

NATIONAL WILDLIFE FEDERATION'S BIG ECRM MOVE

How one of America's oldest and largest conservation organizations chose Engaging Networks as their eCRM

Background on NWF's eCRM Selection

Every five years all large software systems used by the National Wildlife Federation (NWF) require a full evaluation to determine if they are still the best fit and cost for the organization. When it was time, NWF's team began reviewing the eCRM software platform they used for integrated online fundraising, advocacy, email marketing and communications. They identified problems that needed solutions, like:

- Rising platform costs
- Business-end usability and experience
- Alignment on business partnership give and get
- Development queue priorities for modern operations and practices



Time to make a change.

Caroline Itoh, Vice President of Strategic Business Operations at NWF, recalls when she and her team began a series of internal meetings to assess both their current requirements and future goals. These meetings included everyone from the production team, NWF's software developers, digital communications, fundraising and advocacy teams, and all of their managers. Caroline said that VP-level officers were also interviewed, to assess higher-level strategic goals the eCRM tools would need to support.

The end product of all these discussions was the compilation of a Request for Proposal (RFP) that outlined each of NWF's specific needs and goals in great detail.

Next, it was time to identify the specific vendors to whom NWF would send the RFP. If their current software wasn't good enough, which was?

In parallel with writing up the RFP, Caroline and her teammates had been researching various eCRM options, investigating emerging trends and reading third-party objective reviews. They were also networking with counterparts at other nonprofits that had recently switched eCRMs to learn from those other organizations' experiences.

Considerable planning went into NWF's eCRM selection process. If you're looking for tools to help plan a similar move, check out our resources and guides at

[ENGAGINGNETWORKS.NET/ECRM](https://engagingnetworks.net/ECRM)

Narrowing the field of Possible eCRMs

Caroline told us the selection process kept coming back to the technical requirements and pricing. (In other words, they kept referring back to an enormous spreadsheet they put together after the stakeholder interviews.) Responses to the RFP and requirements matrix came back from prospective vendors. Using those responses, the NWF team "scored" each prospective eCRM platform, and narrowed the options down to just a few final contenders.

From there, Caroline and her colleagues requested sandbox accounts for each tool they were evaluating. Team members who were in the tools daily were asked to go in for extended periods of time and try to do aspects of their day-to-day jobs in the prospective eCRMS. Not just getting in and looking around, but actually DOING their work. They set up full email sends, created donation forms, and deployed mock advocacy actions.

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**The devil, as Caroline says,
was in the details.**

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The sandbox team evaluated the tools and made recommendations to the evaluation committee, which consisted of some users, managers and vice presidents. After additional presentations by the vendors, and many questions and discussions, the committee again weighed and scored all of the finalists' offerings, to arrive at a final decision. They picked Engaging Networks.



Tipping the scale

When asked, “What made Engaging Networks stand apart?” Caroline has several responses.

Caroline first underscored that choosing an eCRM (and subsequently migrating an enormous amount of data) is a large, costly project for any organization, with many long-term impacts. NWF was able to reduce costs in changing platforms. But, in the end, the decision came down to some of Engaging Networks’ core principals, specifically:

- Innovation
- Partnership

Innovation – Engaging Networks is well known among its clients and agency partners for market-driven innovation. With new releases every 6-8 weeks, Engaging Networks is constantly improving existing tools, addressing client needs and adapting to changes and innovations in the digital space. NWF recognized this ‘innovation’ was very real, and felt that it was critical to their future success.

The emphasis on client-driven innovation (enhancements requested by clients) also made them feel appreciated and heard. That had not been their experience on the previous eCRM.

Partnership – NWF recognized that the Engaging Networks approach is not to “give you the keys to your new toolset, and then leave you to figure it out on your own,” Caroline said. Engaging Networks on-boards and trains new clients, and then after they’ve gone live, checks in with friendly calls or visits to figure out together what will help the client succeed. The Engaging Networks Support Team is well known for promptness, thoroughness and a personal approach to working with clients to resolve issues.

Significantly, Engaging Networks does not subject clients to a bureaucratic “ticketing system” that leaves the client wondering “where they are in the queue” and whether anyone is actually even working on helping them with their problem. These qualities gave NWF the feeling that Engaging Networks would be a real partner in NWF’s future success. This was not something that they could easily capture or score in their Technical Requirements sheet, yet it became a very important data point, Caroline Itoh said.



Sage advice

Caroline, who has done several major eCRM selections and migrations in her career, was asked what guidance she would give other nonprofits thinking of taking the plunge and selecting a new eCRM platform. She fairly quickly came up with three key pieces of advice.

- Heavily involve stakeholders who will use the new tools in your entire process. Don't make this a management-only, top-down decision.
- Build out a thorough list of technical requirements and let that list guide you through the process. It will keep you focused on your actual needs and goals.
- If you are sandbox testing, make it count. Have your team go in and do their actual daily jobs in the new tools, to see how quickly they can learn the new platform, and to verify that the new tools will actually help them in their jobs.

Accolades

The National Wildlife Federation is the United States' largest private, nonprofit conservation education and advocacy organization, with over six million members and supporters, and 51 state and territorial affiliated organizations. Many thanks to Caroline Itoh, Associate Vice President of Strategic Business Operations, for her time and thoughtful responses which we hope will help any nonprofit in the challenging eCRM selection process.