Human services agency uses ClearView CRM to link multichannel fundraising efforts

To some, it's known as multichannel fundraising; to others, integrated or cross-channel marketing. To a large human services agency, it's simply one of the organization's most effective ways of achieving its long-time mission to help people affected by poverty, disasters and other issues.

Over the years, as the agency's programs grew, so did its fundraising efforts. Today, it adeptly manages a range of fundraising programs--annual campaign, events, online giving, social media efforts and more--that evolved as its donor base and number of gifts grew exponentially.

Data paints a picture

The organization's highly developed mix of fundraising approaches means that it deals with voluminous amounts of information and data daily. Donors give to the organization in many ways—mailing checks, using a donor portal, setting up a recurring pledge via a bank account, and calling to place a gift on a credit card, among others. Taking care of donors and gifts in such numbers requires a systematic, efficient method of processing, tracking and reporting all of these interactions.

The responsibility for dealing with this information lies primarily with the agency's donor services staff. The staff includes people answering telephone inquiries, managing a database, handling segmentation, and entering and verifying data. In addition, the organization works with vendors that help with data entry and processing, phone calls and business intelligence reporting. Even with staff and vendors devoted to these activities, the organization's average numbers of donors and gifts make the effort seem daunting.

But consider this: When an emergency occurs, the numbers can go through the roof, sometimes tripling the same number of calls in four or five days that came in during the previous year. Naturally, accounting for all that data with efficiency, accuracy and completeness is a complicated--and vital-- undertaking.

The importance of handling the information goes well beyond accurate record keeping, however, into the realm of deepening donor relationships. The agency strives to get a complete picture of donors and its relationship with them.

Making the job easier

The picture wasn't always as complete. At one time, the agency had a donation system, a customer relationship management system and multiple other databases where data lived. It tried to bring all of the information into one system, but efforts were for nought; the agency never had a true picture of each donor. For instance, one previous system allowed for the insertion of names, addresses and interest codes but wouldn't store credit card, bank or EFT information. The agency tried to manage information related to credit card donations by inputting the data into a separate spreadsheet. If a donor called and wanted to change his/her information, staff had to change the information in the system and then in a separate spreadsheet.

About 10 years ago, the agency decided to implement the ClearView CRM system (formerly PledgeMaker) from SofTrek.   *(continued)*

It chose ClearView CRM for its ease of use. The way the agency uses ClearView has changed over time, especially with the growth of online marketing and giving for many nonprofits. Today, it relies on ClearView in multiple key areas:

Targeting donors and prospects

The agency segments donor lists for its fundraising campaigns, primarily annual giving, with ClearView CRM, which builds lists using codes based on various factors. The goal, naturally, is to make sure current and potential donors receive relevant and appropriate messages. For instance, mail to monthly donors will feature different messages than mail to donors who might give to a disaster relief effort. The power of the system is that it allows the agency to look at and segment based on numerous aspects of any given donor's profile. The agency appreciates ClearView CRM's flexible segmentation and the ability to store past segmentation and reuse it instead of creating it again from scratch.

Direct marketing

Each month (barring any disasters that balloon the number of gifts), the agency sends hundreds of thousands of mailings to donors plus additional mailings to prospective donors. ClearView interacts directly with the agency's direct mail service, sending the segmented lists for mail campaigns for fulfillment. The agency tries to keep the system as clean as it can and focuses on eliminating duplicates.

Online giving

The agency uses ClearView CRM's online marketing application for its donor portal, which allows donors to give via its website. The organization also uses the application for all of its monthly giving online forms, allowing it to manage its monthly giving program in just one system.

Donation processing and thank-yous

The agency receives thousands of donations and pledges through a multitude of programs: annual giving, sustainer, campaigns, individual solicitations and more. Whether paid through credit card, EFT (electronic funds transfer) or check, ClearView automatically processes these donations—including monthly gifts—in real time, interacting with banks and the agency's credit-card processor. It encrypts and securely stores gift information in its "vault," including attaching credit-card data securely with each donor's file.

The agency also developed custom procedures in ClearView CRM that tell the system to assign codes to gifts, "triggering" the specific kind of personalized thank-you or acknowledgement each donor should receive. The trigger might be for a major gift, a specific geography or a Spanish-speaking donor. The entire set of triggers that tell ClearView CRM to assign acknowledgement codes is sophisticated and was built with SofTrek's help.

Development activities

The agency's development office, including major gift officers and development associates, uses ClearView to take advantage of the wealth of information the system provides. Some of the organization's MGOs access ClearViews CRM's capabilities on their laptops and tablets. They can easily work on projects or find information anytime, from anywhere, especially while traveling.