



CRM Needs Assessment Worksheet

Instructions

This worksheet is intended to guide a focused discussion on your nonprofit's CRM needs. It can be used whether you're evaluating your first CRM or considering a switch. Allot approximately 45 minutes for a conversation with leadership, development staff, or board members. Write notes directly on the worksheet, or use it to prompt discussion with your team.

1. Organizational & Fundraising Goals

Top 2–3 fundraising priorities for the next 1–3 years:

- 1.
- 2.
- 3.

What would success look like in 12 months if the CRM is implemented effectively?

Which fundraising channels are you planning to grow? (e.g., grants, major gifts, corporate sponsorships, individual gifts, recurring gifts, events)

How do you currently engage your broader community (donors, volunteers, members, partners)?

2. Current Data & Communication Systems

Tools currently used to manage donor/member data and send communications:

How is the email list managed, and how often is it updated?

Other places contact information is stored (CRM, spreadsheets, finance tools, notebooks):

How does your finance tool (e.g., QuickBooks) integrate with your CRM, if at all?

Challenges with data accuracy, duplication, or access:

3. Key Functional Needs for a CRM

Top 3 must-have CRM features:

1.

2.

3.

Current system pain points:

Who needs access and how frequently?

Are there compliance or reporting requirements (e.g., tax receipts, donor acknowledgment letters) that the CRM must handle?

Should the CRM support broader engagement (volunteer coordination, event planning)?

4. Capacity & Budget Considerations

Primary staff responsible for managing and maintaining the CRM:

Training/support needs for staff and volunteers:

Budget considerations for software, integrations, and training:

5. Success Criteria & Next Steps

Internal organizational concerns about adopting new technology:

Must-have criteria for saying “yes” to a new CRM:

Timeline for evaluation and decision-making:

Anything else to consider as we evaluate CRM solutions: