



# Advocacy Databases

# 2015

This report includes the results of the 2015 advocacy database survey conducted by the RE-AMP Organizing Hub. It reports on the various customer relationship management systems (CRMS) in use within the RE-AMP network, compares their functionality, cost, integration with email and donor management platforms and pros and cons of the most widely used platforms as reported by users within the network.

A survey of  
RE-AMP  
members



**NationBuilder**

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## About RE-AMP

RE-AMP is an active network of nearly 160 nonprofits and foundations across eight Midwestern states working on climate change and energy policy with the goal of reducing global warming pollution economy-wide 80 percent by 2050.

RE-AMP brings environmental, labor, faith, youth, energy, conservation and other groups together to develop common priorities to achieve our goals in the areas of clean energy, coal, energy efficiency, global warming solutions, and transportation. With a wide array of member organizations, RE-AMP provides many opportunities for various constituencies throughout the Midwest.

To help meet RE-AMP's goal of reducing global warming pollution 80 percent by 2050, the RE-AMP Steering Committee created the RE-AMP Organizing Hub. The Organizing Hub brings together targeted policy campaigns and movement building, to build power for long-term success. The Organizing Hub focuses on campaign planning, strategy coaching and campaign skills-building for RE-AMP members. For more information about RE-AMP or the Organizing Hub, please visit [www.reamp.org](http://www.reamp.org).

## Executive Summary

In spring 2015, the RE-AMP Organizing Hub surveyed RE-AMP’s nearly 160-member network to gather information about the advocacy databases in use within the network. This report provides the results of that survey, including information and reviews of the customer relationship management systems (CRMs) used by members of the RE-AMP network, how those worked with their advocacy, fundraising and electronic communication efforts, costs, and general notes about functionality. The highlights from this report include:

- There is no database silver bullet. Very few organizations reported being “Extremely satisfied” with their system, and the average rating members gave their current system was 3.14 on a 1 to 5 scale, with 1 being “Not at all satisfied” and 5 being “Extremely satisfied.” Further, we found no correlation between cost and satisfaction levels within the network.
- Five CRMS most often serve as a one-stop shop database (serving advocacy, donor, membership and/or communication functions) within the network. These are: Databank, Nationbuilder, NeonCRM, Salsa and Salesforce.
- Most organizations use more than one system, rather than combining all functions into a single database.
- For individual platforms, cost varies based on a variety of factors, including:
  - number of names/ emails/ contacts in a database
  - use of a consultant to tweak and customize the platform
  - data migration costs
- Half of survey respondents reported spending less than \$2,500 a year on the combined functions of data management, email, advocacy and fundraising.
- The top five most used CRMs in the RE-AMP network are summarized in the table below, as reported by survey respondents:

Criteria	Databank	Nationbuilder	NeonCRM	Salesforce	Salsa
Overall satisfaction rating*	4	4.5	3	3	3
Affordability	\$\$\$	\$	\$\$	\$\$	\$
Email integration	Yes	Yes	Yes	Yes	Yes
Donor tracking	Yes	Yes	Yes	Yes	Yes
Grasstops tracking	Yes	Yes	Yes	Yes	Yes
Advocacy database functions	Yes	Yes	No	No	Yes

\*Based on a scale of 1-5, with 1 being "Not at all satisfied" and 5 being "Extremely satisfied"

## Introduction

Accurate, relevant and updated data on your donors and activists is key to successful fundraising and advocacy efforts, but managing that data can be a headache for many organizations. We wonder, “Is it better to have a single general database that can handle multiple functions, or multiple specialized databases that talk to each other? What options are available currently for organizations looking to manage their membership, donor and advocacy activity? What works for other similar organizations? What total costs can an organization expect to incur for these packages? Is there a silver bullet database that other organizations have found to manage all of their data needs?”

In spring 2015, the RE-AMP Organizing Hub set out to help RE-AMP members answer these questions. We found a variety of advocacy database platforms used within the network, with several that stood out as being most often used, but alas, no silver bullet. Not all CRMs functioned as advocacy databases, not all advocacy databases did a satisfying job of tracking donor and fundraising data, and not all fundraising databases integrated well with advocacy databases or other types of CRMs. As such, many organizations have elected to manage multiple systems and transfer the data back and forth. Still, some databases emerged as providing high functionality for advocacy organizations, either combined with each other or as stand-alone programs, based on particular organizational needs. Those programs are: Databank, Nationbuilder, NeonCRM, Salsa, and Salesforce.

## Methodology

We used the online survey tool Survey Monkey to survey RE-AMP members in April 2015. The survey link was sent out on the RE-AMP commons to all RE-AMP members with two subsequent reminders to complete the survey. We also sent direct, personalized emails to 47 member organizations that had participated in RE-AMP Organizing Hub programs and services and asked them to complete the survey. In total, 46 responses were received, with 39 organizations completing the survey by providing full data about their advocacy databases, fundraising, and email platforms.

## Limitations

The data had some limitations. For instance, organizations reported on the combined cost of multiple platforms they use (e.g., Salesforce and Salsa), which made it difficult to attribute firm numbers to individual platforms. We have done our best to research the comparative cost between the top five

most used consumer relationship management systems, however, costs will vary for your organization based on a variety of factors. In some cases, where very few organizations used a particular platform, ratings for those platforms may be biased because the data were not robust enough to do a more rigorous statistical analysis. Additionally, this survey was limited to RE-AMP members, and thus does not include a wide swath of organizations that use advocacy databases, which may have affected the type of data we received. Finally, the results presented in this report are based on responses to the survey, and hence, are only as accurate as the information provided. Because of these limitations, we recommend that readers use this report as a starting point for their research into advocacy databases, but complete a thorough evaluation, including participating in demos, of any potential new database before investing organizational resources into one.

## Main Findings

This section of the report includes overall satisfaction levels with data management platforms, which customer relationship management systems, email platforms and fundraising database platforms are most used within the network and how well they are (or are not) integrated with each other.

### Overall Satisfaction Levels

While very few organizations reported being “not at all satisfied” with their data management system, there were no standout systems that survey participants identified. Only two organizations indicated they were “extremely satisfied.” Both use at least two systems to track and manage their data. In one organization, they combine Nationbuilder with an independent, internal database for tracking membership, developed specifically for groups in their network. The second organization that reported being “extremely satisfied” combines the Databank and DonorSnap. The average rating for data management systems was 3.14, with 1 being “Not at all satisfied,” and 5 being “extremely satisfied.”

### Customer Relationship Management Systems

The following customer relationship management systems were identified by survey participants as their organization’s data management software, with Salsa and Salesforce dominating the field:

- ActionKit
- Blackbaud
- Databank
- Little Green Light
- Nationbuilder
- NeonCRM
- Salesforce
- Salsa

Many groups reported using more than one system. For example, respondents commonly reported using both Salsa and Salesforce. This is likely because Salsa focuses on advocacy, while Salesforce manages other data needs well, such as fundraising, and non-advocacy communication. It’s worth noting that twelve CRMs were listed as potential options for participants to select in the survey. Respondents were also given a field to indicate other (unlisted) CRMs they use. No organization reported using, thus we did not collect any feedback from members, on the following platforms:

- Blue State Digital
- CiviCRM
- Democracy Direct
- Microsoft Dynamics CRM
- SugarCRM
- Wild Apricot

Based on our research, however, CiviCRM and Wild Apricot may be of interest to RE-AMP members, because of their ability to serve multiple functions (CiviCRM: advocacy/donor/member/communication database; Wild Apricot: donor/ membership/communications) while being relatively inexpensive. While no RE-AMP members reported using these systems, more can be found about them and many others in Idealware’s 2013 report, “A Consumers Guide to Donor Management Systems.”

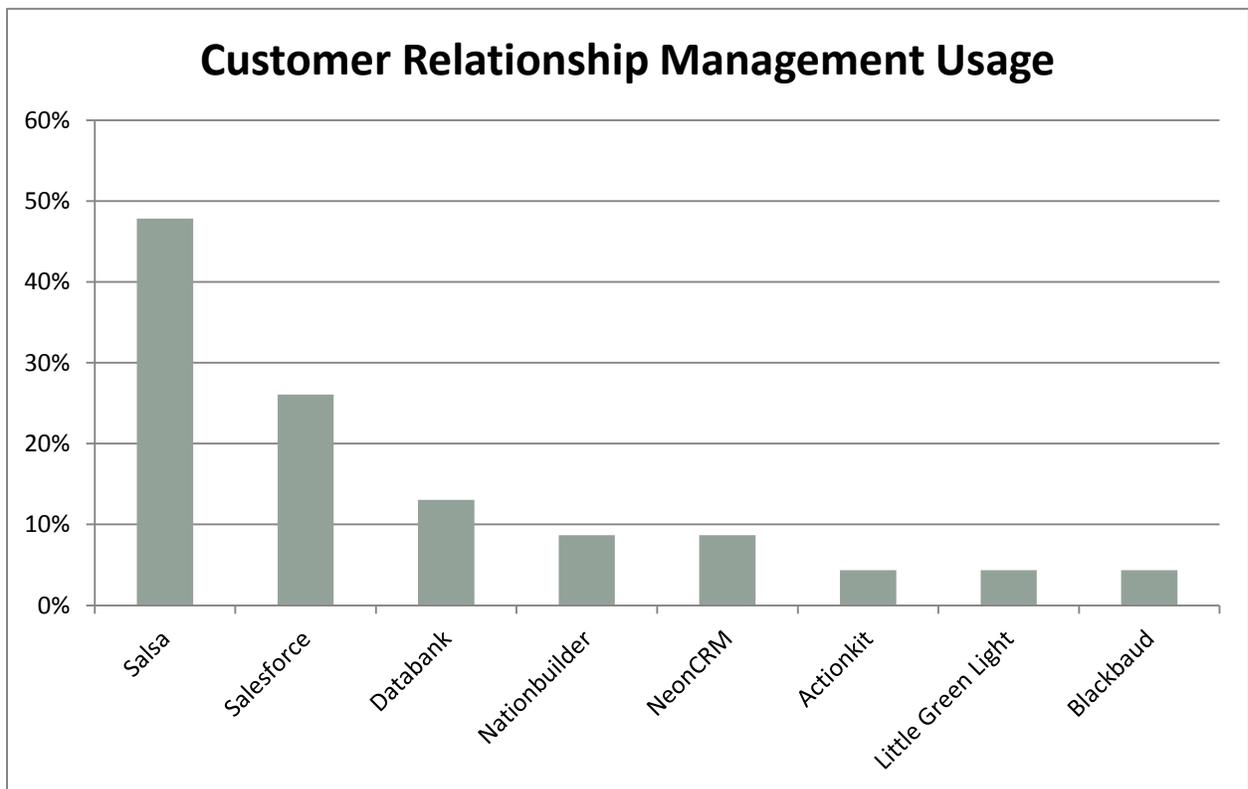


Figure 1: CRMS used within the RE-AMP network, by percent

## Email Programs

Answering, “What email platform does your organization currently use to communicate with members and supporters?” Salsa again dominated the field, with many organizations using the CRM to communicate with their members and supporters. MailChimp was the runner up.

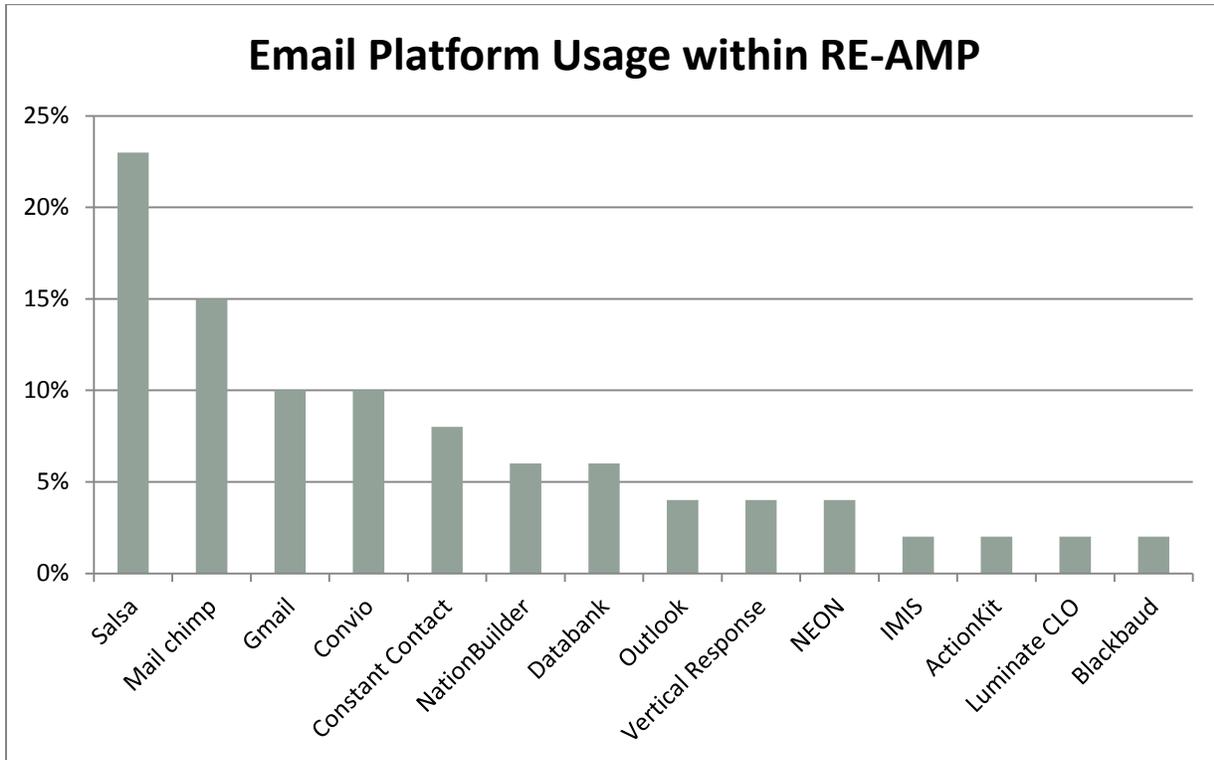


Figure 2: Email platforms used within the RE-AMP network, by percent

## Fundraising Databases

Answering the question, “How does your organization track donors and fundraising data?” 19 groups reported tracking donors and fundraising data in the same database as their member and organizational activity. Of these, Salsa was the most used CRM for organizations that combined their fundraising and organizational/member tracking data into a single system.

The graph below depicts this:

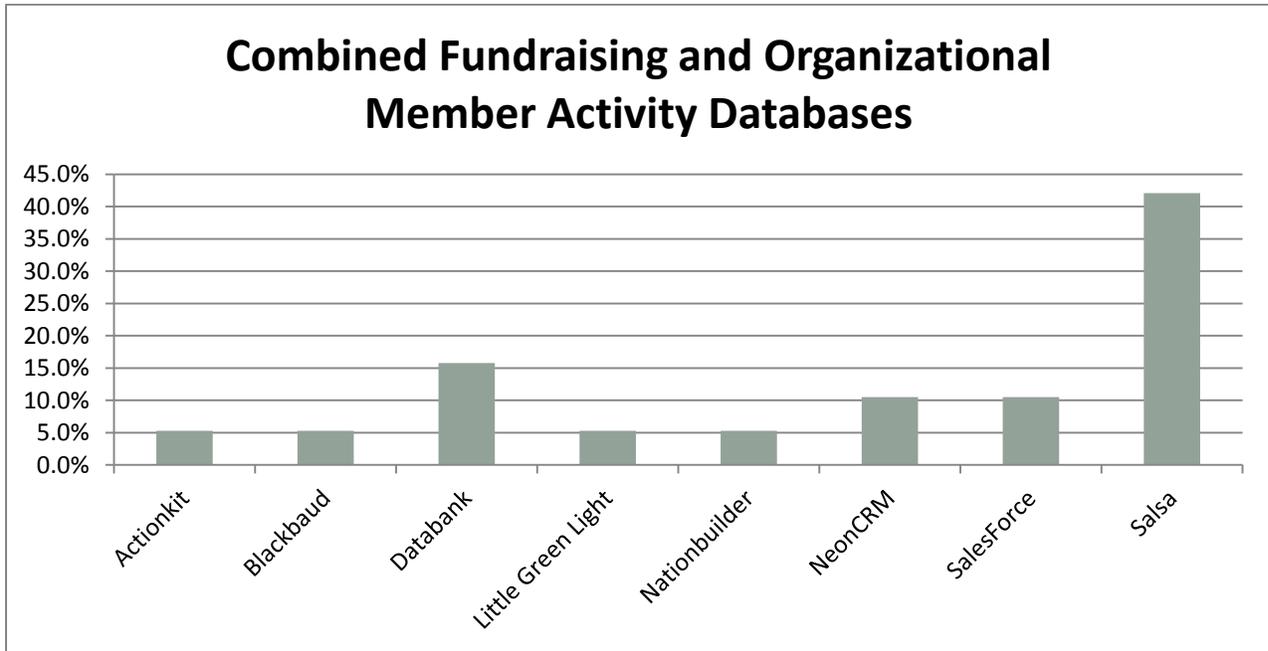


Figure 3: Systems that combine both donor management and constituent member tracking, as used within the RE-AMP network by percent

## Grasstops Tracking

We asked survey respondents if their CRM had the ability to track grasstops (which we define as influential individuals whom have access to decision-makers and with whom you have or would like to cultivate a relationship). Users of the following systems reported both being able to track grasstops and use this feature regularly in their system:

- Databank
- NeonCRM
- Salsa
- Salesforce

One respondent reported that their CRM, Nationbuilder, had the capacity to track grasstops as well, but it wasn't a function they used often.

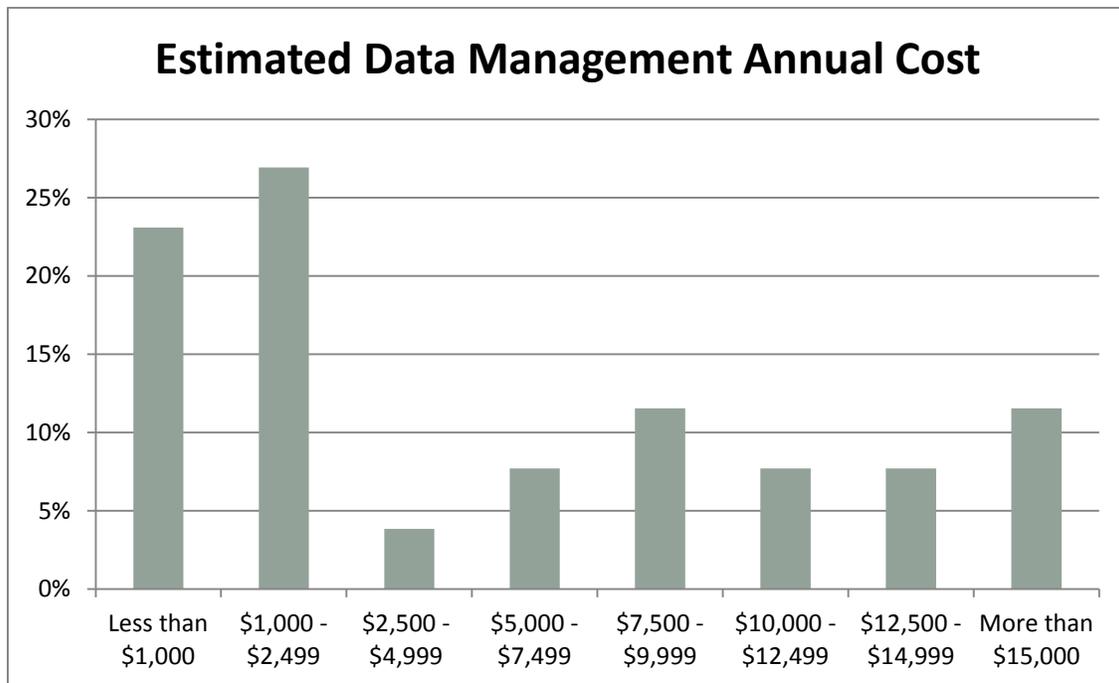
## Cost

Combined costs for email, fundraising and membership/organizational activity data management varied greatly across organizations, with some groups spending less than \$1,000 per year for this expense, and some groups spending over \$17,500. A major factor in cost variations was the number of names/emails organizations were managing. Another major factor was whether the organization had access to a system used by a network or collaborative they belonged to, which reduced costs. For example, Sierra Club's in-house HELEN database lowered costs to individual chapters, while others had access to Salesforce at a reduced cost because of their participation in another network. We did not ask about the cost for individual platforms, but instead asked about the estimated total cost of the combined systems:

*“Thinking about the totality of the programs you use to track donors, supporters, grassroots and grasstops, (i.e. database, advocacy, fundraising and email platforms) what would you estimate your organization pays annually for the suite of programs you currently use?”*

- Half of the respondents to the survey spend less than \$2,500 a year on the combined expense of these programs.

- Nearly 30 percent of respondents reported spending more than \$10,000 a year to manage these functions. Of these, 43 percent also reported using more than one system to manage these functions.
- We did not find a correlation between cost and satisfaction rates. On average, satisfaction rates for those organizations spending more than \$10,000 a year on their systems were the same as those organizations who reported spending less than \$2,500 a year. Both groups averaged a 3.0 satisfaction rating on a scale of 1 to 5 with 1 being "Not at all satisfied" and 5 being "Extremely satisfied."



## Summary Table

The following table summarizes the overall satisfaction rating, affordability, ability to integrate email, donor/ fundraising data and grasstops tracking, and advocacy database functionality as reported by survey respondents for the top five most used CRMs within the RE-AMP network.

Criteria	Databank	Nationbuilder	NeonCRM	Salesforce	Salsa
Overall satisfaction rating*	4	4.5	3	3	3
Affordability	\$\$\$	\$	\$\$	\$\$	\$
Email integration	Yes	Yes	Yes	Yes	Yes
Donor tracking	Yes	Yes	Yes	Yes	Yes
Grasstops tracking	Yes	Yes	Yes	Yes	Yes
Advocacy database functions	Yes	Yes	No	No	Yes

\*Based on a scale of 1-5, with 1 being "Not at all satisfied" and 5 being "Extremely satisfied"

## Additional Resources

### **“A Consumers Guide to Donor Management Systems,” Idealware**

This 160-page guide provides an overview of what the systems do, recommendations based on particular needs, comparison charts, summaries of all 36 systems, and detailed reviews of the top 11 choices: CiviCRM, DonorPerfect Online, DonorPro, eTapestry, GiftWorks, Little Green Light, NeonCRM, The Raiser's Edge(i), Salesforce Nonprofit Starter Pack, SuiteDonor, and Talisma Fundraising. The guide also includes a directory of consultants with experience implementing these systems to help you put the one you choose to work for you.

<http://www.idealware.org/reports/consumers-guide-donor-management-systems>

### **“Technologies and Practices for Managing Outcomes: Lessons From Large Nonprofits,” Idealware**

A report to demystify the outcomes management process and guide nonprofits through the questions they need to ask themselves as they consider the strategy and technology behind how they measure outcomes.

<http://www.idealware.org/reports/technologies-and-practices-managing-outcomes-lessons-large-nonprofits>

### **Tech Soup**

TechSoup is a 501(c)(3) nonprofit that focuses on connecting nonprofits, charities, and public libraries with the technology resources and knowledge needed to operate at their full potential. Registering your organization with TechSoup gives you access to donated and discounted products and services from more than 60 donor partners, including some of the platforms named in this report.

<http://www.techsoup.org/>

# Appendix A: Database Major Features and Pricing

## ActionKit

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<http://actionkit.com>

### *Major features include:*

#### **Advocacy**

- Online petitions
- Send messages and make calls to representatives
- Send letters to the editor
- Recruit users to invite their friends via email or social media to take advocacy actions

#### **Events**

- Allows you to ask your users to host local events
- Set up centralized events

#### **Fundraising**

- Customizable asks based on donor history
- Accept recurring donations and “in memory of” gifts, etc.

#### **Mailings**

- Direct mail and email campaigns
- Allows you to target by geography, user history and more
- Run A/B tests
- Set up scheduled or recurring e-mails
- Send email blasts

#### **Website**

- Mobile-friendly templates to match your organization’s brand
- Tracking of clicks, actions, and sources of users

### *Pricing:*

ActionKit starts at \$995 a month for groups with up to 50,000 records, plus a set-up fee.

## Blackbaud/ Raiser's Edge

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<https://www.blackbaud.com/fundraising-and-relationship-management/raisers-edge>

### *Major features include:*

#### **Fundraising**

- Donor database
- Relationship tracking
- Batch gift entry
- Fundraising appeal and acknowledgements templates
- Major/planned gift cultivation and tracking
- Pledge and recurring gifts management

#### **Mailings**

- Direct mail
- Email marketing
- Social media
- Address finder

#### **Membership/ Organizational Activity**

- Membership database
- Volunteer management

### *Pricing:*

Based on software package and services. Contact Blackbaud for more information.

## Databank

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<https://www.thedatabank.com>

### *Major features include:*

#### **Advocacy**

- Send messages to representatives
- Facebook app integration
- Elected officials search

- Conduct polls

#### **Email Communications**

- Email database
- Email templates
- Spam analysis
- A/B testing

#### **Fundraising**

- Donor database
- Accepts online giving
- Bulk email appeals and branded and personalized emails
- Take pledges and recurring gifts

#### **Membership/ Organizational Activity**

- Membership database

#### *Pricing*

Less than 5,000 records: \$99/month - \$475/ month (monthly cost depends on type of package selected), plus \$250 one-time setup fee.

More than 5,000 records: contact The Databank for pricing.

### **Little Green Light**

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<http://www.littlegreenlight.com>

#### *Major features include:*

##### **Events**

- Create invitation lists, send out invitations, and track RSVPs
- Record gifts associated with the event

##### **Fundraising**

- Donor database
- Accepts online giving
- Take pledges
- Batch gift entry

- Grant tracking

### **Membership/ Organizational Activity**

- Membership database
- Volunteer management

### *Pricing:*

- Less than 5,000 records: \$49/month or \$529/year
- Up to 10,000 records: \$59/month or \$637/ year
- Up to 20,000 records: \$69/month or \$745/ year
- More than 20,000 records: see <http://www.littlegreenlight.com/pricing>

## **Nationbuilder**

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<http://nationbuilder.com/>

### *Major features include:*

#### **Advocacy**

- Send messages to representatives
- Facebook app integration
- Elected officials search
- Phone banking
- Online petitions
- Mapping & turf cutting
- Voter file with precincts, vote history, phone numbers (in most states), party registration, ethnicity, and address

#### **Email Communications**

- Email database
- Email blasts
- Templates

#### **Events**

- Create invitation lists, send out invitations, and track RSVPs
- Record gifts associated with the event
- Allows you to ask your users to host local events

## **Fundraising**

- Donor database
- Accepts online giving
- Bulk email appeals and branded and personalized emails
- Take pledges and recurring gifts

## **Membership/ Organizational Activity**

- Membership database
- Volunteer management
- Match your email list to Facebook profiles, other social media

## **Website**

- Mobile-friendly templates to match your organization's brand
- Tracking of clicks, actions, and sources of users

### *Pricing:*

- Less than 5,000 records: \$29/month
- Up to 15,000 records: \$49/month
- Up to 100,000 records: \$199/month
- More than 100,000 records: see <http://nationbuilder.com/pricing>

## **NeonCRM**

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<https://www.z2systems.com/neoncrm/features/nonprofit-crm>

### *Major features include:*

#### **Email Communications**

- Email database
- Email blasts
- Templates

#### **Events**

- Create invitation lists, send out invitations, and track RSVPs
- Record gifts associated with the event

#### **Fundraising**

- Donor database
- Accepts online giving

- Bulk email appeals and branded and personalized emails
- Take pledges and recurring gifts

### **Membership/ Organizational Activity**

- Membership database
- Volunteer management

### **Website**

- Tracking of clicks, actions, and sources of users
- Member only content

### *Pricing:*

- Less than 5,000 records: \$99/month
- Up to 15,000 records: \$149/month
- Up to 75,000 records: \$399/month

## **SalesForce**

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[www.salesforce.com](http://www.salesforce.com)

### *Major features include:*

#### **Email Communications**

- Does not have an email component but can synch up with email platforms (e.g., MailChimp)

#### **Fundraising**

- Donor database

#### **Membership/ Organizational Activity**

- Membership database
- Volunteer database

### *Pricing:*

- Can be free for nonprofits, but cost comes from consultants to customize the platform for your organization and the cost of other programs your organization uses and integrates with Salesforce.

### *Major features include:*

#### **Advocacy**

- Send messages to representatives
- Online petitions
- Send letters to the editorial boards of national and local newspapers

#### **Email Communications**

- Email database
- Email blasts
- Templates

#### **Events**

- Create invitation lists, send out invitations, and track RSVPs
- Record gifts associated with the event
- Social media integration

#### **Fundraising**

- Donor database
- Accepts online giving
- Bulk email appeals and branded and personalized emails
- Take pledges and recurring gifts

#### **Membership/ Organizational Activity**

- Membership database
- Volunteer management

#### **Website**

- Webpage templates
- Tracking of clicks, actions, and sources of users

### *Pricing:*

Based on software package and services. Contact Salsa for pricing information:

<https://www.salsalabs.com/request-pricing-information-salsa>

## Appendix B: Member Reported Pros and Cons

We asked respondents about what they liked and what they didn't like about each particular platform. We've included those comments below, with light editing for grammar and context.

### BLACKBAUD/ RAISER'S EDGE

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blackbaud®



#### *Pros*

- The Raiser's Edge/Blackbaud help community is extensive, with a user forum, "how-to tutorials" that are self-guided, and online chat feature (I believe this is all extra \$\$ though). It's been a big help in learning how to use the system, virtually on my own (following staff turnover). However, even though the live chat/follow-up staff are truly great, it can be a total time suck.

#### *Cons*

- Raiser's Edge is too complicated for new staff.
- Raiser's Edge is very expensive and doesn't play well with other programs.



### DATABANK

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**thedatabank**  
TECHNOLOGY FOR CHANGE™



#### *Pros*

- We can track legislative alerts that have been automatically generated through our data system.
- All of the important stuff is in one place. One staff person is the expert, but we all have access to the system. We cross reference to the VAN and are able to provide an enhanced data base for joint databank action alerts.

- The price is right - The monthly fee is cheaper if you pay 12 months in advance and it includes all modules. For us, it is a savings of several thousand dollars per year.
- Combines donor, membership support, and advocacy.
- Great customer service.
- All in one system for tracking all our relationships and their level of activity.

### *Cons*



- About the only thing is when you use the "mass entry" function you cannot pull reports from it.
- Expensive.
- Clumsy at times and does not easily do certain small things, like listing multiple emails for a single contact.
- (Sometimes) they change the system to be more uniform but as a result (it) causes us to lose some of the functionality our organization built into the system for our own use.

## NATIONBUILDER

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### NationBuilder

### *Pros*

- Very powerful, lots of options.
- It lets us effectively track how members interact with us and helps us to improve our outreach and online fundraising. It allows us to provide at least some database access to many employees, as opposed to the other internal database we use, which must be accessed through a mightily overworked gatekeeper. Their support is also good. We were one of their first non-profit customers and they have augmented their product a few times to accommodate our unique needs. Since we have so many email addresses (and add more all the time), an early appeal was that there was no price hike for adding more emails to the system, like there was



with Emma, our old email system. We also like that there's lots of headroom to develop how we use the system. We are slowly becoming more sophisticated in our online outreach and fundraising and Nationbuilder has always allowed us that room to grow.

### *Cons*

- Not very easy to train new people to use.
- It's pricier than the functionality we got out of it at first, but we are making up that gap...It's also not as geared toward our type of organization as we'd like, but they are somewhat willing to work with us to develop or change features to suit us.



NEONCRM

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neon CRM

### *Pros*

- Greater integration for greater efficiency! We are able to set up subscription, registration, donation pages, and more, that sync automatically with our database.
- The cost is far more in line with our needs (actually much better aligned) than Raiser's Edge, our previous database. We feel this is a future-forward database and that we can grow with it because updates are included instead of (costing) additional money.



### *Cons*

- Not intuitive; difficult to link households, and make multi-year pledges; reminders are not too helpful; and distinctions between donors and funders (foundations) are not clear.
- Monthly fee goes up with more constituents added.
- Filters for reports are limited.



- A minor thing but it has created some inner dilemmas because it's so integrated - do you train all the communications and development staff on the back-end so that they can continue doing the work they used to do? Or have one person that cuts across programs?

## SALESFORCE

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### *Pros*

- We are in the midst of a major overhaul and transition from a Salsa/Raiser's Edge combo to a Salsa/Salesforce combo. Things are in a lot of flux right now.
- It's much more efficient than the Databank for email advocacy and pulling send lists. It has many more capabilities than the Databank - many that we don't yet know how to use.
- We have a customized version of Salesforce that integrates with Salsa for online advocacy, Vertical Response for email blasts, and Click and Pledge for online donations and online event registration so it can do everything we want it to do. We choose this option because of the price. An integrated system that handles donor management, online advocacy, online emails, and online fundraising and event registration was too expensive. WaterGrass (customized version of Salesforce through River Network) is affordable. The initial data transfer and setup fees were a bit expensive for us, but the yearly support fees are pretty inexpensive plus Vertical Response and Click and Pledge are free.
- Can be manipulated based on needs. Lots of service support (for) size of organization.

### *Cons*

- Because it's a Blackbaud/Salesforce system, our needs are tiny fish in an ocean. The system doesn't customize all that well to how we need it to work, and



sometimes there are just too many options to wade through to get an email set up, a list pulled or to track donor relationships. Also, not much about it is intuitive. It's easy to get very lost in the system.

- The integration between Salesforce and Salsa could be better because it is only 1 way integration from Salsa into Salesforce. We have difficulty with duplicates between Salsa and Salesforce and from online donations not matching existing records due mainly because people have many different email addresses and the systems are not setup to handle checking on multiple email addresses.
- Too many steps and requires constant use to be truly effective. Our own organizational trouble is to create usage procedures to facilitate clean flows and organization.
- Salesforce is very powerful which is great, but you also have to spend a lot of time to make sure you are setting up everything correctly to get the data that you want out of it. After now using the systems for a while, I understand more their limitations and how I would like to customize things, but using consultants to do that is expensive. Luckily, I enjoy trying to figure database questions out on my own, but not everyone in the office is good at that. Plus you could spend a lot of time working on it, which is not an option when there is so much other work to be done.

SALSA



### *Pros*

- Good features and it is affordable. We can do pretty much everything we need to with Salsa.
- Tracking and auto generated information is helpful. Group usage is easy.
- It allows us to do email outreach, create action and donation pages, and manage all of the resulting data in the same system.
- Salsa has been fairly easy to use and intuitive, versus the system we used to use.
- Tracks all members and constituents in one place from donations, emails, actions, and we can manage contacts (phone, letter, etc...) Can manage events from within it as well.



- We were excited that Salsa is compatible with GiftWorks, but need help figuring out how to maximize both.



### *Cons*

- Salsa is kind of a pain a lot of the time. I find it to be fairly clunky and it's difficult to get help with using it. They don't have a live chat for help or anything, so you mostly have to rely on pretty old user posts in the salsa commons. If they had better help features I wouldn't mind the clunkiness of it so much. By clunky I mean it's not a very intuitive platform, and it takes a lot of time to figure out how to get things right, from formatting text to crafting online actions to just inputting members even. Sometimes I wonder if it's really worth it just because of how much time it takes to use and figure out!
- Ugly! Doesn't integrate cleanly with our website or brand standards both through emails and website. Formatting is too challenging and not always an option.