

CRM Software Recommendations



CRM software is essential for storing and tracking interactions with stakeholders, alumni, members, volunteers, donors, and prospects, all in one accessible system to strengthen relationships.

The answers to these questions will guide your choice of platform, with our recommendations below.

We've outlined three CRMs for basic needs, and three for more advanced requirements. We strongly encourage researching which option best suits your organisation's unique needs before making a commitment.

Where to start?

To choose the best software for your cause, your team should first prioritise these four key database considerations:

1. Integrations

This will help assess how your database integrates with your current systems, reducing the risk of human error through automation.

- Does it integrate with your current systems (e.g. Xero, Stripe, Mailchimp, your website host)?
- Would it integrate with future systems you're considering?
- What is the cost of integration?

2. Size of Contact List

This will help you choose between a fixed fee or a sliding scale based on your number of constituent records.

- How many records does your database need to hold now?
- How many will it need to hold in two years? In ten?
- Can this database support your growth plans?

3. Records

This will define the information you need on contacts and ensure the database meets your organisation's needs.

- What contact info do you need to store?
- How flexible is the database for custom or bespoke fields?
- What privacy levels are needed for user access?
- Can you easily record and retrieve information?

4. Preferred Support Style

Based on your team's CRM experience, do you prefer personalised support (phone or in-person), a New Zealand operator, or are you comfortable with online modules? This will affect response times.

Basic Level Offerings: Organisations with < 2,500 Records



The **Capterra score** is a star rating generated by an independent reputable software recommendation platform. This score is out of 5, based on user's feedback and reflects ease of use, customer service, quality of features and value for money.

The **Customisable score** is based on a scale of 1 (off-the-shelf) to 10 (fully bespoke).

Costs are approximate and based on research done in 2024 - most systems will require you to meet with them to discuss your organisation's needs before confirming a price with you.



Capterra Score: 4.82

Cost: From £160/month, + bespoke modules from £20 a month.

Location: Scotland

Customisable Score: 5

Pros	Cons
<ul style="list-style-type: none">• Exceptional customer service (fast and communicative)• Customizable to include only necessary features• Easy data migration• Xero integration	<ul style="list-style-type: none">• No free trial/free version• No training guides specifically for your bespoke fit out.• Set up time up to 4 weeks.• No phone support

Highlighted features: donor management, fundraising, volunteer management, memberships, social forums, email campaigns, grants and opportunities tracking, mentoring, and events.



Capterra Score: 5

Cost: Free for up to 2,500 records; NZD \$149/month for email and advanced database features.

Location: Australia

Customisable Score: 2

Pros	Cons
<ul style="list-style-type: none">• Exceptional customer service• User-friendly fundraising interface and dashboard• Dedicated help microsite• Comprehensive supporter profiles	<ul style="list-style-type: none">• New platform (est. 2020), potential for undiscovered issues• No Xero integration

Highlighted features: Initially a peer-to-peer fundraising tool, now a full-featured CRM database.



Capterra Score: 4.7

Cost: USD \$45/month for up to 2,500 records; cost scales.

Location: USA

Customisable Score: 2

Pros	Cons
<ul style="list-style-type: none">• Transparent pricing• Simple, user-friendly interface	<ul style="list-style-type: none">• Consultant support at \$150/hour• No Xero integration• Lacks a built-in email marketing platform• Email support only

Highlighted features: Primarily donor management, with added functionality for fundraising, reporting, gift tracking, and offline donations.

Organisations Requiring Additional Features



Capterra Score: 4.6
Cost: NZD \$298/month
Location: NZ
Customisable Score: 7

Pros	Cons
<ul style="list-style-type: none"> • Tele-fundraising tracking • Advanced reporting and single supporter view • NZ-based 	<ul style="list-style-type: none"> • \$200/hr for additional training after onboarding • Email-only support

Highlighted features: Originally from the education sector, this platform can accommodate databases of 500k and upwards.



Capterra Score: 3.8
Cost: USD \$7,500 setup + \$500/month
Location: USA
Customisable Score: 7

Pros	Cons
<ul style="list-style-type: none"> • Form and survey generation • Free support, including phone support 	<ul style="list-style-type: none"> • High setup cost • Setup time up to 1 month

Highlighted features: This platform focuses on growing fundraising, not just tracking data, vital for small teams.



Capterra Score: 4.7
Cost: starts at USD \$60/month
Location: USA
Customisable Score: 9

Pros	Cons
<ul style="list-style-type: none"> • Advanced fundraising technology • Comprehensive toolset for diverse needs 	<ul style="list-style-type: none"> • Complex pricing structure • Requires significant staff time for management and to utilise all features effectively

Highlighted features: Primarily donor management, with added functionality for fundraising, reporting, gift tracking, and offline donations.

For further reading, there are a range of sector-specific platforms tailored to unique group requirements. Notable options include **Hello Club** (sports & recreation), **Infoodle** (for church groups), and **Hivebrite** (best suited for community organisations). Every platform will have distinct pros and cons, - we recommend always speaking with platform representatives to determine what will work best for your organisation.