

CRM Replacement Demonstration and Evaluation

This Organization and its partners are looking forward to the demonstration of CRM functionality. **Please carefully stick to this script.** Time periods will be enforced, meaning the team expects to see each of the cases specified here. Where additional time is available, please present relevant content per section; this will allow our team members to know when they must be part of the demonstration. Also, note that team members will be scoring each section using a 3-0 scoring. (3=amazing solution; 2=acceptable; 1=concerning; 0=unacceptable; n/a=not scoring)

Time	Topic	Direction & Use Cases to Demonstrate	Score
8:30	Introductions	Vendor introductions to the team and introduction of the company	
8:45	Solution Overview	Vendor to provide a broad but inclusive review of the tool(s) that are being proposed, covering the tools from the perspective of the user.	
9:15	Records Management	Vendor to create a record; demonstrate addressee/salutation functions; link record to spouse and employer; illustrate householding/account structures	
9:30	Gift Management	Demonstrate the addition of a \$50,000 pledge from the new record, using front-end and batch tools; add third party payment of the pledge from DAF; demonstrate soft credit functions related to this pledge.	
9:45	Prospect Development	Demonstrate a \$100,000 solicitation plan on that new record, walk team through the stages to the point of illustrating closure of the plan; demonstrate the assignment of new prospect(s) and user tools to manage portfolio; show profile creation options.	
10:00	Break		
10:15	Annual Giving Tools	Demonstrate how users will identify giving segments; Demonstrate Giving Day functionality recommended for the solution; Demonstrate email communication function(s); demonstrate communication preferences functionality; show appeal coding approach.	
10:30	Alumni Relations	Demonstrate on the new record created a membership cycle for Alumni; show how a membership can be bought for another person; demonstrate chapter management tools and resources.	
10:45	Event Management	Demonstrate recommended event functionality but creating a multi-activity event (such as homecoming), illustrating registration, and attendance list/tool(s); mobile options, etc.	
11:00	Partner Integrations	Illustrate how Athletics ticketing could be integrated; Demonstrate ticketing integration; Demonstrate load of gifts from radio station	
11:15	Stewardship	Demonstrate fund management steps for newly created fund; demonstrate annual reporting to donors who established funds; demonstrate dashboard/reporting tools to examine funds; walk through receipting letter and email options; show donor society example	
11:30	Attributes, Etc.	Demonstrate where/how unstructured attribute and notes data would be stored in the CRM. Examples will be provided.	
11:45	Information Delivery	Demonstrate the query, export, and reporting tools delivered with the solution. Specifically, provide a year-over-year comparison and show the extraction of, say, all gifts from FY19; show how to surface Tableau in CRM form.	
12:15	Lunch	Vendor will have a break here; team will discuss morning findings	
1:30	Integration	Demonstrate how finance feed, student feed, and event/email function integration can be accomplished	
2:00	Technical Environment Needs	Walk through the security, environment and other technical details of the solution(s)	
2:30	Implementation Plan	Present a detailed plan for how the transition from RE etc. will be accomplished via a "Month 1, Month 2, etc." work plan.	
3:00	Q&A	Vendor and team will ask questions, look at uncovered topics, and cover next steps	