

## **Is It Time to Change Systems?**

**John H. Taylor**

**February 2019**

One of the most often discussed topics on the Advancement listservs in the past few months has to do with the changing landscape of Advancement CRMs (fundraising databases). There has been a lot of discussions out there – mostly caused by vendors who are eliminating or changing their base products.

This note will not discuss specific vendors or products. No doubt you already know what I am talking about simply because you are hearing from your current vendor. Rather, I want to focus on whether you need to change at all.

Just because a vendor comes out with a new or different version of what you are currently using does *not* mean you must go with that. If I am happy with a product and it serves me well without my having to make accommodations or settle for poor efficiency, then I do not change.

I do not “need” a new car every three-five years. In fact, I tend to drive them until my needs change. I hung onto my last car for 12 years and 250,000 miles and replaced it strictly because we had a child and needed a car that met all the latest safety (and car seat) requirements. The replacement car is now 7 years old and just hit 100,000 miles and I see no reason to swap it out (even though all warranties have expired). In fact, the company no longer makes my model and hasn’t for 3 years – but that’s no reason to get a replacement.

And so it is with fundraising databases. Contrary to what your vendor might tell you – and to dispel the myth propagated on the Internet – there is no “shelf life” for a CRM. And that applies to products that are no longer under “warranty” or are no longer in production. If your organization has stayed current with upgrades and releases to the product and underlying architecture, a replacement might not be necessary for 20 years (assuming it was first acquired in the 21<sup>st</sup> century).

The key to a long life for a CRM is the same as a car: regular routine maintenance and little or no “off-market” modifications. What will break a CRM faster than anything is not using it the way it was designed, not maintaining its interior (data), and adding features it was not originally designed to accommodate.

Regular data tune-ups are mandatory – and those do NOT need to be done by the dealer. Shop around for the best offer, remembering to get at least 3 recommendations.

A bi-annual check-up by a professional is also advised. Get an independent external individual who is current with best practices and processes who can come in and kick the tires. Often a poor-performing CRM is not due to the CRM, but how you are using it.

If you make a minor investment in ongoing routine maintenance of your CRM, you will easily save your organization 6-figures or more. While such a major investment might be called for one day due to regulatory or “safety” concerns, just because you hear on the listservs that “everyone is doing it” does not mean that you need to!