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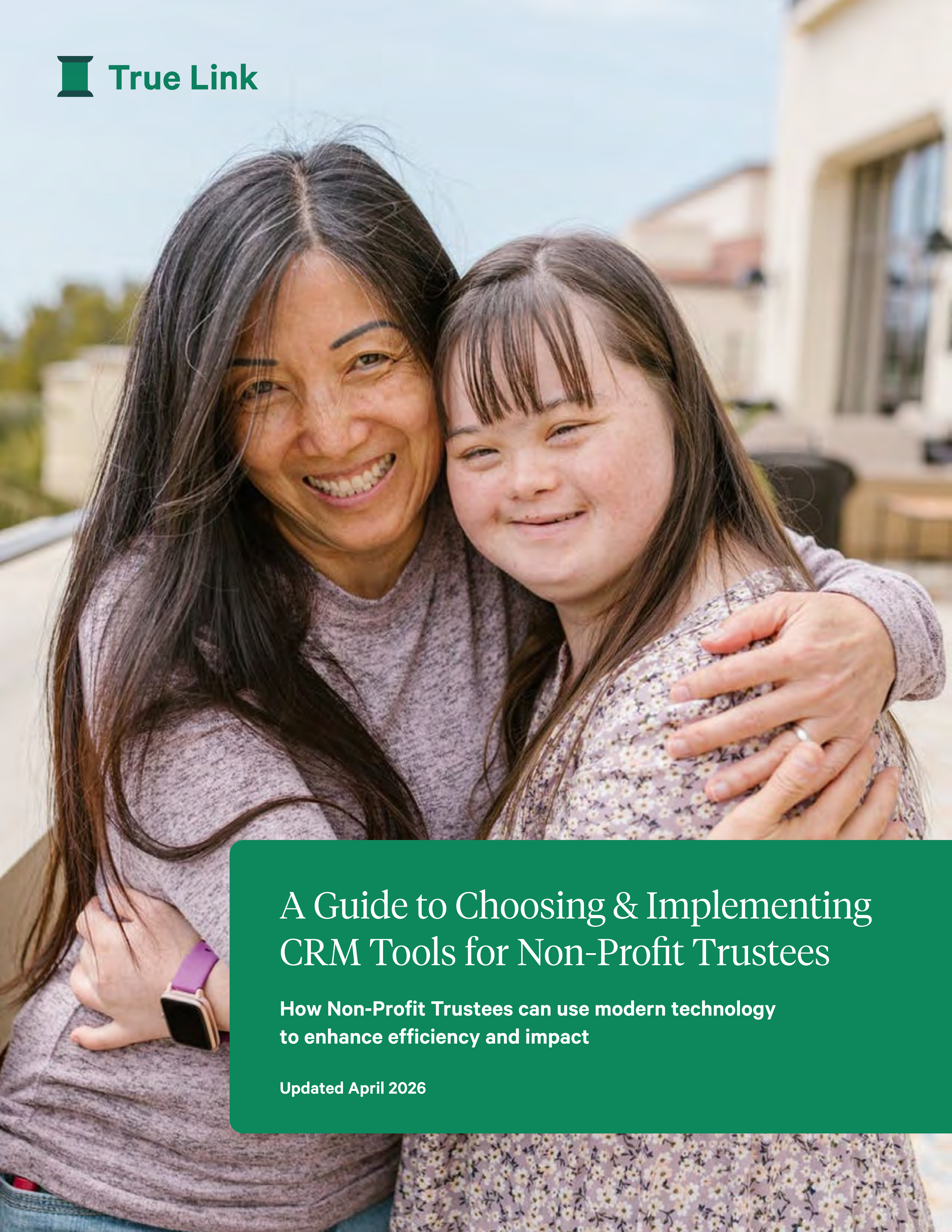

A Guide to Choosing & Implementing CRM Tools for Non-Profit Trustees

How Non-Profit Trustees can use modern technology to enhance efficiency and impact

Updated April 2026

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Introduction

As a financial technology provider for some of the largest pooled special needs trusts, True Link Financial, Inc. ("True Link") is often asked for our recommendations and guidance on other tools that could benefit these organizations. In recent years, these conversations focused on implementing remote processes and communications to help keep employees, beneficiaries, and their families safe and healthy. But over the last couple of years, we've seen a new trend emerge with more and more non-profit trust leaders asking about Customer Relationship Management tools – more often known as CRMs.

Because True Link's platform integrates with many of the top CRM tools and because our team has a background in non-profit trust management, we wanted to go beyond the basics of these tools and provide tangible guidance about how they can be used and implemented.

In this guide, we'll cover:

It's not always the case that non-profit trustees need to invest in a CRM. Many True Link clients rely on our embedded beneficiary profile and quick notes tracking to meet their needs, while others use an external CRM solution that integrates with True Link. Organizations likely benefit from a CRM once they reach a certain level of beneficiaries, number of employees, or operational complexity. This guide should provide a good primer on these tools and help you decide whether a CRM could be beneficial for your organization. Our team is always happy to meet with you to discuss your own unique needs as well.

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Why Non-Profit Trustees Use CRMs

Over recent years, we've seen more and more non-profit trustees moving away from manual practices and legacy systems towards cloud-based solutions, which can offer more flexibility and scalability. In the past, these organizations may have only used CRMs for basic contact management or donor tracking. But now, the role of CRMs has evolved to become a powerful enabler of beneficiary communication, team collaboration, and operational efficiency, and increasingly, workflow automation and AI-assisted insights. Here are some of the high-level reasons non-profit trustees use these tools (we'll provide more specific use cases later in this guide):

Personalized Support for Beneficiaries
CRM systems can play a pivotal role in delivering personalized assistance. By maintaining detailed beneficiary profiles and tracking their unique requirements, trust administrators can tailor services, coordinate care, and anticipate future needs proactively.

Enhanced Communication
CRM platforms often offer robust communication tools that can help the team connect with beneficiaries and their advocates more efficiently. With a CRM, you can send, receive, and track emails connected to an individual; distribute announcements to large groups (e.g., holiday hours, changes in policies, etc.); and schedule automated reminders and mange multi-channel outreach (e.g., SMS or portal notifications.).

Integrated Management of Services
Many non-profit trusts we work with offer other services beyond managing the beneficiary's funds as part of a pooled trust – things like care coordination, vocational training, or residential programs. A well-designed CRM can provide you with a single place to view all of the ways your organization is engaging with and supporting a given beneficiary.

Effective Management of Donors and Friends of the Organization
A CRM can be used for more than just keeping track of information about beneficiaries. Do you have a list of people who come to your annual fundraiser? Or generous community members who volunteer their time to support your mission? Your CRM can be used to track those relationships, communications, and donation history so you can maintain connections with the people who support your organization.

Scalability and Flexibility
As non-profit pooled trusts expand their reach and scope of services, scalability and flexibility become essential considerations. Many CRM systems offer solutions that can adapt to evolving needs, whether accommodating more beneficiaries, expanding service offerings, or integrating with other technology platforms. And with cloud-based deployment options, trust administrators don't need to be at their desks to submit, review, or track important information; they can access CRM functionalities anytime or anywhere – as long as there's internet connectivity.

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How Non-Profit Trustees Use CRMs Today

Modern CRMs track, manage, and enable work to progress and decisions to be made by providing a 360-degree view of your organization's relationships, communications, and processes. Whether you already have a CRM or are exploring the option of using one, here's a list of common use cases shared with us by the pooled trust community.

Growing your Client Community

Staying in front of prospective clients
When a new prospect reaches out, you can add them to your CRM to ensure you are getting them the information they need and staying top of mind. We know that some prospective clients will call in and not give a name, but tracking those leads with the information you do have can still be valuable to your process.

Identifying your best referral sources
Track and report on which law firms or community organizations have referred which beneficiaries so you can thank them for their support, stay connected to drive future referrals, or partner up for an event.

Onboarding new clients
The process of becoming a client often requires beneficiaries and their families to complete a number of forms and other tasks. Within a CRM, you can create a step-by-step process that the team can use to onboard a new client and ensure you have the information you need.

Beneficiary Communication

Track beneficiary interactions in one place
From emails to phone calls to at-home visits with beneficiaries and their advocates, all can be tracked and logged in the CRM and seen in one place. This can be particularly useful when more than one team member is involved in supporting each client.

Streamline communications
Instead of writing each communication from scratch, you can create templates for emails, texts, and letters to beneficiaries and families about common questions like guidelines for submitting a disbursement request or what information is needed to open a new trust.

Ease of access to important documents
Within a CRM, you can store files associated with your beneficiaries on their respective contact page, so they are easy to reference when you need them. This includes collecting and tracking documents that have been submitted before becoming a client.

Task Management

Collaborate across your team
With a CRM, you can set up multi-step processes and assign tasks and reminders for yourself and your teammates.

Time tracking
For non-profit trusts that bill hourly for certain beneficiary-related tasks, you can also track employees' time for use in billing.

Billing & invoicing
Any hourly fees can be combined with other fixed costs stored in the CRM to create bills and invoices for services rendered.

Recordkeeping

Digital signatures
To help track that you've received the signed documents you need, you can send and save documents for digital signature through your CRM and schedule emails for signature requests and reminders.

Complete track record of changes
With a CRM tool you can see what changes are made, who made them, and when they were made. Having this detailed record of changes can help provide an auditable trail of financial transactions and account changes, even if multiple people are supporting the beneficiary or there is staff turnover

Pull custom reports for key stakeholders
Non-profit trustees need to keep good records and submit detailed reports to be able to ensure compliance with federal and state laws. With a CRM, you can build automated and ad-hoc reports to share with families, courts, and other entities or export into other tools like QuickBooks.

Operational understanding and efficiency
CRM reports can also be valuable for the organization internally. For example, you could create reports that show what each team member has on their plate to make sure workloads are balanced. Or, you could pull a list of which beneficiaries have not engaged in a particular initiative to do targeted outreach about its benefits.

Additional functionality

Donation funnel tracking
For non-profits who rely on donations to fund some of their services, effectively managing donor relationships can help drive more and larger gifts. With a CRM, you can track information about past gifts, what motivates an individual to donate, personal details you want to remember, and next steps for outreach.

App marketplace
Just like your phone has an app store, CRMs also have a marketplace for installing apps that can provide additional functionality. This might include adding a form builder for an annual survey of beneficiaries, managing event registrations for a local info session, or sending text messages from the CRM platform.

Choosing a CRM for your Organization

Choosing the right CRM for your needs can go a long way to ensure your tool actually delivers value to your organization. In addition to looking out for the functionality required (see examples in the list above), here are some other factors that non-profit trustees should keep in mind:

Affordability
As a non-profit trustee, you want to choose a tool that doesn't break your budget. When assessing the cost for a particular tool, look not just at how much it would cost you today (for a certain number of users or a certain number of contacts), but also how much it would cost if you were to change those numbers. The tool that's most cost effective can vary depending on the size of your organization and plans for growth.

Cost & Timeline for Implementation
In addition to your monthly or annual subscription, there will be costs associated with setting up a new CRM. Providers typically have in-house teams you can hire, or you can work with a third-party agency that has experts in the tool and your use cases. It's also important to ask for an estimate of how long implementation and migration will take and how much support your already busy team will need to provide. True Link is happy to work with whoever your integration team is to make sure your CRM connects effectively with our system.

Learning Curve & Ease of Use
While any new tool will require time to get your team up to speed, choosing a more user-friendly CRM can be helpful. A complex system can lead to more extensive staff training, lower adoption rates, and other inefficiencies.

Integration Capabilities
You want your CRM to easily integrate with other tools and platforms your non-profit uses, such as email software, fundraising platforms, and accounting software. Integrations can streamline operations and reduce manual data entry. So, make a list of what you use regularly and confirm that the CRM has these integrations available.

Security and Compliance
Seek out a CRM with strong security measures to protect beneficiary information and ensure compliance with data protection regulations.

Scalability
Your CRM should be able to grow with your non-profit, accommodating an increasing number of contacts, more complex data, and additional workflows as needed.

Support and Training
Access to reliable customer support and training resources are crucial to help your team make the most of a CRM system.

Experience Supporting Organizations Like Yours
The needs of a non-profit trustee are different from the average for-profit CRM user, so you don't want to be the first non-profit a provider has worked with. Ask them about their non-profit, trust administration, financial advisory, or legal firm experience and look online for reviews from organizations like yours.

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Selecting a Vendor to Implement your CRM

Choosing the right CRM is critical – but equally important is selecting the right consultant or vendor to implement your new tool. In some cases, this will be the same company that provides the CRM (you can hire them to both implement and integrate their software for you), but many non-profit trusts choose to work with third-party vendors. When you're assessing which implementer is right for your organization, here's what you should consider:

Specialized Expertise

While it's valuable (as mentioned above) for your CRM provider to have worked with organizations like yours, this specialized expertise is even more essential when it comes to your CRM implementers. Because these vendors will be customizing the CRM to your needs and integrating it with your existing tools, you'll start implementation several steps ahead if they know the language of your services, already understand your processes, and have best practices from similar clients they can implement. Ask potential candidates about similar projects they've completed and request case studies or references to assess their understanding of non-profit pooled trusts.

Cultural Alignment and Trust

Because of the mission-driven nature of your work, it's important to choose a partner who respects your organization's values and works well with your team. During the interview process, assess the candidate's communication style, problem-solving approach, and willingness to understand your organization's mission deeply. Finding the right candidate can streamline collaboration and lead to a more personalized implementation process.

Resilience and Reliability

Implementing a CRM system can be a complex and sometimes unpredictable journey, so you'll benefit from choosing someone you want to work with when things go wrong. It's important to find an implementer who remains calm and solution-focused when faced with challenges. When chatting with potential implementers, discuss scenarios or past experiences where they had to navigate challenges and ask how they managed to overcome them and how they worked with their client to come to a solution

Communication at the Right Level

Effective communication is key to any successful CRM implementation project, and the onus of translating technical jargon shouldn't fall on your organization. The right implementer should be able to translate complex technical concepts into understandable language, ensuring your team is fully aware of the process and any implications for your operations.

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CRM Comparison: Salesforce vs. Microsoft Dynamics

There are a myriad of CRMs that non-profit trustees are successfully using in their organizations. Some have chosen CRMs that are tailored to specific industries, such as professional conservatorships or law firms, while others have chosen CRMs that serve a broader audience and tend to offer a greater range of capabilities.

Let's compare the two we hear non-profit trustees are most often choosing between: Salesforce and Microsoft Dynamics. Both are powerful tools that start off as blank slates and can be configured to power small organizations of 1-3 people up to Fortune 500 organizations. Here's a look at the two side-by-side:

	Salesforce for Non-Profits	Microsoft Dynamics 365
Affordability	Offers 10 free enterprise user licenses to non-profit teams	No free licenses, but typically more budget friendly for larger teams
Overall Market Share	20-25%	4-6%
Integration	Known to have greater compatibility with more third-party tools (including Microsoft), and more apps available for extension	Excels at integration with Microsoft tools like OneDrive and Outlook; can integrate with other common tools, though not as many as Salesforce
True Link Compatibility	Yes	Yes
Admin Learning Curve	Administrators can do a lot to configure the system without coding, so it's generally considered easier to learn	No-code configuration options are not as robust, so it can present a steeper learning curve
User Learning Curve	Similar on both platforms and often depends on the complexity of the implementation	Similar on both platforms and often depends on the complexity of the implementation

Ultimately, your decision about the right tool should hinge on your specific organization's needs – and it might make sense for you to choose a more tailored tool instead of Salesforce or Microsoft Dynamics. Regardless of the CRM you select, we're committed to supporting your organization to integrate effectively with True Link's platform and data.

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Implementation Tips for CRM Success

Even if you've used a CRM before, getting a new tool set up correctly for your team can feel daunting. And while it's great to work with someone with a technical background – whether that's in-house IT support, a CRM provider, or a third-party vendor – it's helpful to provide them clear guidance on how to implement this solution to meet your needs. As you navigate your CRM implementation, here are some tips to keep in mind.

Get your team's input

Before starting your CRM setup, it's important to align with your team on their top priorities and frequent workflows. Ultimately, your employees who are using this tool daily are in the best position to identify what they need to do their jobs well. Executives will have a good sense of the general workflows and responsibilities of their team, but the individuals who are running through the same processes weekly, daily, or even hourly are going to have the most valuable insights on how a CRM tool should function.

Map out your team's processes

While you may already have a list of use cases from the CRM selection process, pre-implementation is the time to map these out in more detail. Let's look at a common process in non-profit trusts as an example – communicating with a prospective beneficiary. You might write out the following steps:

1. A **Family Member** calls for more information about the support your organization could provide their loved one. **Team Member A** takes down their contact info and asks a few basic questions about their loved one.
2. **Team Member B** calls back the **Family Member** the next day, leaves a voicemail when they don't answer, and then sends an email to find a good time to connect.
3. **Family member** emails back to schedule a call the next week.
4. **Team Member B** and the **Family Member** connect over the phone. **Team Member B** runs through some questions to determine if the organization and potential beneficiary would be a good fit. They are, so **Team Member B** lets the **Family Member** know they will need some documents from the **Family Member** as a next step.
5. **Team Member B** sends an email to the **Family Member** introducing **Team Member C** and shares a list of which documents need to be sent.
6. **Team Member C** reaches out to the **Family Member** a week later when documents have not been received
7. **Family Member** replies and submits the necessary documents.
8. **Team Member C** saves these documents in a folder on the organization's shared drive and notifies **Team Member D** that the beneficiary is ready to begin onboarding.

Map out your team's processes (continued)

In this example, we can identify several areas where a CRM could help streamline this workflow:

- Creating a Contact Form that lives on the website that family members can use to provide contact info and basic beneficiary information;
- Using this information to create a "prospective beneficiary" account in the CRM;
- Setting up alerts so Team Members B, C, and D know when they need to take action on a new beneficiary. Team Members can assign next steps to the appropriate colleague from the CRM;
- Provide a scheduling link to Family Member so it's easy to schedule calls when Team Members are available;
- Creating an internal form that Team Member B can fill out while on a call / in-person meeting with Family Member. This info will get attached to the "prospective beneficiary" account for all team members to see;
- Automatically send follow-up emails if Family Member doesn't take action after a certain amount of time has passed;
- Creating template emails for scheduling a call, sending important documents, etc. which can be customized before being sent;
- Move beneficiary into the onboarding workflow, once their account status has been updated to "onboarding beneficiary" by Team Member C, this will automatically notify Team Member D to take first onboarding steps.

While creating step-by-step instructions for your team's common processes may feel cumbersome, it can be crucial to setting up a CRM foundation that actually works for your organization. It can also help bring clarity about who is responsible for what on your team, and eliminate inefficiencies, gaps in a process, or duplicative work.

Identify your top priorities

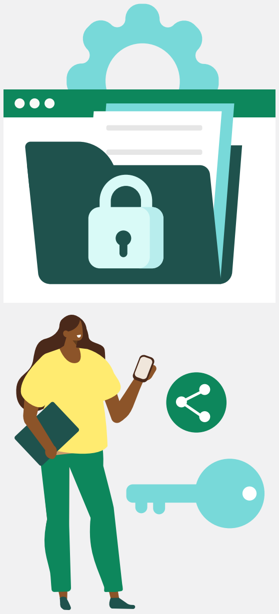
Once you've laid out your team's common processes, you'll need to determine which of these are most important. Building out a CRM system takes time, so you want to focus on getting your core, non-negotiable use cases up and running first. These questions can help you decide on what should be prioritized:

- Which processes are most time-consuming, inefficient, or prone to human errors?
- What topic is your team spending the most time on when communicating with beneficiaries or other stakeholders?
- What could have the greatest impact on your beneficiaries' well-being if it was sped up, more clearly communicated, or improved in some other way?
- What data do you need to have access to for things to continue running smoothly?
- What are the most important reports you'll want to be able to pull?

Creating your Reports, Dashboards, & Audit Trails

Early CRM implementation is as much about setting up reports, dashboards, and audit trails as it is about specific task/process functionality. As your high-priority use cases get set up, you'll also want to ensure you're building the appropriate reporting into the CRM and tying related tasks to a dashboard view to make things easier to manage. Here are some examples:

- **Program Impact Dashboard -** Visualization of the impact of specific programs or services, including beneficiaries served, outcomes achieved, and comparison against goals.
- **Donor Contribution Reports -** Detailed records of all contributions, segmented by donor type (individual, corporate, foundation), size of donation, and purpose (e.g., unrestricted, earmarked for specific programs).
- **Beneficiary Engagement -** How many beneficiaries did the staff speak with this month? When was the last date of contact for each beneficiary? Which initiatives did they engage in?
- **Data Access and Changes Audit -** Log of all access to sensitive data and any changes made, including who made the change, what was changed, and when.



Establish strong security protocols

While many CRM tools come with data encryption and other security measures to protect beneficiary information and ensure compliance, there are some steps you'll need to take when implementing a new CRM to make your system – and the data inside of it – more secure.

1. **Setting clear roles & controls -** Each CRM user can be assigned a role, and different functionality within the CRM can be restricted to only certain roles. CRM providers typically recommend that users only have access to the information (e.g., beneficiary contact info) and functionalities (e.g., updating sensitive data fields) necessary for their role.

2. **Data Backup and Recovery -** When you're setting up your CRM, you'll want to define where and when data is backed up and how it can be recovered in the case of a security breach or data loss incident.

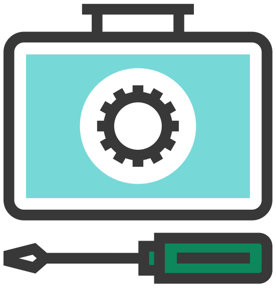
3. **Rules for usage -** If you don't already have protocols for password management, two-factor authentication, or public WiFi and personal device usage, now is a good time to establish these rules and help your team get up to speed with these protections.

Document systems of truth

Integrations with other systems can be a big part of a CRM's value, but it's important for your team to know what types of data should be updated within the CRM, and what data comes from other systems and should not be edited within the CRM. Having a clear source of truth – or "system of record" is helpful if the data is compromised in some way. In the implementation process, you'll want to use this documentation as a guide to determine what systems "read" from the CRM and which ones "write" to it.

Identify (and support) your team's CRM admin

It's safe to assume that your CRM system will continue to need additions or updates after the implementation process. And while it's a good idea to train anyone using the tool about how to make changes, many organizations find it helpful to choose someone on the team as a CRM superuser/administrator. Once you've identified this person, make sure they have the bandwidth and resources they need to get up to speed on the platform and establish this as an official part of their responsibilities. A well-functioning CRM is critical to the success of your organization, so this work should be prioritized.



Test test test

Before you roll out the CRM to your full team and contact list, it's a good idea to test it with a couple of team members first. A dedicated testing period can catch errors or mistakes before they become more widespread and cause headaches down the road. This is not only good for your beneficiaries and the trust – proper testing can help you avoid frustrating employees with a system that doesn't work or meet their needs.

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Common Pitfalls to Avoid During CRM Implementation

In addition to the "Dos" of implementation above, there are also some "Don'ts" that many non-profit trustees will want to avoid when setting up their CRM.

Don't just reassemble the wheel

If you're implementing a new CRM, step back and question how you used your old system before rebuilding those processes into your new CRM. Your shiny new system is an opportunity to set things up in a new and better way; if you simply copy your old system's settings you risk not taking advantage of faster, easier, and more efficient ways of doing things. Take a critical look at the processes you mapped out earlier and consider where things could be improved. Are there steps that could be skipped? Communications that could be automated? Other tools that could be integrated? A different person that should be involved? A different approach to organizing your data? Another way you wish you could view information?

Don't over customize

While CRM customization can be valuable, creating too many bells and whistles and custom functionality can overcomplicate your CRM and make it difficult to use or update. And this can get expensive! The more you go off the beaten path from the core "out-of-the-box" use cases a CRM provides, the more your organization may need to rely on specialized knowledge to maintain your CRM and its processes.

Don't sync your data in two directions

While you want your integrated tools to talk to each other, it's important to set clear parameters about where data is being updated and which systems are the "source of truth."

Any piece of data should be able to receive manual updates in one, and only one, database. For example, you may have multiple systems – True Link, your CRM, etc. – where you want to store and view beneficiary addresses. That is not a problem. But, in your setup you need to decide the source where your team will make changes to the address if a beneficiary moves. Let's say you choose the CRM as the tool where beneficiary contact info gets updated. When a beneficiary moves, a team member will go into the CRM and make that update. And if your data is synced appropriately during implementation, you will see that address change reflected in True Link and other relevant systems.

In another example, some fields – like account balances in True Link – are generated automatically and don't need to be manually updated. In this case, True Link would be the source of truth for this data, and updates to the account balance would be pushed out to the CRM and other relevant systems. Of course, we're happy to work with our clients to make sure your CRM is integrated appropriately with True Link's solutions.

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The All-in-One Financial Solution for Non-Profit Trustees

With True Link, non-profit trusts get access to fully integrated investment management*, a trust administration platform, and spending management with the True Link Visa® Prepaid Card.

The True Link Financial Suite

Our complimentary software for investment* clients can simplify your trust administration in a number of ways, and it integrates with all of the top CRMs (in the next section we'll walk through how to set up your CRM's integration with True Link). Here's a closer look at some of the benefits our clients enjoy:

Comprehensive Financial Management
Streamline your workflows with all pooled and/or non-pooled trust or beneficiary information in one place.

Cash Management and Distributions
Pay bills, disburse funds, and more, all from the easy-to-use True Link Trust Administration Platform.

Recordkeeping and Reporting
The True Link Trust Administration Platform features built-in recordkeeping and reporting to help save time and avoid complexity.

Team Management and Permissions
Customizable team management, permissions, disbursement and deposit workflows, and more.

Beneficiary Portal
Flexibility to grant access to beneficiaries and advocates to view statements and request distributions.

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Integrating Your CRM & True Link for Compounding Benefits

On their own, a well-implemented CRM or the True Link Financial Suite can help improve how you manage your organization's relationships or your beneficiaries' needs. But when you weave these tools together, the benefits of both systems are even greater. By eliminating redundant processes like duplicate data entry and helping your team have the financial information they need at their fingertips, integrating True Link into your CRM system and workflows can improve efficiency without adding complexity. Here's a deeper dive into what an integrated experience can provide.

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Manage beneficiaries' financial lives

- Sub-account opening/closing
- Disbursement approval workflows
- Disbursement fulfillment and check mailing/printing
- Deposit information tracking
- Robust transaction history and reporting
- Sub-account statements
- Beneficiary portal access
- Budget tracking
- Core demographic info
- Quick notes and tracking

API Integration

- Eliminate duplicate data entry
- Facilitate updated and accurate data across systems
- Coordinate actions (e.g., sub-account opening/closing)

CRM of Choice

Manage your organization's relationships and communications

- Grow client base, stay in front of prospects, identify referral sources, onboard new clients
- Track beneficiary interactions in one place, streamline communications, access documents easily
- Team task collaboration, track time, create bills and invoices
- Track team changes in detail, send documents for signatures, build custom reports
- Track donors to manage relationships and use apps for added functionality

At True Link, we're focused on helping your team spend less time on administrative tasks and more time on what truly matters – providing beneficiaries with the care and support they deserve. We do this by increasing your organization's efficiency, accuracy, and understanding of your clients' financial needs and behaviors, but we know that money management is only one aspect of your work. Recognizing how critical CRM tools are to the operations of many non-profit trusts, we are continuing to invest in our CRM integration capabilities.

Have questions about how to integrate True Link with your current CRM or looking for more personalized guidance from our team?

Reach out at invest@truelinkfinancial.com

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About True Link

True Link is a proud member and supporter of the non-profit trustee community.

True Link exists to provide financial solutions for people with complex needs and the people who care for them. We founded the company to make life better for our own loved ones, and we're honored to serve vulnerable elders, people with disabilities, and people in recovery – and their families and professional caregivers – day in and day out.

truelinkfinancial.com/nonprofit-trustee

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