

Canine Companions for Independence Expects Growth with Help from ClearView CRM

Think training your puppy to do his business outside is tough? How about training him to open the door for you? Cuddle patiently with a sick child? Alert you when a smoke alarm is beeping?

Canine Companions for Independence knows what it takes to train dogs to carry out such feats. The nearly 40-year-old organization provides trained assistance dogs free of charge for children and adults with disabilities. Canine Companions is the largest assistance-dog organization in the world, breeding, raising, training and placing dogs throughout the United States. These special animals help disabled adults by performing daily tasks, alerting the deaf and hard of hearing to important sounds and other vital duties.

As you would imagine, the training is time consuming, rigorous—and expensive. Sixteen months with puppy raisers and trainers pass before dogs are ready to join their owners. Canine Companions has placed more than 250 dogs but is determined to double that number. Naturally, such an ambitious program goal calls for an ambitious fundraising agenda. According to Stephanie McCracken, Canine Companions' national donor database supervisor, the organization wants to nearly double its multi-million dollar budget to support its goal. One of the keys to that effort is Canine Companions' donor-management system: ClearView CRM.



“ClearView CRM helps us strategically develop our growth plan.”

Powerful support

Canine Companions has used ClearView CRM for more than a decade to help manage some 40,000 gifts a year and nearly a quarter of a million donors in the system. The organization began with ClearView CRM's core donor database and operational tools (formerly known as PledgeMaker). As the organization's programs and development efforts grew, the system became more powerful. Today, ClearView CRM also includes a donor-relationship management application. Canine Companions accesses ClearView CRM online after initially having it installed at its offices.

The system accomplishes a range of activities for the organization, including:

- Tracking all donors and financial activity associated with donations.
- Producing targeted mailing lists.
- Processing all gifts and producing acknowledgement letters.
- Processing gift batches for the organization's four national data entry staff.
- Handling event management and volunteer tracking.
- Helping the planned giving director manage estate and trust accounts.

ClearView CRM even tracks the dogs' careers so the organization can let puppy raisers and trainers who “have an emotional investment” know how their work has paid off.



Planning for growth

McCracken says ClearView CRM “works for us. When I first started, we were a \$10 million dollar organization. ClearView CRM has enabled us to accommodate growth to \$16 million in revenues. It has not hiccuped.”

She mentions several specific contributions:

- Monthly giving has almost tripled because the system allows Canine Companions to accept credit-card payments online and upload them automatically to its database. “Now,” she explains, “we lockbox everything instead of manually entering the information. Without that ability, tracking growth is much harder.”
- With ClearView CRM, Canine Companions can set up appeal and accounting codes that make pulling information for management reports easy. For instance, data in the system’s core donor database now balances with the data in the organization’s accounting software. In the past, McCracken and the organization’s CFO had to work together to discover and fix any discrepancies in the two systems.
- ClearView CRM lets the organization more easily track dogs that have graduated, along with their trainers and puppy raisers. “The ability to track provides the program information the development staff needs to tell a more detailed story.”

As part of the effort to grow giving, Canine Companions’ executive director and director of advancement are beginning to use ClearView CRM as a major-gift tracking tool. Says McCracken, “That’s a major focus. We want to see what’s in the pipeline at various stages of cultivation.” The organization’s regional development staff also have decided to convert their disparate systems to ClearView CRM because they find the system easy to use. McCracken is customizing data governance in ClearView CRM so that management will see data they need to, regional directors will see what they need to, and so on for other users.

Indeed, to take full advantage of ClearView CRM, the organization is revamping nearly all its processes relating to how it uses the system. Arguably the most important aspect of the retooling is making sure data the organization has about all its constituents is consistent and correct. Two major means

to that end are standardizing the format of donor records and centralizing data entry. Data consistency is ultra-important to the organization, especially in tracking and opportunities management.

In addition, McCracken says, “Mailing lists live and die by how we set records up. We’re very careful when we pull lists so that, for example, people who just made a gift won’t get solicited again before it’s appropriate.” She emphasizes ClearView CRM’s ability to process gifts as well as handle donor relationship management is the key to success. The two capabilities “have to work together.”



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Complexity made simple

ClearView CRM’s core donor database, which is built on Oracle, underpins the system’s performance and flexibility. Canine Companions exploits the ability to get “different features interplaying to get desired results.” For instance, she pulls the mailing list for the organization’s newsletter list from its fundraising offices in Los Angeles and Colorado. The list includes people who received dogs, board members, puppy raisers, volunteers, people who have made planned gifts and various organizations. “That’s the first query,” she explains. The script also has five sub-queries to suppress mailings to people who don’t want them, add any donor over a certain gift level, add United Way donors and more.

Before ClearView CRM, McCracken tried unsuccessfully to build the kind of complex list segmentation she wanted for her organization.

ClearView CRM software developers built the scripts for her. "The way that information has to interplay is very complicated," she says. "Now, we can get all that different information, merging and de-duping without pulling multiple lists."

She cites other benefits, too. Having its systems and development effort in place with a database helps the organization better track its fundraising results so it can gauge how it might fine-tune what it's doing. The system's gift processing tools also is a boon for auditing.

And, though they might not realize it, Canine Companions' donors benefit from ClearView CRM. Over the years, it seems, data consistency and accuracy has led to a steady decrease in the number of calls from people with complaints resulting from out-of-date information. "We got much tighter on making sure that addresses are updated as quickly as possible," McCracken explains.

"I've been working with this system for 14 years. I know it's powerful and has remained consistent. It doesn't crash, we've never lost data, and we've never been hacked since we've gone online."

Client Services add to experience

Canine Companions for Independence might be considered a "power user" of ClearView CRM. That could be one of the reasons that the organization is such a fan of SofTrek's Client Services team.

"SofTrek customized ClearView CRM for us, which is a lengthy and complex effort. Client Services and the developers have been great in understanding this," says Stephanie McCracken, national donor database supervisor. "The service from our rep, Arlene, is top-notch. She gets back to me immediately, and issues are cleaned up quickly."

Robert Bunger, Canine Companions' national director of development services, seconds the sentiment: "Many companies talk about customer service and how it's important. SofTrek and its staff take it to heart," he says. "From someone actually answering the phone to being there for clients promptly and working with us, they all are great examples of delivering professional customer service."



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