# Key Questions to Consider When Comparing Donor Management Software

## Cost

* Cost for each tier (up to 1,000, over 1,000, etc.)
* What is the minimum size plan? (minimum plan will hold 1,000 donor profiles, etc.)
* Will my contract cost go up yearly?
* What is the cost for the conversion from your Excel file to their database?
* Is the conversion cost based on the number of donor profiles, if so, what are those breakdowns?
* Cost for customer service options (online only, phone, in-person)

Training options for staff (is this cost included in the package cost or is it extra, is training on-site or at an off-site location, or is it online?)

## contract questions

* What are the contract terms (month-to-month, yearly, multi-year)
* What are the penalties to cancel a contract?
* How many computers can be on a contract or is it unlimited?
* Cloud-based service vs computer based?
* Do they have a mobile site?

## service questions

* What are the back-up policies? (daily, hourly, cloud-based, etc.)
* What is the site security protocols?
* What are the payment processing options (can you use PayPal with their site, can you use your preferred online payment provider, or do you have to use a provider of their choosing?)
* Does the software integrate with your accounting (QuickBooks) and other online platforms?
* Which social media platforms does their software work with? (I have seen some that only partner with Twitter, etc. You want to make sure they will work with whatever platforms you are using)
* Will their service integrate with other software-email marketing services (MailChimp, Constant Contact, etc.) or do you have to use theirs if you want it to talk to your database?
* Can you export ‘all’ of your data anytime you want? If so, what type of file (Excel, etc.)?
* Will I have a dedicated sale/service/tech person?
* Is there an event management option?
* Is there a membership management option?
* Does their service provide NCOA updates for your data? If yes, is that included, or extra cost?
* Is there website integration, or is that an extra cost?
* Will you be able to create letters/mailings and merge with your donor data?
* Does their platform include email design and distribution?
* Does their email design have a Share Bar option?
* Can you capture a ‘mailing list’ with this software where people can sign up for your list, or do you have to add donors/contacts yourself?