IS LUMINATE CRM RIGHT FOR YOUR NONPROFIT?

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Part of Blackbaud's Luminate Suite, Luminate CRM is a cloud-based constituent engagement platform designed to help nonprofits better engage their donors, expand their communication efforts, and grow their online fundraising strategies through a variety of channels.

Luminate CRM is a unique tool with a number of powerful features, so it's no surprise you'd consider implementing this platform into your nonprofit strategy. But before you decide it's the right donor management system for your organization, you should make sure you're completely familiar with how Luminate CRM works.

To help answer any questions you may have about Luminate CRM, we've put together 6 key elements you need to consider before purchasing this product:

1. **LUMINATE CRM WORKS WITH SALESFORCE.**
2. **LUMINATE CRM OFFERS ROBUST FEATURES.**
3. **LUMINATE CRM WILL REQUIRE CUSTOMIZATION.**
4. **LUMINATE CRM CAN INTEGRATE WITH LUMINATE ONLINE.**
5. **YOUR STAFF WILL NEED TO BE TRAINED IN LUMINATE CRM.**
6. **LUMINATE CRM OFFERS MANY INTEGRATION OPTIONS.**

All of these components are vital to understanding the full scope of Luminate CRM and all the benefits therein. With these factors in mind, you'll be well poised to determine the best path toward finding the right CRM solution.

If you're considering making the move to Luminate CRM, you first need to be a Salesforce user.

Unlike Luminate Online, which is its own digital fundraising and marketing solution, Luminate CRM was built on top of Salesforce and is only available to nonprofits who want to remain on Salesforce.

For nonprofits who are already on the Salesforce platform, Luminate CRM is an excellent way to reap the benefits of your existing platform without sacrificing the innovation and nonprofit expertise of Blackbaud and the Luminate product family.

In short: working with Luminate CRM and Salesforce gives you the best of both systems, all within one comprehensive solution. That said, Salesforce is designed to accommodate enterprise-level nonprofits with complex needs and high capacity for customization; if that doesn't sound like your organization, Luminate CRM may not be the best choice (at least, not yet!).

Because Luminate CRM leverages the open Salesforce API, you can integrate other applications to limitlessly customize your constituent management experience. Don't worry—we'll touch more on integration options later on in this post.

For now, it's only important that you understand that Luminate CRM is a highly broad platform with a range of capabilities; you should only consider this software if your organization is established enough to take on such an expansive tool kit (and can benefit from such).

Before you can select the right CRM software to meet your needs, you need to determine what you'll be using your CRM for.

Of course, any CRM will offer fundamental constituent management features such as the ability to build custom donor profiles, track fundraising campaign progress, and generate pre-built or personalized reports. However, for nonprofits with more wide-ranging needs, basic tools won't be enough to cater to donors and stay on top of necessary tasks.

That being the case, Luminate CRM seeks to go above and beyond the standard CRM and instead offers a feature set that can streamline your nonprofit's efforts from end to end. A sampling of those features includes:

- Donation management.
- Direct marketing.
- Reporting and analytics.
- Event management.
- Volunteer mangement.

And because Luminate CRM works hand in hand with Salesforce, you'll be able to get an entirely inclusive view of all of your constituents' data, including transactions, giving histories, engagements, interactions and more.

If an in-depth picture of your data on a number of levels is what your organization needs to thrive, Luminate CRM might be a good fit. If you're in need of a more lightweight donor management tool, you likely won't have a need for Luminate CRM's comprehensive feature set.

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It's also crucial for your nonprofit to understand that Luminate CRM is not a one-size-fits-all CRM.

For small nonprofits with simple donor management needs, it's important to be able to get up and running with all the most important donor management tools as quickly as possible. For larger organizations, it's much more important that your CRM fits your needs in a completely unique way—that's where Luminate CRM can be your greatest ally!

Luminate CRM has practically unlimited configuration options to ensure it can help nonprofits of all types tailor their CRM experience. For example, your organization can build custom:

- Fields.
- Workflows.
- Roles and privileges.
- Page layouts.
- Email notifications.
- Objects.
- Calculations.

However, it's also important to note that these customizations require a knowledge of the Salesforce infrastructure and API. Unless your nonprofit has an extensive IT department, you'll almost definitely need some form of outside help to bring your vision of a customized CRM to life.

A nonprofit technology consultant can provide invaluable expertise in helping your nonprofit design a constituent management platform that's custom-fitted to your donors, fundraising strategies, and goals.

A consulting firm can provide guidance in how to see your fundraising and donor engagement plans most effectively come to fruition; then, they'll configure your Luminate CRM to support you along the way.

As we mentioned, Luminate CRM is not the only valuable tool within the Blackbaud Luminate family. In fact, Luminate Online can also offer a mulitfaceted fundraising and marketing solution for nonprofits.

If your organization is looking to expand your online fundraising and communications in conjunction with enhancing your constituent management, consider pairing your Luminate CRM with Luminate Online for an even more comprehensive solution.

By integrating Luminate Online with your Salesforce/Luminate CRM platform, you'll gain access to all of the following additional features:

- Email campaign management.
- Customizable donation forms.
- Branded web design.
- Action alerts.

Luminate Online also offers add-ons to expand the core product, including peer-to-peer and advocacy solutions. These highly specific fundraising tools are perfect for nonprofits looking to engage with their supporters in creative and completely unique ways.

To learn more about how to customize your platform for optimum success, **check out our breakdown of 5 key configuration tips for TeamRaiser**, Luminate Online's peer-to-peer fundraising software.
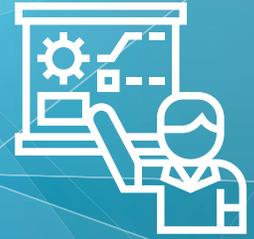
Because Luminate CRM is so versatile, it's not the kind of CRM you can simply feel your way around. To really understand the ins and outs of this software, you'll need to invest in professional training.

While training is a necessity for Luminate CRM, you should keep in mind that it will come at an additional cost. Before committing to your purchase, consider these questions to make sure you're prepared for the training ahead:

- What are your organization's goals for Luminate CRM?
- Will you work with Blackbaud's training team or search for an outside consultant?
- How much room in your budget do you have for training?
- What timeline would you like to set for the training period?
- Who on your staff needs to undergo the training?
- Will you seek out in-person training or can you get by with online resources (think: training videos, how-to guides)?

Of course, the answers to these questions will all inform the others. For example, if your goals for using Luminate CRM fall outside the scope of Blackbaud's training materials, you'll likely be better off finding a nonprofit technology consultant who specializes in Blackbaud products and can work with you to develop a custom training plan.

No matter what, make sure you're prepared to invest in training until all the appropriate members of your team are well-versed in Luminate CRM. If you don't, you won't get much out of the platform.

In addition to being highly customizable, Luminate CRM can also be integrated with other platforms to extend its capabilities even further.

For example, you might integrate your CRM with any of the following types of platforms:

- Microsoft Office suite
- Google apps
- Salesforce AppExchange apps
- Custom integrations via the Enterprise Web Services API

As with customizations, the advantage of integrating your CRM with other tools is that you'll have greater control over what kinds of information you store and how you use your database to engage with donors. For example, if you're an organization who relies on events to raise funds or engage constituents, you may want to integrate a more robust event management app to expand the Salesforce or Luminate CRM capabilities.

And because the integrations centralize the platforms, you won't have to worry about going back and forth between one operating system and another. As long as the solutions are all compatible, your data will be available in one place: your CRM!

Be aware, though—much like reconfigurations, integrations can be tricky and require an adept knowledge of the Salesforce API.

To ensure you don't lose data or inadvertently make a fatal misstep during the setup process, bring on a nonprofit consultant who has experience handling Luminate integrations. They'll be able to transfer your data initially and make sure your integrations are all properly connected.

Trust us: while a consultant might seem like an up-front investment, their assistance will certainly pay off when your systems are all running smoothly later on!