**Your Online Communications and Fundraising Audit**

**Summary**

At the top of the document write a brief summary that clarifies that the audit is a current analysis of your online communications and fundraising systems and that additional audits will be conducted on an annual basis. Clarify that the document is a working document meant to chronicle progress as well as inaction.

**Constituent Relationship Management (CRM) System**

A CRM is a database that captures information about your donors, members, and volunteers and enables your nonprofit to track projects, campaigns, and events. It can be fully customized to serve the needs of your organization, but of course becomes more complicated to implement the larger your organization and the more complex your needs. Today’s most effective CRMs are web-hosted or cloud-based to allow for easy management and remote access. If your nonprofit is spending a lot of staff hours and financial resources maintaining and upgrading an out-of-date CRM, then it may be time to research and select a new CRM that is better suited to modern trends in mobile and social fundraising. Chapter 5 discusses in detail the CRMs most commonly used in the nonprofit sector and how much of a financial investment is required to upgrade your CRM system.

**Content Management System (CMS)**

A CMS is a website platform that enables nonprofits to easily publish and edit website content. A website empowered by a CMS gives the nonprofit complete control over their website communications and eliminates the need to be dependent upon a third party for website management. Most nonprofits will need a new website much sooner than later that is mobile compatible and appeals to today’s advanced Internet audience. When conducting your audit, a new CMS and website will likely elevate to the top of your list of priorities. Chapter 3 lists characteristics to look for in a CMS and the best practices for launching and designing a new website that is compatible with mobile devices.

**Email Communication Software**

The vast majority of nonprofits use a web-based email publishing system for their e-newsletters and fundraising appeals, but unfortunately there is still too large a number of nonprofits that are sending mass emails via BCC, and even worse, attaching PDFs to such emails. Chapter 4 highlights best practices in email communications and fundraising, but in terms of your audit, nonprofits need to prioritize email communications that are mobile compatible and professionally designed.

**Online Fundraising Software**

Deciding whether you need to upgrade your online fundraising software is simple. If your nonprofit’s online donation page is not compatible with mobile devices and is not embedded inside of your website, then investing in a new online fundraising software is a must. Fortunately, as discussed in detail in Chapter 5, this is not difficult to do or financially burdensome. Additionally, if your nonprofit is ready to experiment with social fundraising and crowdfunding, the software recommended and best practices are discussed in Chapter 5.