

Staying Ahead on the Innovation Curve: Driving ROI and Strategic Growth





Agenda

Introduction

CRM Maturity Model

Self Assessment Activity

Peer Sharing and Case Examples

Moving Up the Maturity Curve

Session Objectives:

- ❑ Discover how the CRM Maturity Model can unlock greater ROI.
- ❑ Determine where your institution is today on the maturity curve.
- ❑ Identify practical steps to accelerate growth and impact.
- ❑ Gain inspiration from peers who are advancing their CRM strategy.





Introducing: *Kindsight's CRM Maturity Model*





ACCELERATE ROI
through strategic planning,
goal setting, and
measurement capabilities.



DRIVE ENGAGEMENT
with automation and real-
time insights, deepening
relationships and maximizing
every campaign.



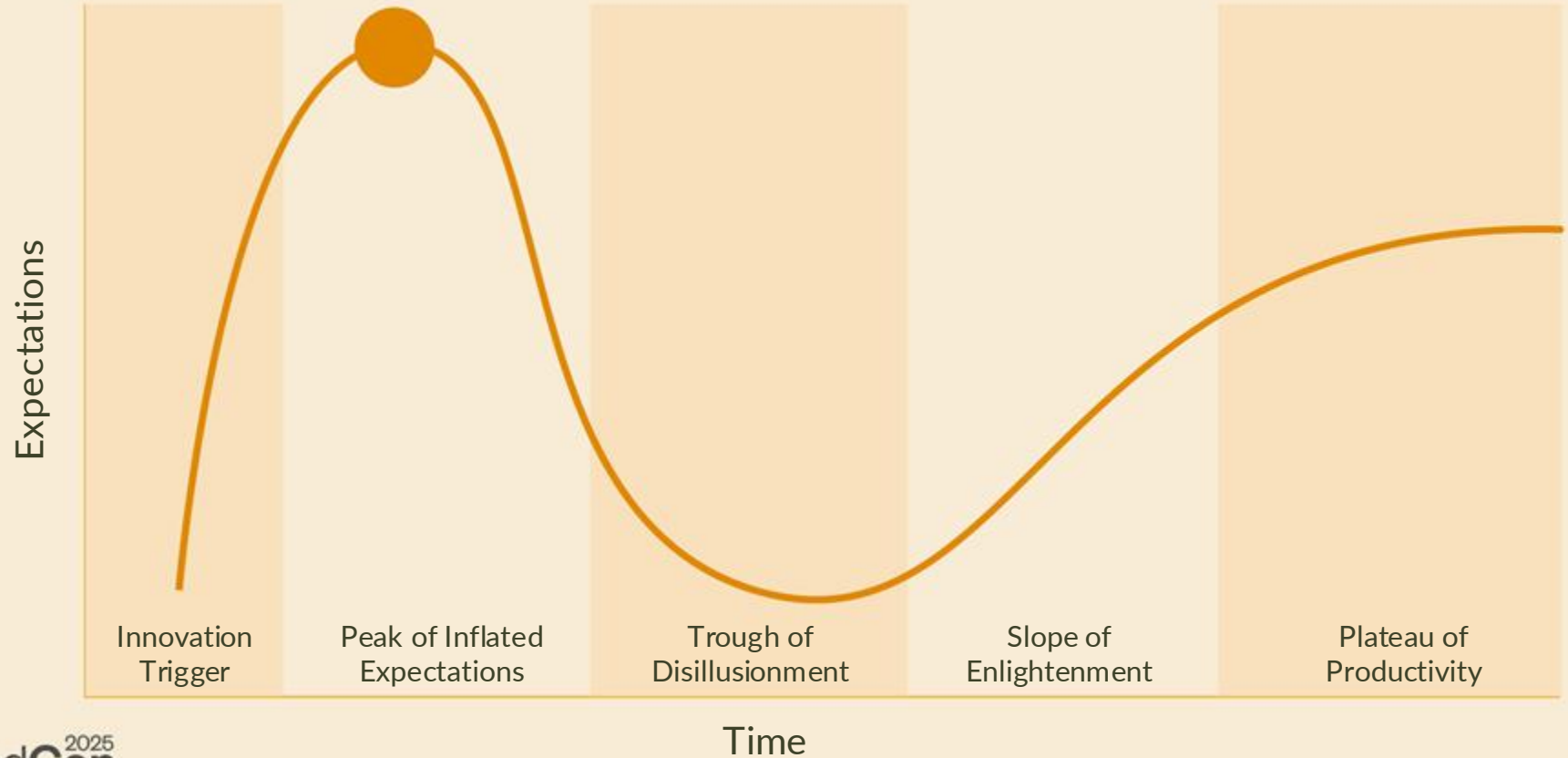
GROW OPPORTUNITIES
through cross-functional
collaboration, increased
efficiency and demonstrated
impact.



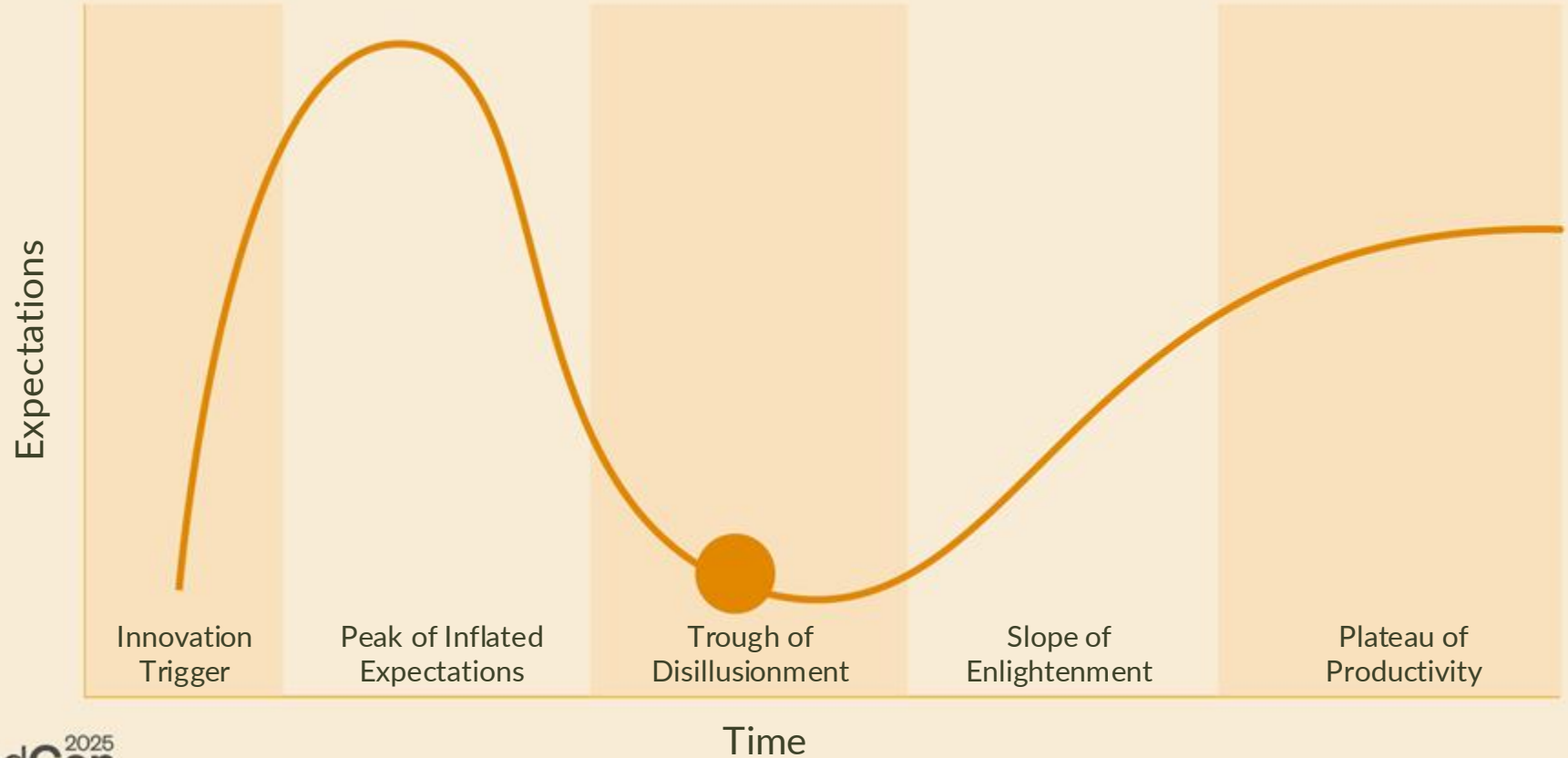
Turn Your CRM Into a Growth Driver

- The Kindsight CRM Maturity Model outlines how institutions may evolve their use of CRM over time—from initial stabilization to becoming a true strategic asset.
- Each stage defines milestones and best practices that expand capabilities, improve efficiency, and unlock new opportunities for growth.

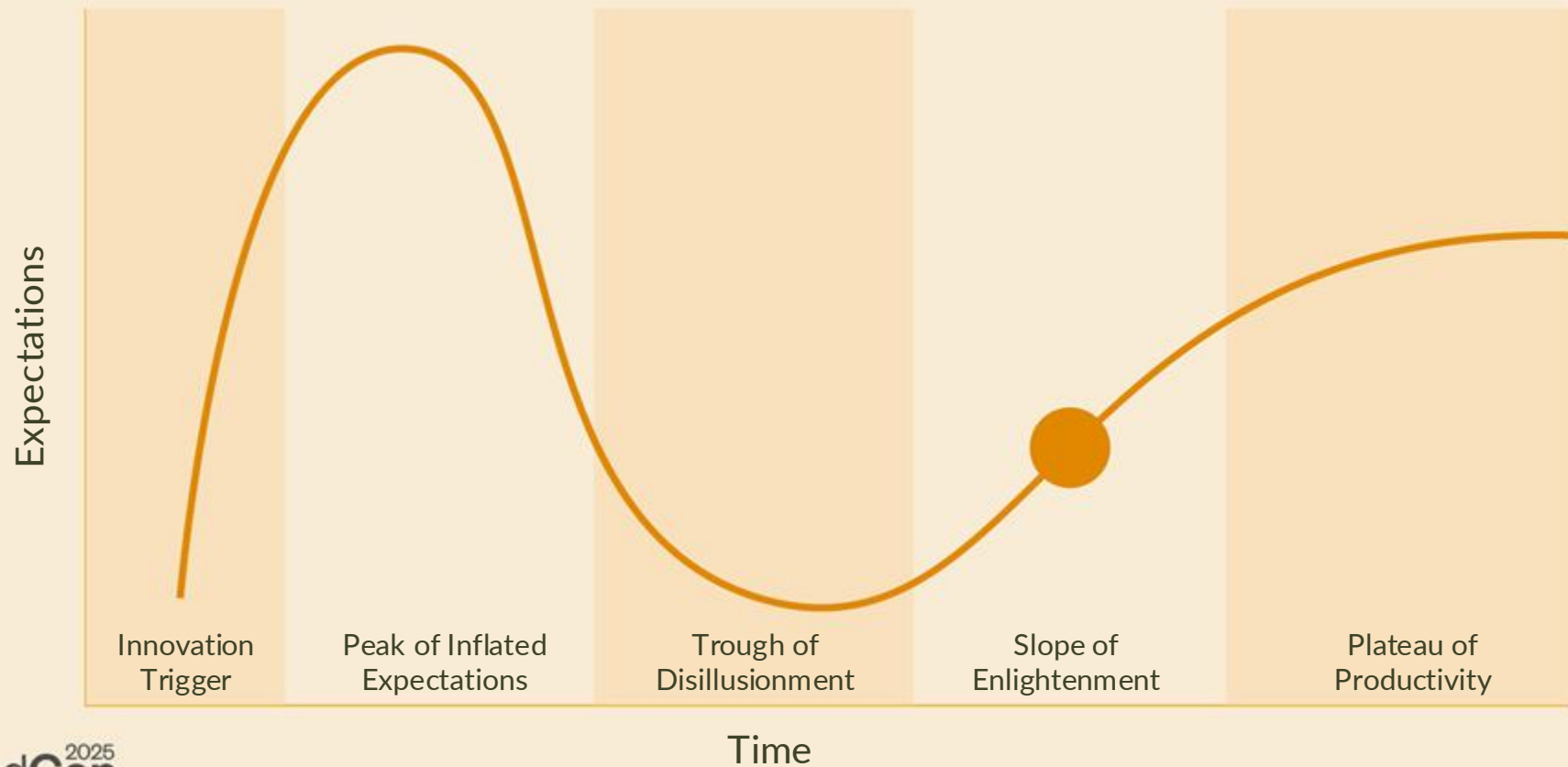
Gartner Hype Cycle



Gartner Hype Cycle



Gartner Hype Cycle



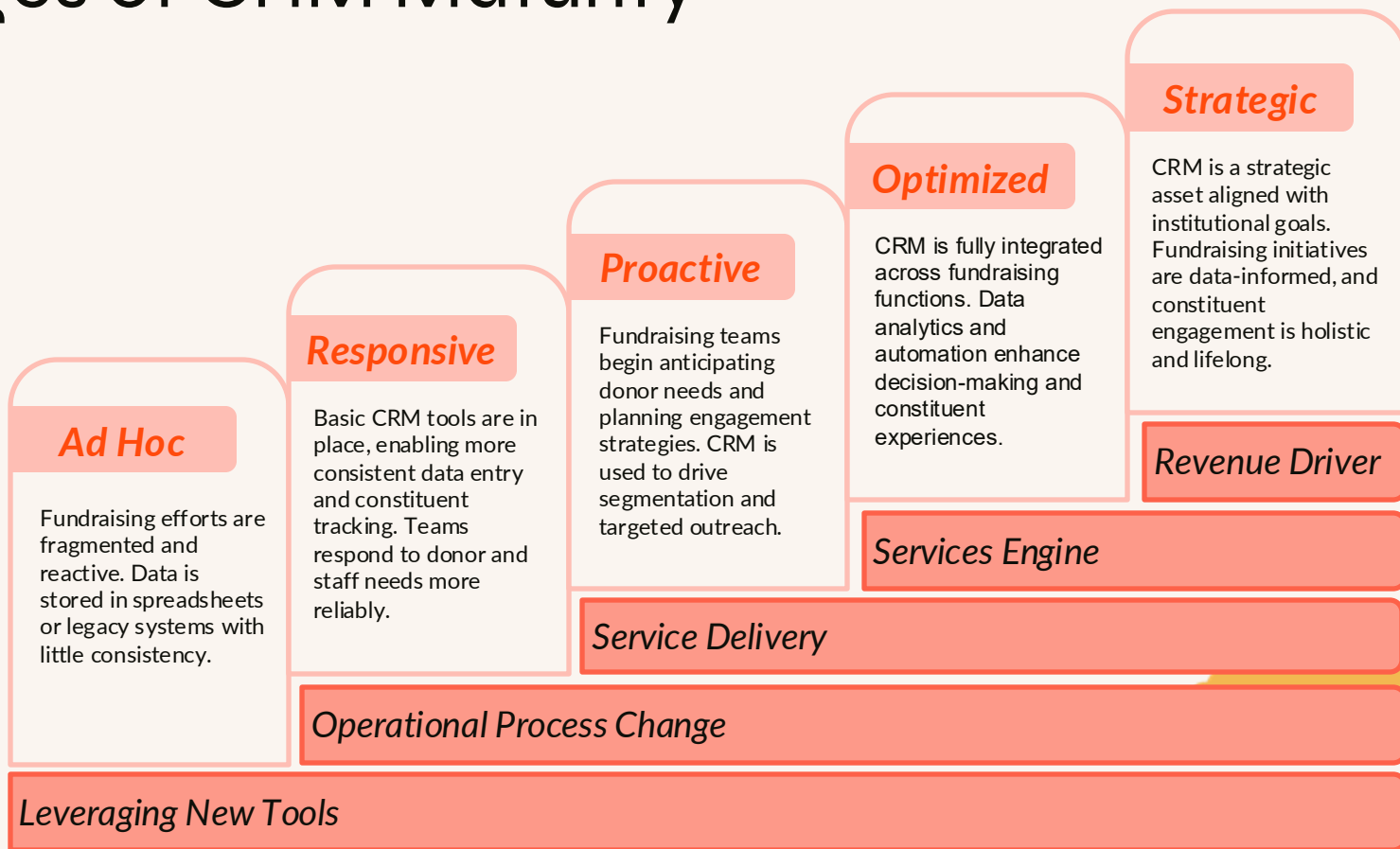


“We overestimate the impact of
technology in the short-term and
underestimate the effect in the long term.”

Amara's Law



5 Stages of CRM Maturity



Why Focus on CRM Maturity?

01 Enhance Donor Personalization

02 Increase Fundraising Efficiency

03 Strengthen Stewardship and Retention

04 Boost Campaign Performance

05 Improve Data Quality and Accessibility

06 Enable Strategic Planning

07 Support Cross-Functional Collaboration

08 Increase Staff Confidence and Productivity

09 Drive Innovation and Agility

10 Demonstrate Institutional Impact





Where is your
institution on the
Maturity Curve?



Maturity Model Assessment



Intended to be a starting point for assessment to meet you where you are.



Improvement ideas can be big or small – it's all about progress.



Answer questions with the 80/20 rule in mind – if you are in implementation, assess your pre-CRM state.



No stage is right or wrong. Each stage has opportunities for growth.





Take out your phones!

Advancement CRM Assessment
<https://tinyurl.com/CRMMaturity>





Moving along the CRM Maturity Curve



Peer Sharing & Case Examples

Gates and Milestones

Responsive -> Proactive

- ✓ Campaigns and appeals are tracked
- ✓ Moves management processes are recorded
- ✓ Outreach is personalized based on engagement
- ✓ Data governance policies are established
- ✓ Constituent journeys are mapped
- ✓ User requests are centralized, and training programs are in place

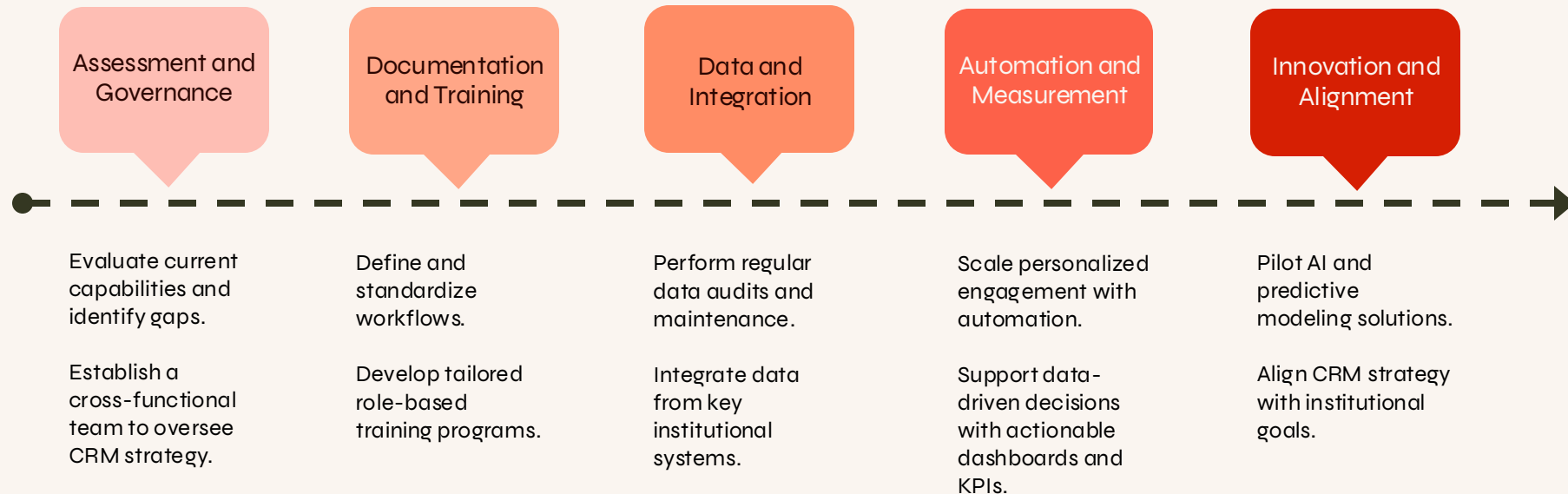
Proactive -> Optimized

- ✓ CRM is integrated with core systems
- ✓ Dashboards and KPIs used to monitor metrics and performance
- ✓ Predictive modeling tools introduced
- ✓ Development (major gifts, annual giving, stewardship) strategies are data-driven and automated
- ✓ CRM is leveraged to prioritize outreach and deepen relationships
- ✓ CRM evolves from a single solution to a connected ecosystem
- ✓ Solution training by role is available on-demand

Optimized -> Strategic

- ✓ CRM ecosystem is embedded in strategic planning and board-level reporting
- ✓ Advancement strategy is informed by real-time analytics and reporting across campus, including AI
- ✓ Lifetime value of constituents is tracked and maximized, with multiple engagement paths and cross-functional collaboration
- ✓ CRM ecosystem supports institution-wide goals (e.g., enrollment, reputation, fundraising)

Elevating CRM Maturity



Next Steps

Thank
you.