CLOUD PRO ADVISOR
Smart Integrations.

A Custom CRM for a Nonprofit

Unifying donor, sponsor and outreach data —
without another monthly CRM bill.

The challenge

A mission-driven nonprofit came to me with a problem familiar to almost every small organisation: their data worked, but their tools didn't talk to each other.

Donor and sponsor records lived in **QuickBooks Online**. Their newsletter audience and campaign history sat in **Mailchimp**. Meetings, emails, shared docs and calendars ran on their **Google Workspace for Nonprofits** account. Every time a team member needed a full picture of a contact — past giving, last email opened, most recent conversation, pipeline stage — they had to log into three tools and stitch the answer together by hand.

> *"Why buy a fourth system to manage the three we already have?" — the question that started this build*

Why not just buy a commercial CRM?

- **Per-user pricing** on nonprofit budgets adds up fast — and punishes growth.
- **Migration duplicates data** the organisation already owns and maintains elsewhere.
- **Staff adoption** is hard when the team has to abandon the tools they already know.
- **Vendor lock-in** means every future change is on someone else's roadmap, not yours.

My approach

Instead of replacing anything, I built a lightweight custom hub that reads from — and writes back to — the systems already in place. QuickBooks stays the source of truth for contacts and giving. Mailchimp stays the engagement record. Google Workspace stays the day-to-day workspace. The hub simply ties them together into one screen and adds the workflow pieces a CRM is supposed to provide: pipeline, activity logging, follow-ups and templated outreach.

Key features

Every custom build I deliver is designed around the same six principles — what I call the **BRIDGE** framework. It's how a scattered set of tools becomes one coherent workflow.

B

Built on your stack

QuickBooks, Mailchimp and Google Workspace stay as the sources of truth. Nothing to migrate, nothing to re-learn, no duplicate data entry.

R

Records unified

One search bar finds a contact across every connected system. Opening a record shows giving history, campaign engagement, recent emails and upcoming meetings on a single screen.

I

Inbox integration

A Gmail side-panel pops the full contact record open next to any email thread. No switching tabs. No copy-paste. The context is just there.

D

Dashboard pipeline

Configurable stages for sponsors, donors and prospects. One-tap stage changes. Pipeline totals update live so leadership always knows what's in play.

G

Generative AI drafting

A reusable template library with merge fields (first name, last gift, sponsor level) plus one-click AI-written emails that staff can edit before sending.

E

Everywhere

A mobile-friendly web app embedded on the organisation's own website. Board members can check prospects from anywhere; staff can log a meeting from the parking lot.

How I built it

The hub runs on Google's own platform, which means it inherits the organisation's existing security, permissions and login — no extra accounts to manage, no data leaving their domain.

1

Mapped how the team actually works

Interviewed staff and board members to pin down where the real friction was — not a generic CRM wishlist, but the specific handoffs and lookups that ate time every week.

2

Connected the existing stack

Wired QuickBooks, Mailchimp and Google Contacts into a single read/write layer, so a change in one place shows up everywhere it needs to — without duplicate entry and without overwriting the source of truth.

3

Built two front ends from one codebase

A Gmail side-panel for staff who live in their inbox, plus a mobile-friendly web app embedded on the organisation's website for people on the go. Same data, same logic, two shapes.

4

Shipped and iterated

Rolled out to a small group first, tuned the workflow based on real use, then opened it up to the whole team. New features continue to land in short cycles as the organisation's needs evolve.

Because the stack is code the organisation owns, a new pipeline, a new report or a new integration is a quick update — not a six-figure vendor roadmap.

What changed day-to-day

A few of the everyday moments where the hub earns its keep.

Reading an email from a donor

Before: Open the email, switch to QuickBooks to check giving history, switch to Mailchimp to see what campaigns they've opened, switch back to reply — four tabs, five minutes.

After: Open the email. The full contact record appears in a side panel: giving total, last gift, current stage, last conversation. Reply in context in under a minute.

Logging a meeting with a sponsor

Before: Scribble a note in a shared doc, put a follow-up on your own calendar, hope someone remembers to update the sponsor's record in QuickBooks.

After: One form logs the meeting, schedules the follow-up on the right calendar with the right guests, updates the pipeline stage, and makes it searchable from any device.

Running a tailored email campaign

Before: Pull a CSV out of QuickBooks, clean it up, upload to Mailchimp, hand-write the email, cross-check that you haven't already emailed these people this month.

After: Pick a segment from the built-in templates, click AI Draft to generate the copy, review, send. Every merge field is accurate because it's reading from live data.

Board member checking a prospect on the go

Before: Wait until Monday, email the office, wait for a reply.

After: Open the mobile app on their phone, search the name, see everything they need right there — giving, engagement, stage, next step.

Could this work for you?

If your team is juggling QuickBooks, Mailchimp, Google Workspace, a shared spreadsheet and a couple of sticky notes to answer basic questions about your customers or donors, you don't necessarily need a new platform. You might just need the one you already have, wired together properly.

The quickest way in is to book a free consultation call. I'll talk through where the friction is and whether a custom build is the right answer for you.

Book a free consultation call

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What a custom build typically includes

- Discovery call to map the real workflow and the real pain points
- Integration with the systems you already use (QuickBooks, Mailchimp, Google Workspace, Trello and more)
- Gmail add-on, mobile web app, or both — whatever suits the team
- Pipeline, activity logging, templated email and AI drafting out of the box
- Hosted and maintained — no server to manage on your side

Every build is scoped individually. Get in touch for a quote — most small organisations run their completed tool for under $10/month in hosting and API costs.