## Smarter Tools, Less Stress:

# 7 Must-Have CRM Features for Nonprofits

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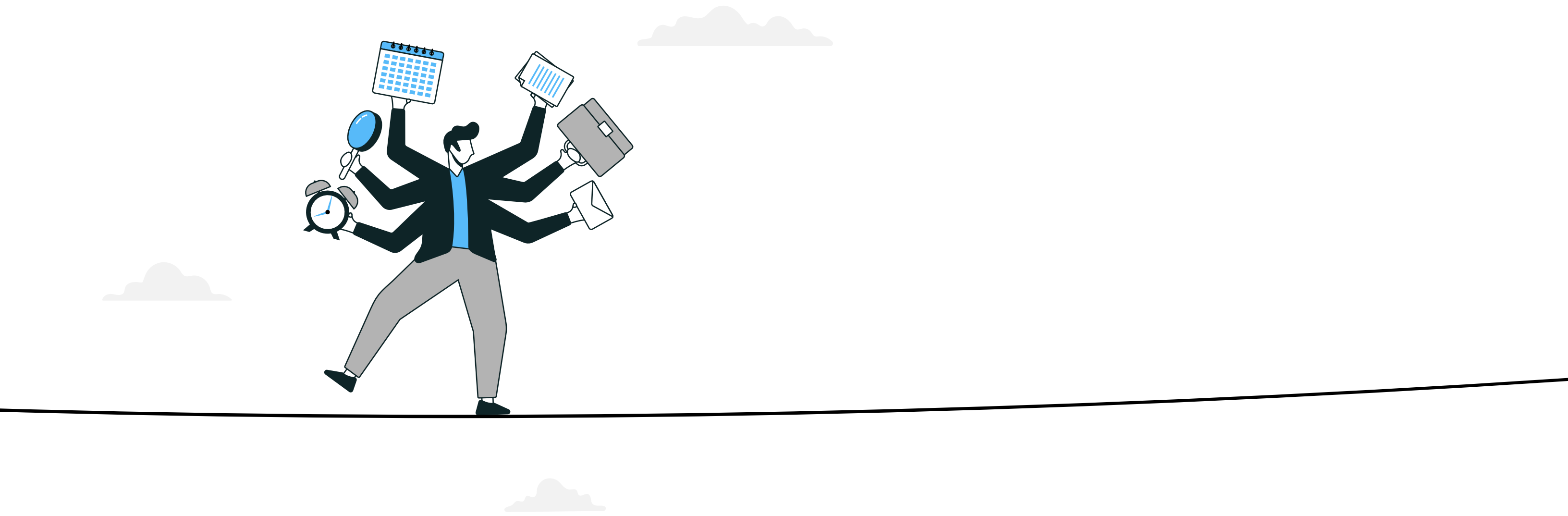

# Fundraising = juggling a lot

## Donations, pledges, volunteers, event RSVPs, and supporter details. But the goal isn't just to track data. It's to use it to grow meaningful relationships and strengthen your cause.

That's why more nonprofits are switching to more intuitive and useful donor management platforms that help you better serve your supporters without adding to your workload.

Here are seven must-have features to look for in a new CRM.

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# Unlimited Constituent Records

Your nonprofit is growing, and that's something to celebrate. The last thing you need is a CRM that charges you more or limits your progress just because you're gaining traction. Your donor management software should support you through every stage of growth without caps on the number of people you serve or connect with.

Look for a platform that allows you to manage unlimited constituent records so you can continue building relationships without worrying about hidden fees, email limits, or data restrictions. Whether it's new donors, returning volunteers, or prospective sponsors, your CRM should grow with you, not hold you back.

**All FrontStream fundraising plans include access to the growth-fueling and 4.4 million-member strong community BiddingForGood.**

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# Donation and Pledge Management

Whether you're collecting one-time gifts, recurring donations, or long-term pledges, your CRM should make the entire process easy to manage and easy to trust for both your team and your supporters.

Look for a CRM that helps you:

**Create branded donation pages and buttons** that embed directly into your website. A smooth and consistent giving experience builds donor confidence.

**Automate the details** such as processing payments, sending receipts, updating donor profiles, and tracking pledges. This helps prevent errors and saves valuable time.

**Track your fundraising in real time** to see how much you've raised, what channels are performing, and how donor behavior is trending. These insights help guide your strategy and strengthen your outreach.

**Forecast future giving** so you can plan ahead with accuracy and have the right resources in place.

When your donation and pledge tools are working well behind the scenes, your team has more time to focus on building real connections and expanding your impact.

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# Relationship Tracking for Individuals, Households, and Employers

Donor relationships are often part of something bigger. A single supporter may belong to a household, work for a company that matches gifts, or be connected to others in your database. Tracking these connections can give you deeper insight into how your community is structured and how to engage more meaningfully.

Look for a CRM that allows you to:

**Segment with more purpose.**

Group donors in smarter, more personalized way and tailor your outreach to what matters most to them.

**Save time by seeing the full picture.**

Instead of managing individuals one by one, track multiple people within a household or employer group to spot patterns, simplify communications, and reduce busywork.

**Make informed decisions.**

With insights into which cohorts are most engaged and what motivates them to give, you can shape strategies that speak to your community and grow your impact.

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# Fundraising Event and Campaign Tools

Your CRM should do more than import/export contacts. It should directly integrate fundraising and campaign tools. The right platform will let you plan, launch, and track events and campaigns without needing to bounce between systems.

Look for a CRM that allows you to:

**Create and manage fundraising events and campaigns in one place.** Whether you're planning an auction, setting up flexible event registration, or launching peer-to-peer or DIY campaigns, having all your tools in one place (and one login) keeps things organized. When your fundraising and donor data live in the same platform, it's easier to keep the data clean and up to date.

### Harness the power of "oneness."

**One set of user permissions. One set of donor records. One accurate source that doesn't lose data and key metrics due to endless, manual exporting and importing.**

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# Easy Volunteer Management

## Volunteers are often the heart of events and programs. But keeping track of registrations, schedules, hours, preferences, and communication can quickly become overwhelming, especially if you're juggling spreadsheets or switching between systems.

A CRM with built-in volunteer management tools can save time, reduce stress, and improve the volunteer experience from start to finish.

Look for a system that allows you to:

- **Streamline scheduling and communication.** Register volunteers, assign shifts, track hours, and send updates all in one place. Bonus points if your platform includes easy tools for background checks and approvals.
- **Make volunteering simple and rewarding.** The easier it is to sign up and get involved, the more likely volunteers are to stay engaged. Look for a user-friendly portal where they can pick shifts, log hours, and access clear instructions.
- **Track engagement in real time.** Ditch the paper sign-in sheets. A strong CRM will help you see who's showing up, how often, and where their time is going without manual data entry.
- **Match volunteers to the right opportunities.** Look for a system that lets volunteers share their skills, interests, or hobbies. This helps you assign the right people to the right roles, creating a more fulfilling experience for everyone involved.

**Because many volunteers are also donors, having both sets of information in one easy-to-access system gives you a complete picture of each person's connection to your mission. It helps you strengthen relationships, personalize outreach, and recognize the full value of their support.**

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# Segmented Email and Mailing Lists

Donors engage for different reasons, at different times, and in different ways. The more you can tailor your outreach to reflect that, the more likely you are to build real connections that last.

Segmented email and mailing lists and help you organize your data in a way that makes your communications more strategic, more personal, and more effective.

Look for a CRM that allows you to:

### Reach the right people with the right message.

Segment your donor list by giving history, location, event participation, interests, and more.

### Personalize your outreach in meaningful ways.

Donors are more likely to respond when your messages reflect what they care about. Segments help you send content that feels timely, relevant, and aligned with each donor's journey.

### Maximize your impact with less effort.

When your messages are more targeted, they perform better. That means higher open rates, stronger engagement, and better ROI—without adding more to your plate.

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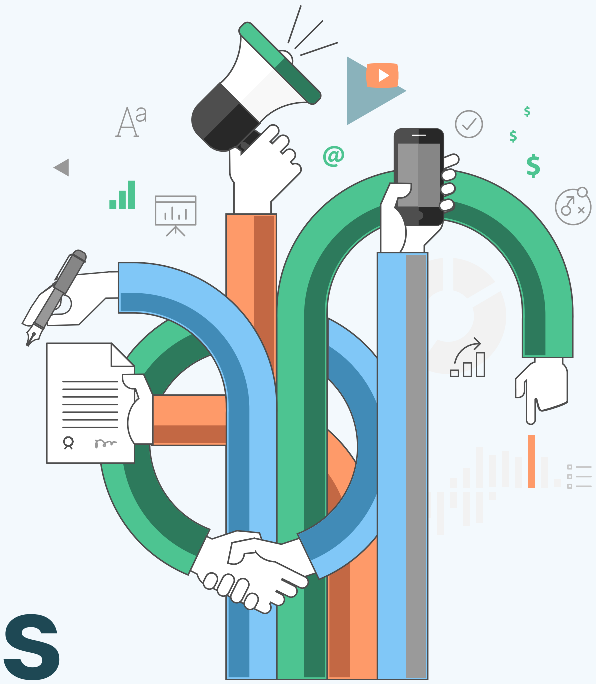
# Software Integrations




Your CRM shouldn't work in a silo. Integrations with tools like QuickBooks®, Constant Contact®, and Mailchimp® can save you hours of manual work and give you a more complete picture of how your donors engage with your organization.

**A CRM with strong integration capabilities** makes it easy to keep systems in sync. When donor data flows automatically between your CRM, email platform, and accounting software, you reduce the risk of errors and free up valuable time for more strategic work.

Integrations also unlock deeper insights by connecting the dots between engagement, communication, and financial data. This helps your team make smarter decisions, fine-tune your strategy, and ultimately increase your fundraising impact.

## BONUS Features to Look for in Your CRM

Even the best core features can fall short if your CRM lacks strong support and data security. These two elements are often overlooked, but they make a big difference in your daily experience and in donor trust

- ### Training and Support

  No matter how user-friendly your CRM is, having access to the right training and guidance can make or break your success with it. Look for a provider that offers personalized onboarding, clear "how-to" resources, an online support library, and access to real humans when you need help. Ongoing support ensures your team can use the platform with confidence, even as your needs evolve.

- ### Security

  Your donors are trusting you with sensitive information, and that trust needs to be protected. Make sure the CRM and payment processor you choose meet the highest standards for data security. Look for PCI Level 1 compliance, encryption protocols, and a provider that takes online safety as seriously as you do. When your system is secure, your team and your supporters can have peace of mind.

# About FrontStream

Over 31,000 organizations have trusted FrontStream to simplify their charity auctions, galas, peer-to-peer events, and online fundraisers.

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