Solving Data Problems: Workflow, Data, Software, Installation

Kathleen Kelley, CFRE

Goal: Efficiently and effectively cultivate, communicate, and fundraise using donor-centric strategies

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Challenges

- ▶ One person is trained
- ▶ Entering data is difficult
- ▶ Tech support is never available
- ▶ Reports are difficult to produce
- ▶ Accounting doesn't match
- ▶ Limited access to info while on the road
- ▶ No automation of acknowledgement
- ▶ Not everyone uses it
- ▶ It doesn't help us achieve goals
- ▶ Can't handle all of our records
- ▶ Does not work from donor perspective
- ▶ Bogus data, can't be trusted
- ▶ Too many bells and whistles that are not used
- ▶ No measurable objectives
- ▶ Fundraising team doesn't understand their role
- ▶ Data is owned by one person

Agenda

▶ Experience/challenges with Data Management

▶ Data management's impact on donor centric fundraising

▶ Simple solutions

▶ Documenting Workflow and Donor Experience

▶ Automate repetitive tasks

▶ Select a system(s)
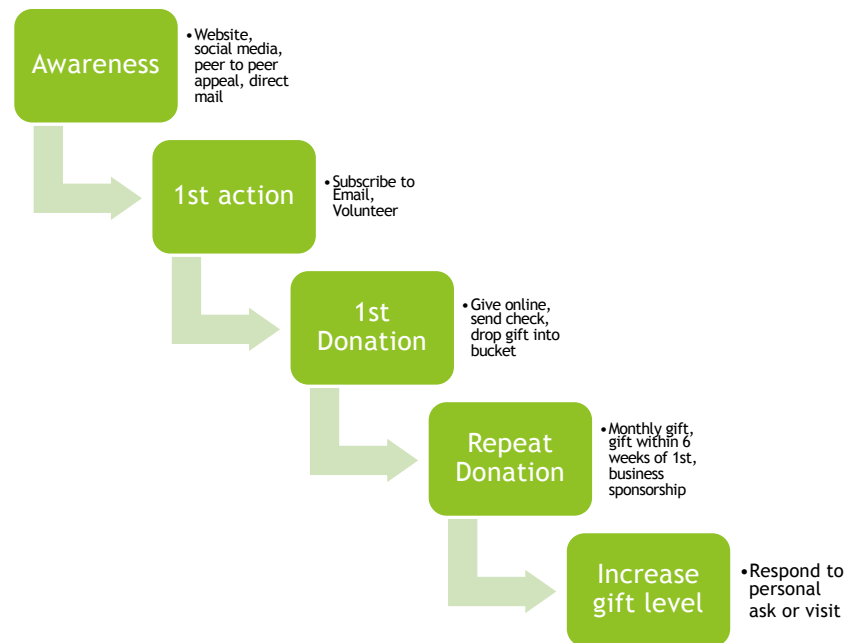
▶ Install a system

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Remember the bottom line is to improve donor centric relations and why donors fail to give...

► Poorly timed, stiff, misspelled, mislabeled and impersonal acknowledgements

► Solicitations ask for money, not for impact

► Organization rarely accountable for spending and achievement

► Donor/Prospect not asked to give, or ask to give at appropriate target level

► Over solicitation of donor

► Sending premiums, token gifts that mean nothing, not related to mission

► Donor/Prospect did not see the "email", letter or the "newspaper advertisement"

► Mixed messages in appeal letter vs. website vs. social media vs. charity rating

► Wrong ask

► Too much donor time required to process a gift

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Simple Solutions

▶ Audit donor data regularly

▶ Train and update system regularly

▶ Cross train so that no one person owns the data

▶ Survey donors for satisfaction

▶ Train board, finance team, and program leaders on the importance of donor centric data collection, data management and on their role

▶ Only add the "bells and whistles" as you need them

▶ Only keep 5-6 years of data on the system; archive the rest

▶ Audit messaging across platforms with marketing team

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Document donor/prospect experience

Awareness
- Website, social media, peer to peer appeal, direct mail

1st action
- Subscribe to Email, Volunteer

1st Donation
- Give online, send check, drop gift into bucket

Repeat Donation
- Monthly gift, gift within 6 weeks of 1st, business sponsorship

Increase gift level
- Respond to personal ask or visit

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Document Repetitive Tasks

▶ Monthly reports for Development Committee or Board

▶ Deposit reports to Finance

▶ Maintain file of communication with donor/prospect

▶ Maintaining current contact info

▶ Estimating revenue and budgeting for expenses

▶ Analyzing the results or progress of a campaign or message or appeal

▶ Identifying prospects

▶ Managing moves management tasks

▶ Estimating personnel time or staffing requirements

▶ Tax acknowledgement of gifts

▶ Coordinating messaging

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What does a CRM do today

▶ Provide 360-degree images of their donors, so the organizations can get to know their supporters inside and out. These profiles allow your organization to better cater your cultivation, communication, and fundraising strategies to specific donors.

▶ Offer constituent profiles, donation tracking, donor cultivation, moves management, member management, event management, Campaign reporting, staff and volunteer scheduling, fundraising task management

What else will a CRM do?

- Maintain valuable institutional memory about donors, volunteers, foundations, corporate supporters.

- Coordinate across the accounting functions, public relations functions, fundraising functions, membership functions, event management functions

- Integrate with website, donation page, email, direct mail communications, apps

- Accessed from anywhere and through mobile phones

- Provide more complete donor data

- Assist in setting priorities

Why you need a CRM?

25%-30% increase in donations if fully utilized and functions become donor-centric

Automate functions to reduce tedious work and staff forgetfulness

Maintain data and message consistency across departments and functions

Capture data that can support stronger/deeper relations

Better analysis of funding opportunities

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- Does the donor interact with website, email, print material, social media?

- Does a volunteer understand the funding cycle?

- Who, how and when is a donor's gift recognized?

- How do we handle donor complaints?

- How do we schedule follow up with foundation granting officers?

- Do we secure matching grants from employers who offer match programs?

- Do development numbers match accounting's?

- Does special event committee and volunteer manager share information with fundraising?

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Consistency Improves Trust and Outcomes

Steps before purchase

Create	Create a process model for donations in your current system; critique it from both staff and donor point of view
Talk	Talk with peers of similar industry and size organizations about CRM's and other app's
Research through	Research NTEN, Idealware, AFP Regional Conferences, Industry specific publications
Determine	Determine your bandwidth and budget for training and data entry. Who and how much are your tracking in this system. Don't overreach!
Project	Project the number of records and users and growth over next 5 years
Set	Set your project budget including some temporary conversion help
Get Buy-in	Get buy-in from all who will use or rely on the system
Sign up	Sign up for some demos

Options are endless
Spend .25-.5% of annual budget

- Network for Good
- Everyaction
- Bloomerang
- Kindful
- DonorSnap
- Snap!Raise
- Etapestry
- ExceedFurther

- Little Green Light
- Salesforce
- GiveGab
- Accufund
- DonorBox
- Panorama
- Givelively
- Raisers Edge

- Salsa
- DonorPerfect
- NeonCRM
- GiveButter
- Keela
- GiftWorks

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Process

▶ RFP with requirements

▶ Send 10 vendors

▶ Evaluate proposals

▶ Chose 3-5 for final conversations

▶ Select and set date for conversion

▶ Schedule your team's time for conversion

▶ Schedule training for everyone

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Steps to convert

Train	Staff, development committee, Accounting
Document procedures	
Review existing data	Consistency, Duplicates, Deceased
Prioritize Migration	what data is missing in old system and how to get it for the new
Complete Data Mapping	Critical that data owner drives this ; going from one type of data structure to another is difficult to comprehend (i.e. Access to Sequel)
Convert and compare dat	Run sample reports
Sunset old system	Create a file of older data not transferred
Use new system	Train with organizational data ; practice using new features
Document new procedures	Insist on and test for data accuracy in 1st quarter; automate with new system
Develop Manual	Link manual to training videos and use for troubleshooting
Sign up all updates	

Data transfer from old to new solution

▶ Clean up the data-
  ▶ Remove old erroneous data and duplicates
  ▶ Look for data consistency (Mr. & Mrs. Smith or Mr. and Mrs. Tom Smith)
▶ Set policies and standards, for example:
  ▶ Are you creating one record for each spouse and linking to household
  ▶ Are you addressing people Dr. Holden and Mr. Williams or Mr. & Mrs. Tom Adams
  ▶ Are your recording summer addresses
  ▶ Will you record a pledge to give $100 monthly to the annual fund as a pledge?
▶ Limit the years of data that migrates to new system

"Bad data in, bad data out"

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SUMMARY

▶ The desired data model / process model comes before purchasing the software to manage data

▶ There are multiple users of the data that need to be considered and involved in planning

▶ Buy a system that is affordable: training, equipment, staffing

▶ Not all CRM's or Donor Management Systems will meet your needs

▶ Stay donor-centric and cater cultivation, communication, and fundraising strategies to specific donors

▶ Automate functions like gift acknowledgement