3 Questions to Ask **Before Selecting a GMS**

You can't ignore it any longer. It's time to find a better system to manage your grantmaking activities. You're spending more time on administration than on making grants. A Grants Management System (GMS) can be an effective way to solve that problem. But how do you know what's right for your organization? Start by asking these questions to select a GMS.

1. WHAT ARE YOUR CURRENT PAINS AND ISSUES?

Identify the pain points in your daily grantmaking activities. If you could change just one thing to make your work run smoother, what would it be?

Need some ideas to get started? Take a look at these common trouble spots:

- Using paper or low-tech systems, like maintaining static, complicated spreadsheets or printing out application packets
- Doing everything manually, manually typing in all application data or writing out check request forms
- Can't make changes to the system when you need it. You have to go through a developer instead of having a staff member do it
- Can't get the reports you need, like visually showing the money granted by year or by program

2. WHY ARE YOU GETTING A NEW SYSTEM?

The answer to this question will steer you to potential solutions. For example, if your current system is unable to manage how you interact with nonprofits, you want to look at solutions that have a Customer Relationship Management (CRM) component.

Some organizations point to these factors:

- The information you need is in many different places. A relational database can centralize data in one location

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- The system depends too much on you. May need one that integrates technological innovation, like artificial intelligence learning, so it's more automated
- It's hard to tell the system what you want it to do. May need a better user interface
- The system doesn't talk to the other tools you use, like Outlook or Gmail
- Too many different points of entry. An online portal can eliminate incorrect or duplicate data entry

3. WHO SHOULD BE INVOLVED IN THE SELECTION PROCESS?

Ask this question to ensure you get an organization-wide view. Different users have different needs. If you don't get everyone's input, your new system may not address all of your pain points or gain the user adoption you hoped for.

Here's a list of groups to involve and what action to take for each:

- Main users (e.g., Program Staff) – Get specific feedback on pain points and key features they need
- Purchasers (e.g., Executives) – Understand what information they'll need in order to make a decision
- Board of Directors – Ask them how involved they want to be. Determine if this an 'FYI' or if they will be the final decision makers
- Casual users (e.g., finance, office admins, etc.) – Keep them informed of the project to create buy-in. They may have additional feedback from the previous implementations in which they've been involved

PUTTING IT ALL TOGETHER

By asking and answering these questions, you're beginning a needs analysis. The next step is to prioritize the list. Which are a must-have and which are a like-to-have? Keep your overall goal as your primary focus. For example, if you want to automate the work of the grant manager, automation features would rank higher.

Remember that no system is perfect. Consider whether it can be customized to fit your needs. You may be able to start with a basic structure, then scale it later as your needs grow.

Want to learn more? Using Salesforce, we can help you create a GMS that's customized to work for your organization. Let's start the conversation, contact us today at 646.291.2136 or info@sputnikmoment.com.

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