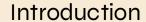


Staying Ahead on the Innovation Curve: Driving ROI and Strategic Growth



Agenda



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 realtime insghts, deepening
relationships and maximizing
every campaign.



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

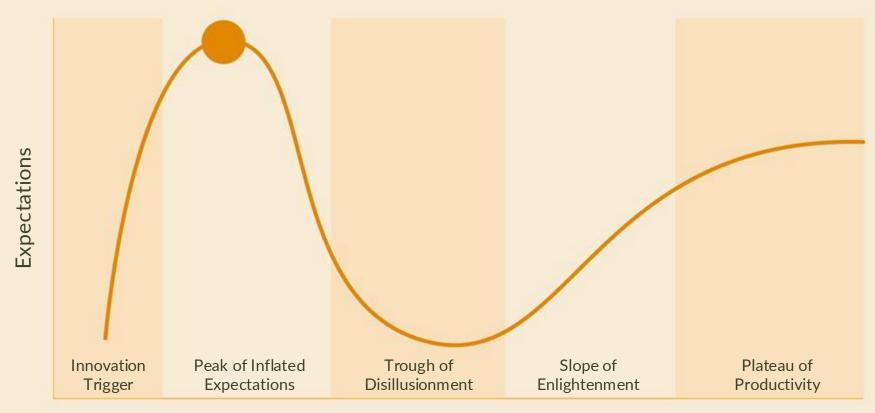


Turn Your CRM Into a Growth Driver

- 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.

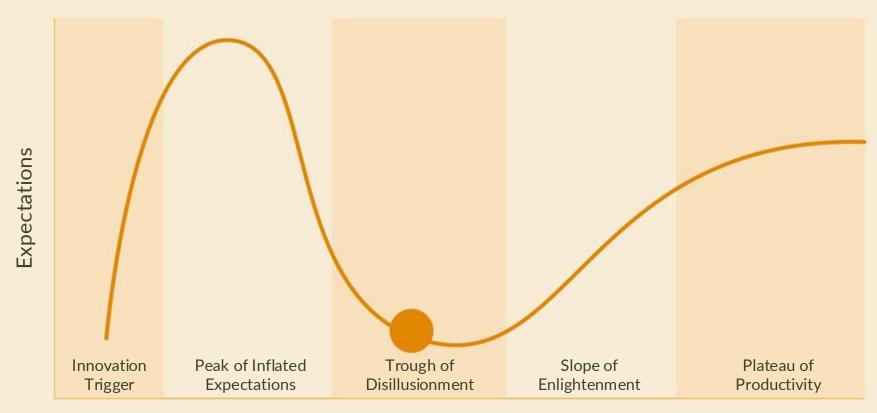


Gartner Hype Cycle



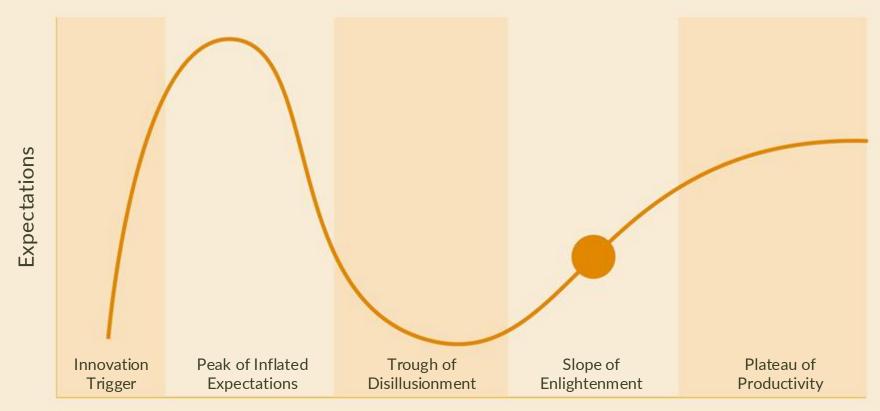


Gartner Hype Cycle

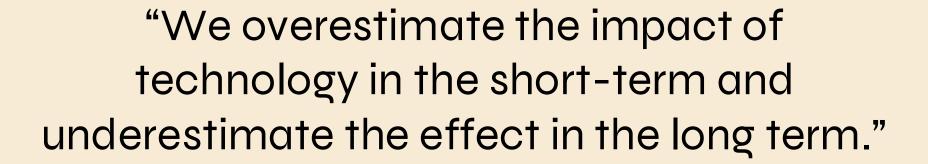




Gartner Hype Cycle







Amara's Law

5 Stages of CRM Maturity

Responsive

Basic CRM tools are in

Ad Hoc

place, enabling more consistent data entry and constituent tracking. Teams respond to donor and staff needs more reliably.

Proactive

Fundraising teams begin anticipating donor needs and planning engagement strategies. CRM is used to drive segmentation and targeted outreach.

Optimized

CRM is fully integrated across fundraising functions. Data analytics and automation enhance decision-making and constituent experiences.

Strategic

CRM is a strategic asset aligned with institutional goals. Fundraising initiatives are data-informed, and constituent engagement is holistic and lifelong.

Revenue Driver

Services Engine

Service Delivery

Operational Process Change



little consistency.

Why Focus on CRM Maturity?

01 Enhance Donor Personalization	06 Enable Strategic Planning
02 Increase Fundraising Efficiency	07 Support Cross-Functional Collaboration
O3 Strengthen Stewardship and Retention	08 Increase Staff Confidence and Productivity
04 Boost Campaign Performance	09 Drive Innovation and Agility
05 Improve Data Quality and Accessibility	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

Assessment and Governance

Documentation and Training

Data and Integration

Automation and Measurement

Innovation and Alignment

Evaluate current capabilities and identify gaps.

Establish a cross-functional team to oversee CRM strategy. Define and standardize workflows.

Develop tailored role-based training programs.

Perform regular data audits and maintenance.

Integrate data from key institutional systems. Scale personalized engagement with automation.

Support datadriven decisions with actionable dashboards and KPIs. Pilot AI and predictive modeling solutions.

Align CRM strategy with institutional goals.



Next Steps



Thank you.







