is one of the biggest cloud-based database systems, and they have a generous donation program providing 10 free licenses for their basic cloud database to nonprofit organizations.

## Advantages:

- Because of the low cost of entry, Salesforce provides an easy way to get basic contact management needs handled, with room to grow into other functions.
- Salesforce is a highly configurable environment, and it can be easy to add data fields and business logic without much technical know-how.
- Salesforce's model involves an app marketplace, with hundreds of applications to handle different member-facing and internal tasks. For any given data need, you will have several customer-reviewed choices of solutions.
- Salesforce also has a robust developer community, and an active non-profit users group, giving you lots of choices when you need support.

## Disadvantages:

- While the basic cost of entry is low, the licensing fees for apps can add up quickly - the proposed solution chooses from the most affordable apps, but has the highest total cost of ownership after the first year. You can, however, consider the value of the various apps independently, and choose not to implement all of them, or other solutions may present themselves.
- When assembling a solution from various app providers, your related data may not be well integrated - payments for event sponsorship, event registration, and membership may end up all tracked separately.

## Proposed solutions:

**Events, committee portal, membership directory, application forms:** These needs are met by different apps in the [Soapbox Engage suite](#), developed by the local company PicNet, who have been developing low-cost solutions for the nonprofit sector since 2001. Their solutions are by far the most affordable solution to most of these problems; and user comfort with their apps is crucial to meeting XXXXX 's needs at the current estimated price point. The value of these solutions, and their integration with your database, can be considered relative to current systems.

**Email blast:** The [Soapbox mailer app](#) is a well reviewed, low-cost mailer which works directly from within Salesforce; there are many other mailer apps that work within or sync with Salesforce. This is also a PicNet product.

**Outlook integration:** [Cirrus Insights](#) works with Outlook to provide tracking of Outlook emails in Salesforce as well as contact lookup, which will make it easier for users to click

through to Salesforce to keep contact info current, and to understand XXXXX's relationship with their correspondents.

**Support:** Salesforce provides minimal support within the donation package, though the apps are supported within their licensing agreement. In figuring the ongoing costs, I've included 10 hours/year of paid support, at \$110/hour. There is also considerable info online, both company-provided documentation and independent articles and message boards. Solutions to many challenges can be found through searching the web.

**Implementation:** I've included 25 hours at \$110/hour for data import and setup of any needed custom objects and processes. Implementation and support can be provided through Vendor.

## Netsuite

Client Contact is currently using [Netsuite](#) to track membership payments, and XXXXX has 5 licenses already as part of Netsuite's donation program. XXXXX also has a relationship with Netsuite partner Social Data Systems, who would be the likely source of implementation and support for Netsuite.

### Advantages:

- Netsuite already has many of the needed functions available as part of their basic package; XXXXX would not need to work with as many outside vendors to put together a solution.

### Disadvantages:

- There is no native event functionality in Netsuite; Social Data Systems proposes to meet that need through custom code.
- Netsuite does not have as robust an app marketplace or developer community as Salesforce; because XXXXX's initial donated licenses were through Social Data Systems, it may be difficult to work with other vendors.
- Netsuite has a seemingly awkward dichotomy between "contacts" and "customers", with contacts being the vehicle for tracking people, whereas if they make payments, they'll also be, independently, "customers."

### Proposed solutions:

**Events:** Social Data Solutions has developed their own codebase for event registration which would be customized to XXXXX's needs. This results in higher up-front costs, though the solution should be a better fit for you needs. There are no ongoing licensing fees, though this savings will likely be offset by the need to pay for support for the functionality. The events functionality rests on an optional Netsuite component called Site Builder, though the Netsuite rep indicated that he believes this is already part of XXXXX's license and won't require additional payment.

**Committee portal, membership directory, application forms, email blast:** These needs are met easily through available components and configurable within the estimate provided by Social Data Systems for implementation. The application forms functionality will require some technical knowledge of HTML, or paid support, to implement.

**Email blast:** Integrated tool in NetSuite allows for up to 10k emails/month.

**Outlook integration:** There is a app for Netsuite that provides functionality similar to Cirrus insights, though the pricing and exact technical requirements have been difficult to obtain.

**Support:** Because of the need to maintain custom code for the event registration module, I have budgeted 20 hours of annual support in projecting the costs of NetSuite.

**Implementation:** Social Data Systems has provided a rough estimate of \$5,000 for implementation, including building out the event registration code. This estimate is based on costs of previous, similar projects, and may change based on XXXXX's exact requirements.

## Neon

Z2 Systems' [Neon CRM](#) is a cloud-based, all-in-one CRM solution. Neon was designed and built specifically for the nonprofit sector, unlike Netsuite and Salesforce, which were designed for the business sector.

### Advantages:

- Neon is, by far, the least expensive solution, both in initial outlay and projected long-term costs.
- Neon offers a single, integrated vendor, unlike the other providers where the platform is separate from the app vendors and solution providers; resolution of problems likely to be more straightforward, and support is included in the licensing.

### Disadvantages:

- Neon is a product, rather than a platform, and will likely provide the least flexible of solutions. Custom functionality to manage committees, for instance, may be limited, and you'll need to work with custom fields or the volunteer management module to create a workable solution, which may seem ad hoc rather than tailored to your needs.
- Neon appears to be built primarily around donation and membership functionality, which XXXXX will probably not use; other modules like event registration may not be as robust, though they do appear to meet XXXXX's tracking needs.

### Solution:

All functional areas of XXXXX's requirements appear to be met in some form by Neon's All-in-one plan, though email integration is limited to the ability to record your outgoing emails to Neon via a bcc: address on the email. Email blast volume is 20k/month.

**Support:** is included in package, along with training.

**Implementation:** I have included the following services in the projected implementation cost (descriptions are Neon's); some additional charges may accrue if you need help from Raffa in preparing and importing your data.

- **Data Analysis (\$300):** This is a series of virtual meetings in which we will go through your data with you and prepare it to be imported. You would be hand delivered an import plan to "press the button" on.
- **Setup Consultation (\$450) -** This is a series of virtual meetings in which we would tailor a setup specific to XXXXX's needs (ie - membership levels, event setup, communication automations, etc). Our experience has shown that the majority of organizations we work with do not need additional time with our Training & Implementation Team after this.
- **Web Template Sync (\$300) -** This is where we would scrape the HTML of XXXXX's website and apply the exact look and feel to all of their NeonCRM forms. The forms will still be branded without this optional item as they will have their logo at the top.