

# Welcome!

## Before we get started:

- Today's webinar is scheduled to last 1 hour including Q&A
- Click the CC button for Closed Captions
- BSL interpretation is available
- The recording of this webinar will be available on our website in 7 days
- Ask questions using the Q+A button
- Say hello in the chat (select "Everyone" from the dropdown). You can also use the reaction buttons! 🤗 🎉 😊

# How to choose the right CRM

December 2025

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Tech Champion, Ticketing and CRM



**Digital Culture  
Network**



**Webinar**

# Agenda

1 Why a new CRM?

2 Preparing internally

3 Getting your data ready

4 What to look for in a CRM

5 Shortlisting and evaluation

6 Next steps

# Access free one-to-one support



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Ask a Tech Champion

Ask a Tech Champion

## Got something specific you'd like help with?

Our Tech Champions provide one-to-one support and expertise in a range of specialisms including:

- Digital Strategy and Marketing
- Digital Content Creation
- ECommerce and Merchandising
- Data Analytics and Insights
- Social Media
- Email Marketing
- Box Office Ticketing and CRM
- Websites
- Search Engine Marketing and Optimisation

First Name

Last Name



Email

Organisation

What is it about?

Which discipline is your area of focus?

What region are you based in?

How did you hear about us?

Please tell us about the support you need:

# Why a new CRM?

## Section 1

# What is a CRM?

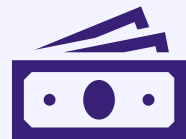
Membership



Bookings



Customer Relationship  
Management



Donations



Communications

# Example organisation

## **Adams Really Terrific Stuff Centre**

- Small creative organisation (fake)
- Events and workshops throughout the year
- 5 staff members
- Relying on Excel



**Spend less time wrestling with data and more time engaging audiences.**



**Where are you on  
your CRM journey?**

# Reasons for change

Messy or manual



No clear view of audiences



Limited insight




Teams working separately





Leadership wants better reporting





# Our challenge

 Customer List 2

 Customer List

 Customer List FINAL

 Customer List FINAL FINAL V2

 RSVP List 2003



# Preparing internally

## Section 2

# Define what you want to achieve

- What are your goals?
- CRM adoption does not equal 'buying software'
- What questions do you want your CRM to answer?

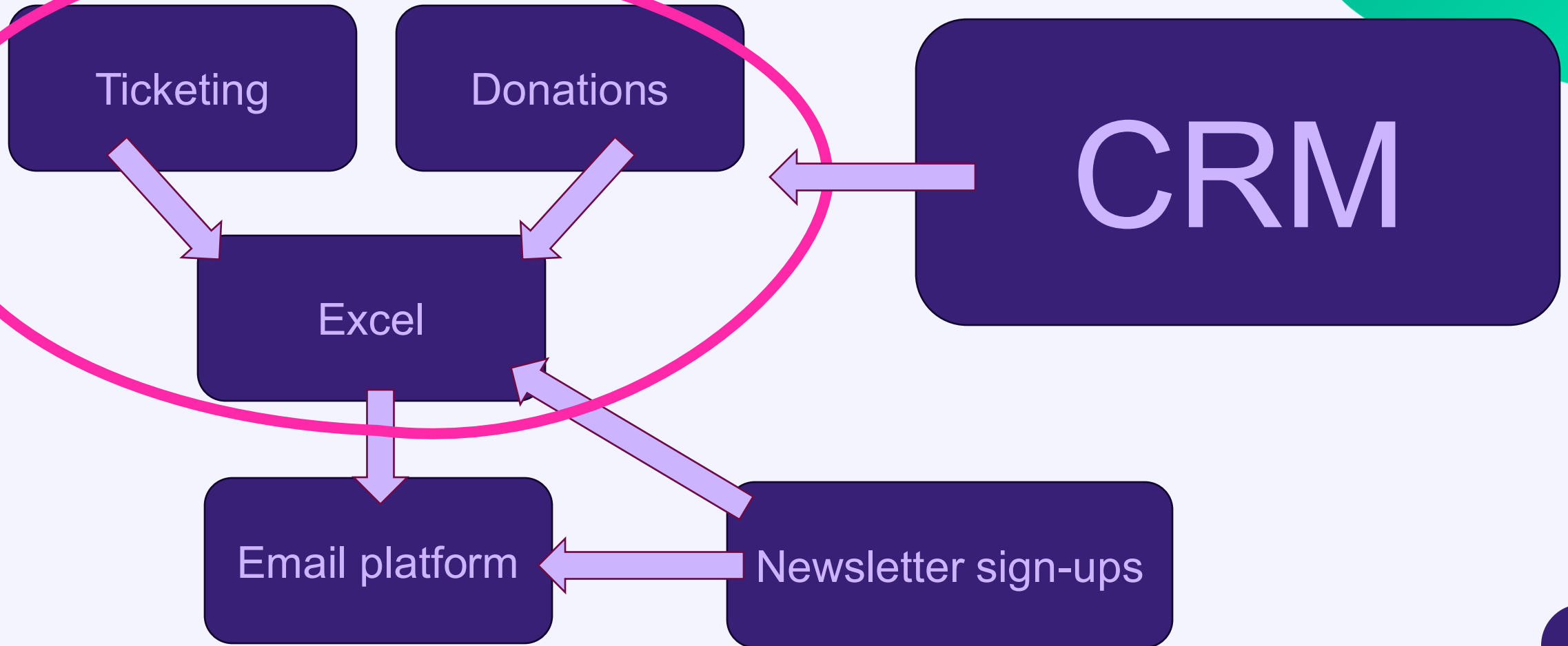
# Questions such as:

Who are our most loyal attendees?

How do workshop participants find us?

Which donors also volunteer?

# Map how you work



# Internal buy-in

- Talk to all data users early
- Agree on what success means
- Identify who will 'own' the system

# Prep in practice

- Interviewed staff about current frustrations
- Created a criteria list:
  - Reduce double data entry.
  - Track who attends multiple programmes.
  - Make audience reporting easier.
  - Improve email list accuracy.
  - Free up staff time for creative work.
- Decided a top priority: Saving time on comms



# Recap - Preparing internally

- Define your CRM goals before looking at systems, focus on outcomes, not features.
- Map your current workflows to reveal gaps and opportunities.
- Engage your team early, shared ownership is what makes a CRM succeed.
- A short internal prep phase can save months of confusion later.

# Getting your data ready

Section 3













# How and why data prep matters

- Cost!
- You can start now
- Agree on formatting and fields
- Ensure consent data is clear
- Track and label data sources

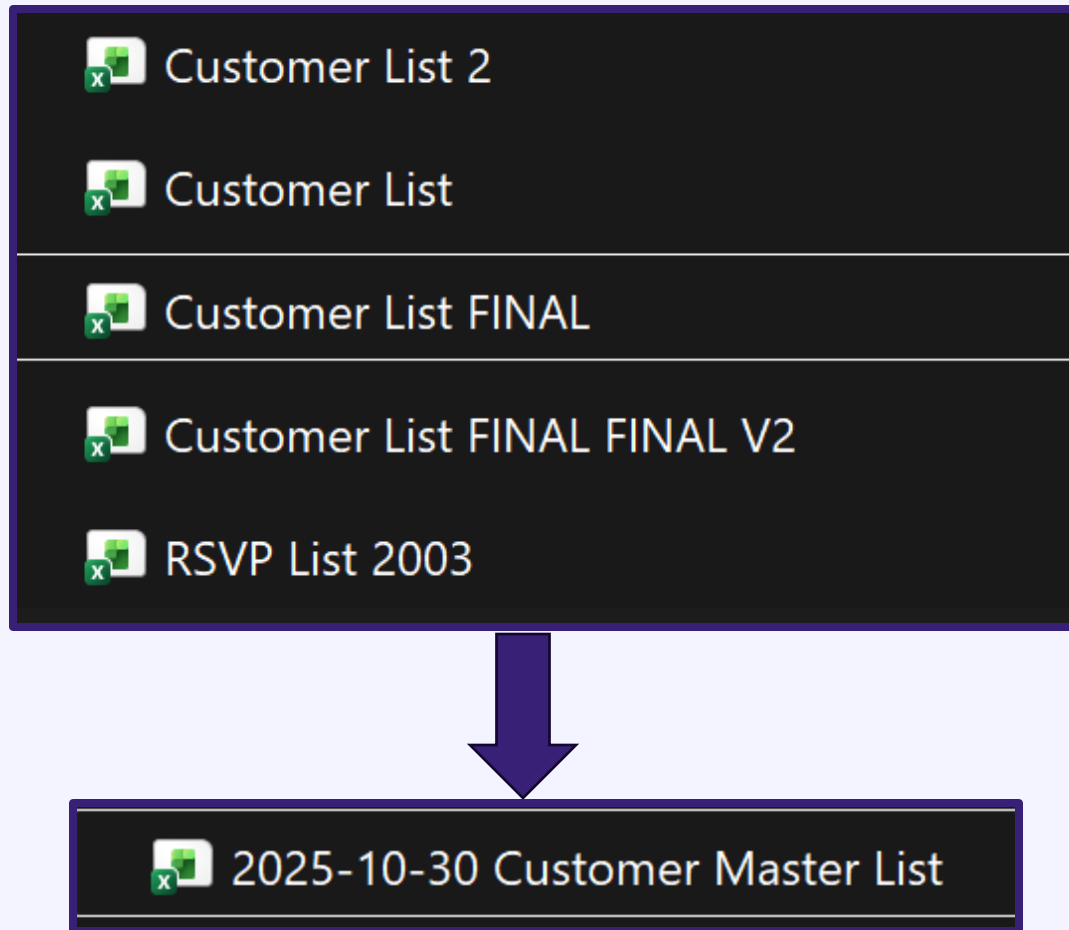


Image Credit: Southbank Centre © Rob Jones

# The data audit

Data	No. of contacts	Relevant?	Clean?	Priority?
Bookings	500			
Newsletter	2,000			
Donors	300			
RSVP from 2003	24			

# Data readiness in action



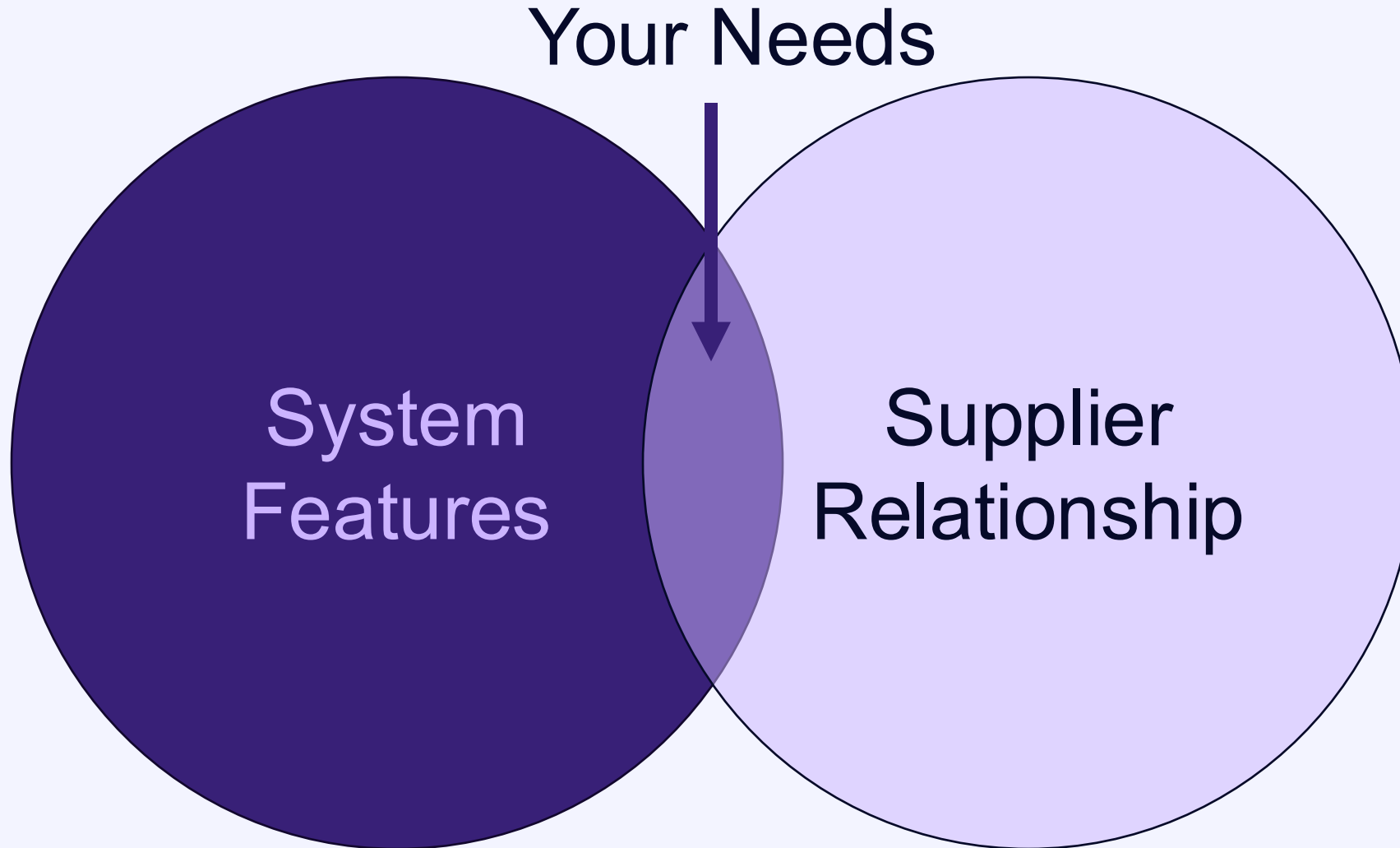
# Recap – Getting your data ready

- Clean data is good data, start tidying now.
- A light audit gives you visibility and control.
- Don't aim for perfection, aim for readiness.

# What to look for in a CRM

Section 4

# Partnership, not product



# Questions for suppliers

- How easy is it to use?
- What training is included?
- Can it grow with us?
- How do you support [my type of arts organisation]?

# Research and defining your criteria

- Organisation vision / mission
- Organisation goals



Criteria	Requirement (E – Essential, D – Desired)

# Research in practice

Criteria	Requirement (E – Essential, D – Desired)	Functionality in place? (Y – Yes N – No)	Comment if marked No. Include details of integrated 3 <sup>rd</sup> party platforms to service requirement
Timeline view of communications	E	✓	
Integration with existing tools	E	✓	
Donation tracking	E	✓	
Monthly cost within budget of £__	D	✓	
24/7 Support	D	✗	23/7 Support :(



Built on earlier  
goals + team  
buy-in

# Recap - What to look for in a CRM

- You're building a relationship, not just buying software.
- Match the supplier's scale and support style to your team's capacity.
- Ask human questions about usability, training, and support.
- Don't underestimate the value of a responsive partner, it's what keeps your CRM sustainable long term.

# Shortlisting and evaluation

Section 5

# Evaluation

**Shortlist**

**Scoring**

**Demos**

**References**



Image Credit: Spread the Word © James Mulkeen

# Shortlisting in practice



40%

25%

20%

15%

Systems	Usability	Reporting	Support	Cost	Total
System 1	6	4	8	6	24
System 2	8	8	7	6	29
System 3	5	10	10	7	32

# Recap – Shortlisting and evaluation

- Keep your shortlist short and realistic.
- Use a scoring process so decisions are transparent and evidence-based.
- Focus demos on your real workflows, not generic features.
- Involve your team, adoption is everyone's responsibility.

# Next steps

Section 6

# Key takeaways

- You don't need to be 'CRM ready' to start preparing
- Start small: define what you need most
- Clean data + clear goals = smoother setup

# Your next steps

1. Review what systems you currently use
2. Define your goals and top frustrations
3. Data tidy-up
4. Contact DCN for free one-to-one support!



# Upcoming webinars

**Sustainable email marketing:  
How to be green AND grow**

**21 January**





**Digital Culture  
Network**



# Q&A