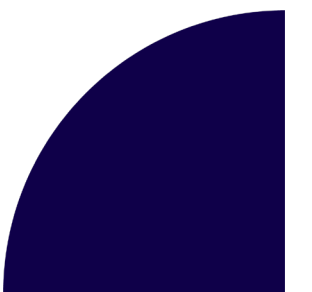
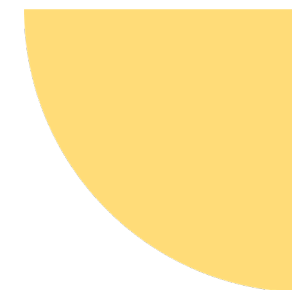
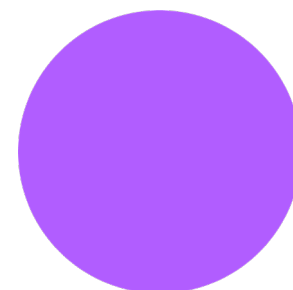


# Working with GoodCRM





Contact Relationship Management,  
for people who do Good.



# Created by organisations like yours.

**BRIGHTER  
SOUND**

August 2017  
It begins



March 2018  
Workflows

DITCHLING  
MUSEUM  
OF **ART+**  
**CRAFT**

March 2019  
Donations



**NHS**

February 2018  
Mailchimp Integration

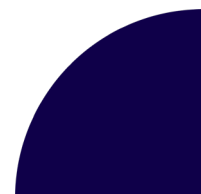
**PANKHURST  
CENTRE**

April 2018  
Memberships

**ACME**



August 2020  
Email Capture



# What does GoodCRM cost?

Micro from £18/mo

**£18**

Per seat/month  
5 or fewer seats

**£99** Setup Fee

Pro from £120/mo

**£24**

Per seat/month  
5 or more seats

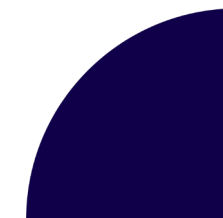
**£299** Setup Fee

Team from £450/mo (2022)

**£45**

Per seat/month  
10 or more seats

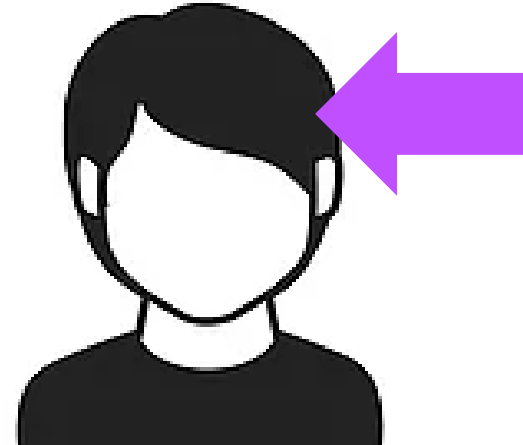
**£699** Setup Fee



**GoodCRM aids  
organisational  
memory.**



# Where is organisational memory?



Organisational memory exists in silos, in our files, inboxes, software and our heads.

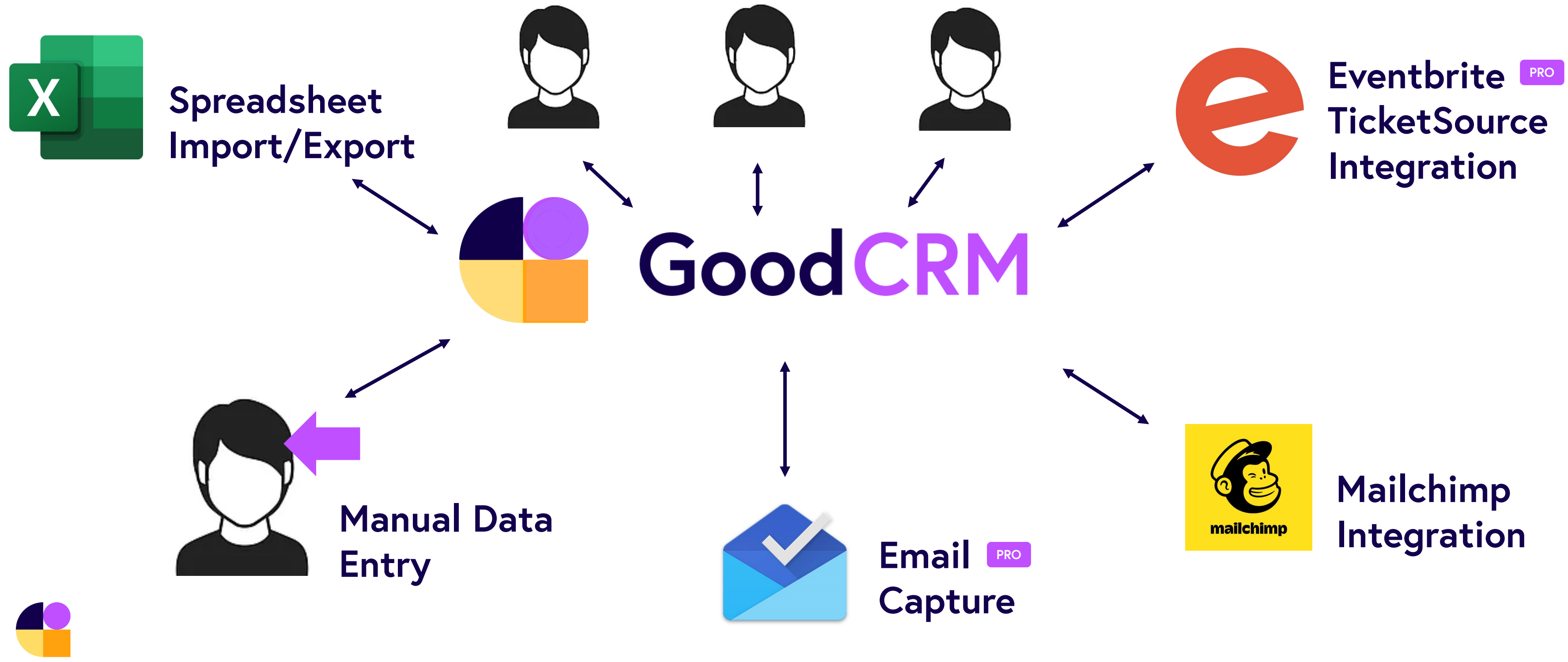
This data is often duplicated and out of date.



When people leave an organisation, some organisational memory often leaves with them.



# CRM centralises data for everyone.



**GoodCRM builds  
capacity.**





# Organisation capacity is split:

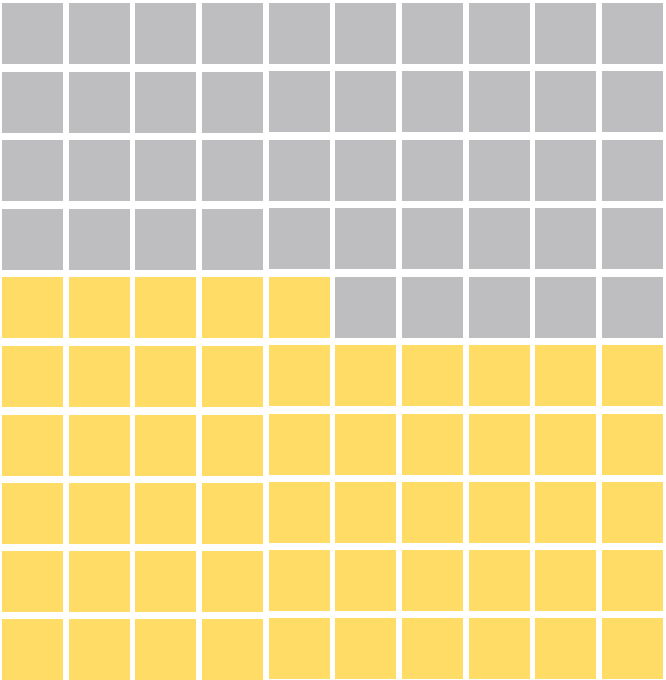
*"The more time we spend accounting for our impact, the less impact we have."*

A lot of an organisation's capacity is spent on being accountable, to funders, boards and regulators.

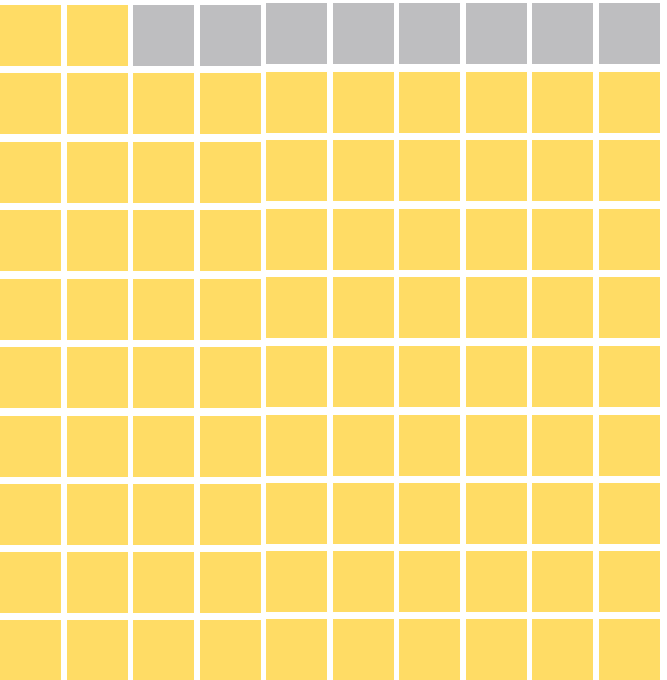
By reducing the work involved in 'accountability admin' we can increase the capacity to deliver on our mission, for our beneficiaries.

*"Data collection should be a consequence of your work, not the work itself."*

Typical capacity split



Optimised capacity split



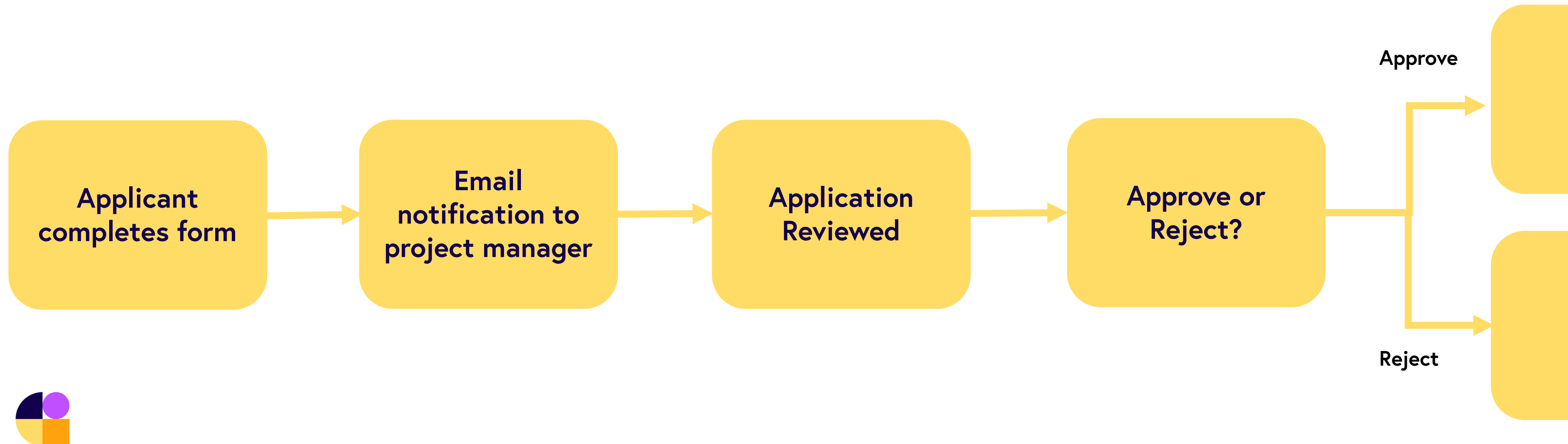
■ Capacity used for admin

■ Capacity used for mission delivery



# GoodCRM helps to build capacity

- Workflows embed your processes into your CRM
- Data is collected automatically as you do your work



**GoodCRM  
functionality.**



- **Contacts & Relationships**
- **Events & Participation**
- **Monitoring & Evaluation**
- **Donations & Memberships\***

17:10  
← Search

# NEW/ADVENTURES

£10.00  
One time donation [Change](#)

Title \*  
Select...

First name \*  
First name

Last name \*  
Last name

Your donation is worth £2.50 more with Gift Aid

Please add Gift Aid to my donation

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax in the current tax year than the amount of Gift Aid claimed on all my donations I must pay any difference. Contact us to cancel this declaration, change your name or address, or if you no longer pay sufficient tax on your income and/or capital gains.

Apple Pay



\*Setup and transaction fees apply.



Mr Henry J Bean

Mascot at [Good Technologies](#)

Donor Regular Donor VIP



0333 344 6515 *Work*

hello@goodcrm.co.uk *Work*

www.goodcrm.co.uk *Website*

Address:  
United Kingdom

▶ All fields

Start date End date x

January 27, 2021 at 10:59 PM

Donated £10.00

Campaign: Donate now  
Not eligible for Gift Aid



Each contact has a **Relationship Timeline**, allowing you to look back at key points in your relationship.

Key moments are captured automatically and you can add notes manually too.



January 27, 2021 at 3:47 PM

Jan 2021 - Four new features

Four new GoodCRM Features you can use today  
See everything connected to a contact. Timelines now fully searchable. Add colour to your tags!  
[View email](#)

Connections

Organisations

PRIMARY CONTACT  
[Good Technologies](#)

Programmes

PROGRAMME MANAGER  
[Shake, Rattle & Roll](#)

Projects

PROJECT MANAGER  
[Shake, Rattle & Roll > Autumn term 2019](#)

Every person and organisation has a profile, we don't place artificial limits on the number of contacts you can store or charge more as your constituents increase.



# Completely configurable

You can create as many attributes as you require for all of your people, organisations, programmes, projects, events etc.

Custom fields include text fields, checkboxes, drop-downs, and file and image uploads.

We can tailor the system using workflows and you can commission new functionality and integrations.



## Fields

Custom fields allow you to collect the data relevant to you.

Changing the order affects how fields are displayed when viewed. To change the order fields appear when e

Add field

- Short text
- Long text
- Checkbox
- Dropdown list
- Radio list
- Checklist
- Multi select list
- Date
- Time
- Image
- File
- Connections
- Tags

Type

Show for tags ?

Date

Agent  
Artist  
Associate



Edit

Long text



Edit

Tags



Edit

Checkbox



Edit

Date



Edit

File



Edit

Images

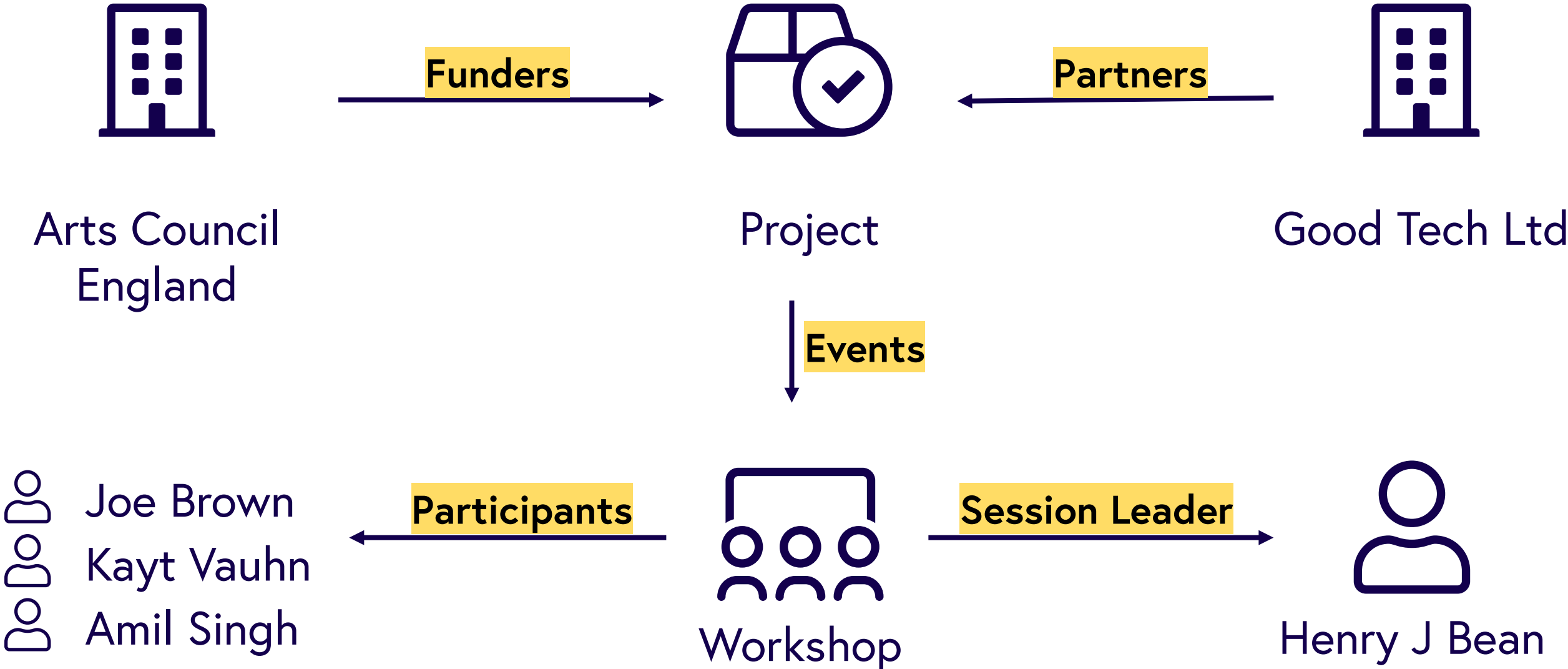
Image



Edit

# Connections define relationships

You can define relationships in your data using connection fields. These allow you to create segments and run reports, e.g. Find all participants from Arts Council funded projects.



# Thank you.

For more information or to book a one-to-one demo to cover you organisation's requirements, visit <https://goodcrm.co.uk/dcn>