

**sylogist**  
mission

# Everything you need to know about CRM Systems

For nonprofits and public service organizations

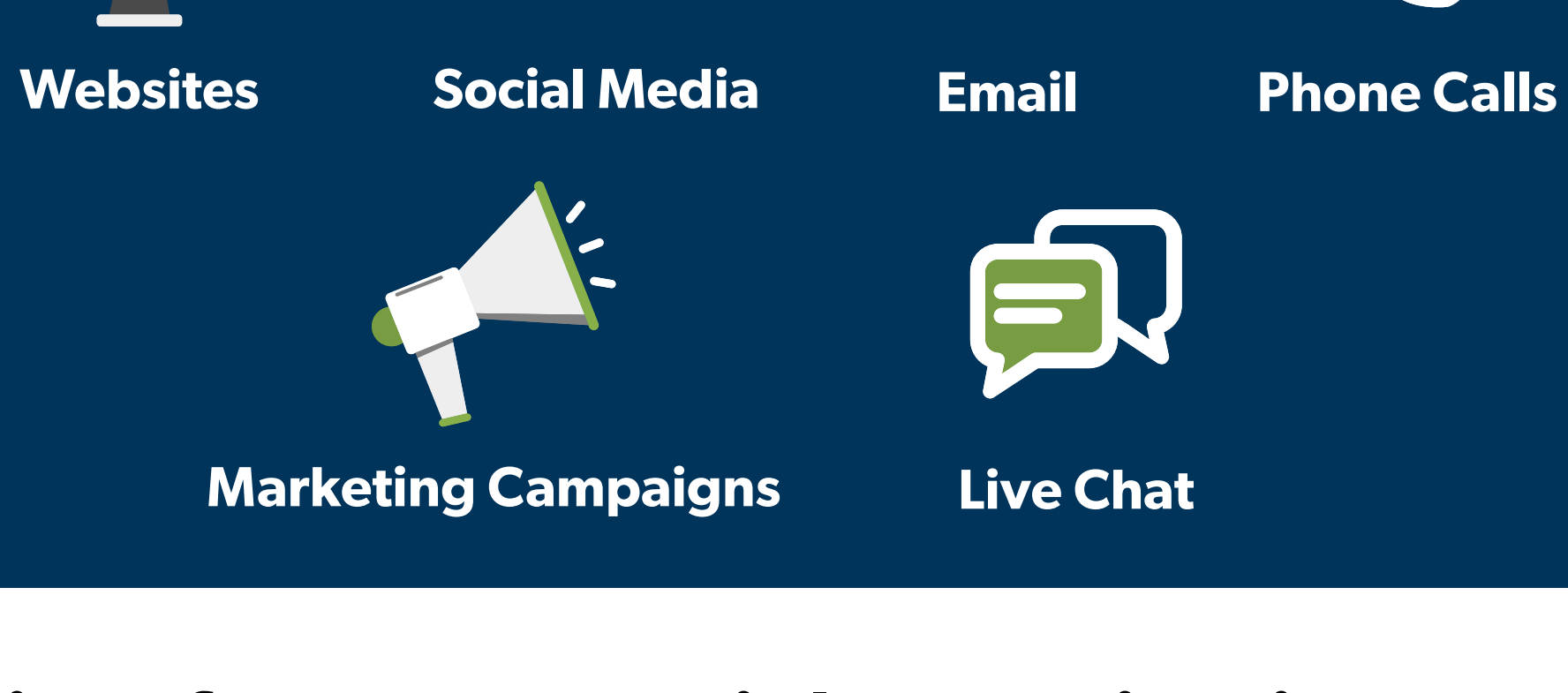
## What is CRM?

### Constituent Relationship Management

The process where an organization administers interactions with constituents, typically using data analysis to study large amounts of data and information.

### CRM System

A CRM System is a software platform that compiles data from a range of channels:



### CRM Systems aren't just for commercial organizations.

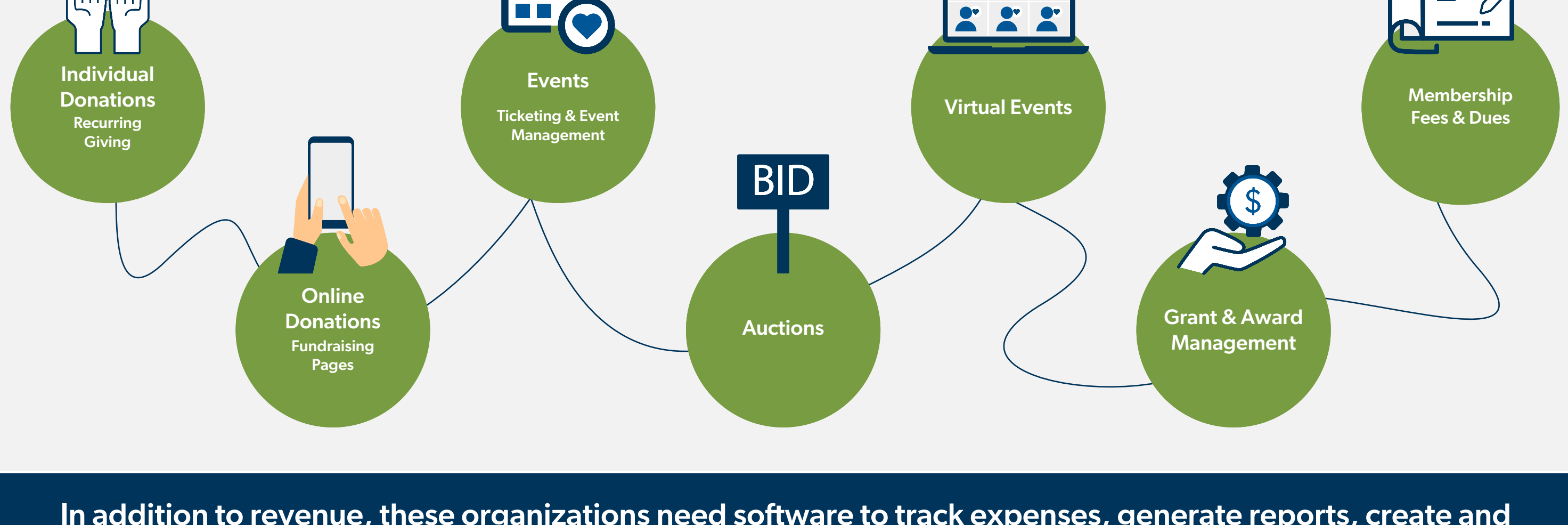
While many people think about commercial operations when they hear "constituent relationship management", nonprofits and public service organizations can benefit from implementing a CRM system.



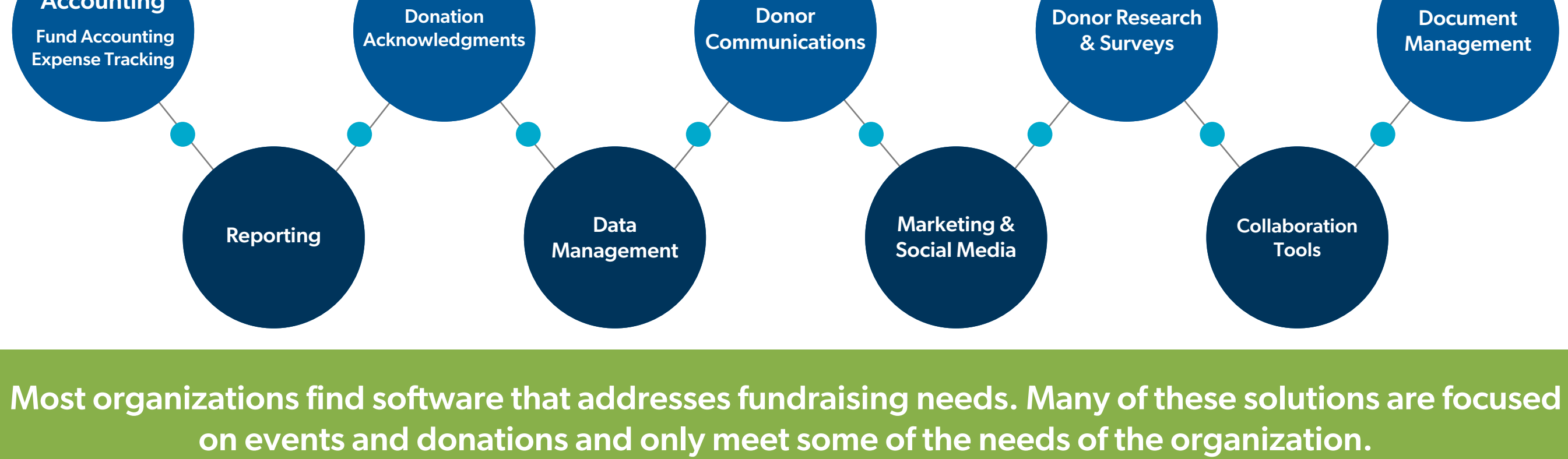
### Why do nonprofits and public service organizations need a CRM system?

#### Nonprofits and public service organizations are complex.

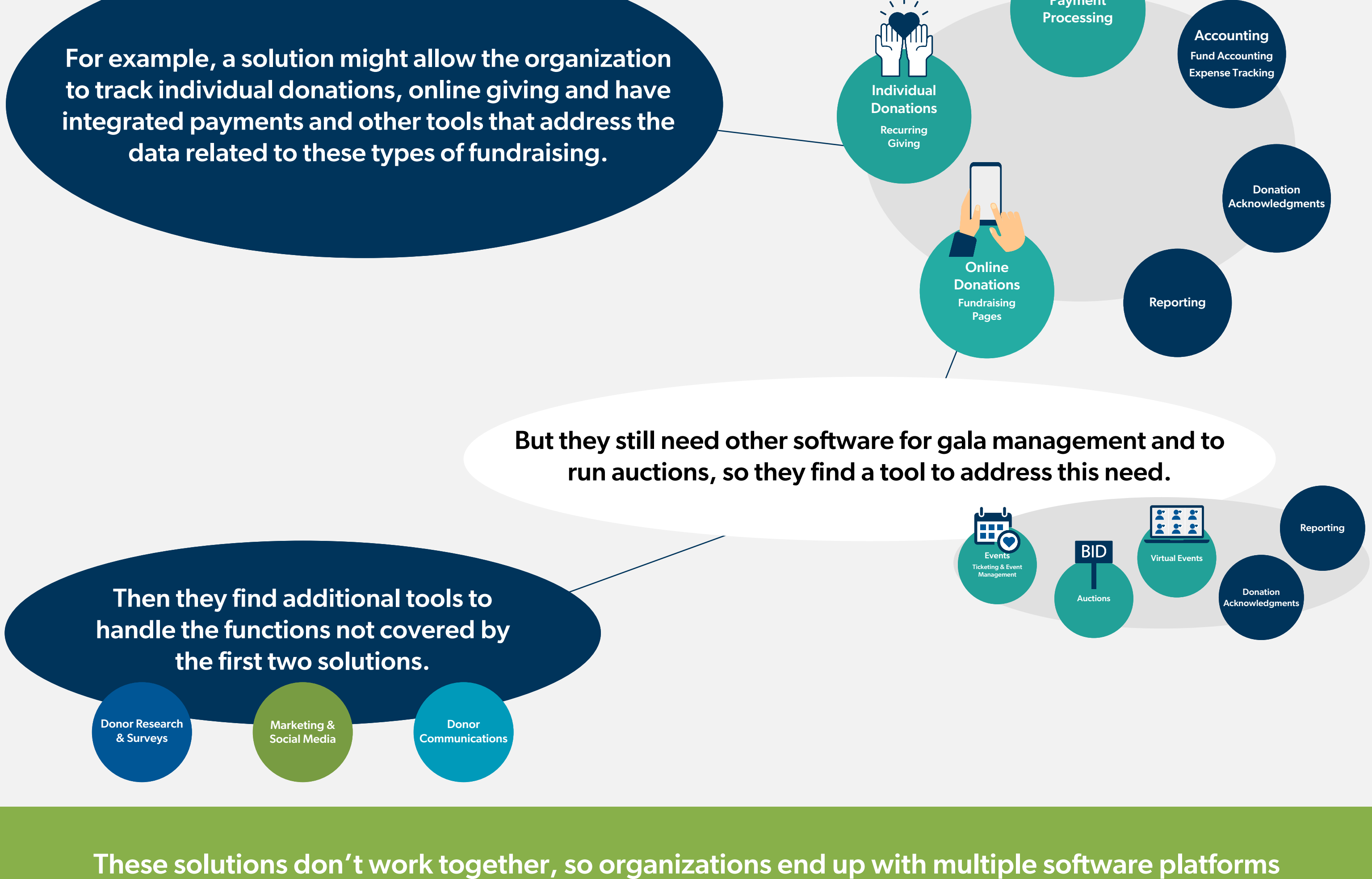
Some focus primarily on fundraising to fulfill their mission, with revenue generated through multiple types of giving.



In addition to revenue, these organizations need software to track expenses, generate reports, create and send donation acknowledgments and tax receipts, allocate certain funds to specific activities and more.

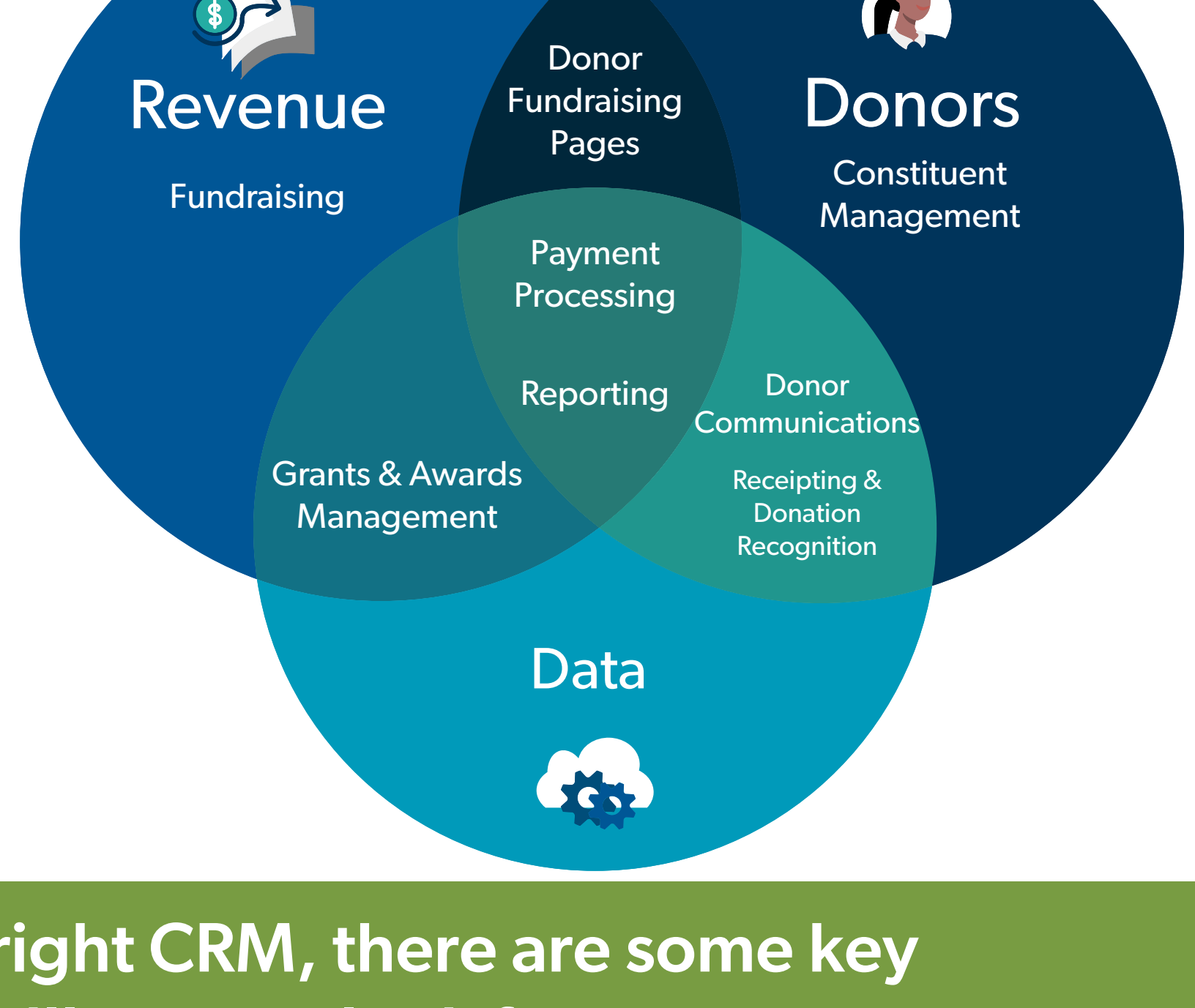


Most organizations find software that addresses fundraising needs. Many of these solutions are focused on events and donations and only meet some of the needs of the organization.



### Streamline Your Operations

A CRM system can streamline your operations to one system of record, with tools to track revenue and expenses, manage donor relationships, and manage data for both fundraising AND donors.



When looking for the right CRM, there are some key features you'll want to look for.



Depending on your organization's needs, you may also look for features to track membership, manage volunteers, manage program activities, and other specific tasks.

### Build better relationships with donors.

Instead of looking at donors based on individual events or programs, you can view the donor's entire giving history, previous communications, and interactions with the donor.

This transforms your process from a reactive, episodic approach to true relationship building.

#### Relationship building helps with:



### Transform all your operations.

- ✓ 360-degree view of donors
- ✓ Centralized home for constituent data across all events and programs
- ✓ Data-driven insights to inform decision making
- ✓ Automate time-consuming tasks
- ✓ Create a scalable program with the ability to evolve and expand over time

Ready to empower your mission and implement a CRM solution?

**sylogist**  
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Donor management & fundraising system built on Microsoft Dynamics 365

SylogistMission CRM is the first and only donor management and fundraising system built on Microsoft, designed for modern, midsize to enterprise nonprofits seeking a single platform to elevate their engagement with donors and efficiency of nonprofit operations.

Learn More at [www.sylogist.com/mission-crm](http://www.sylogist.com/mission-crm)