



Guide to Getting the Most Out of Your CRM

Agenda

1. The WHO/WHY of Your CRM Decision
2. 4 Steps to a Successful CRM Evaluation & Implementation
3. Donor Management 1.0 - Non-Negotiable Features
4. Donor Management 2.0 - A Modern Nonprofit CRM
5. Beyond CRM - Features to Multiply Giving

WHY Your CRM Decision is Critical

1. Modern nonprofits are telling their story in a world saturated with data and competing choices
2. In order to succeed, nonprofits need to build tell their story and personal relationships with more than just their top 100 donors
3. A good communication platform can be the difference between dying and flourishing

WHO Should Choose Your CRM

- **NOT** a Finance decision!
- **NOT** an IT decision!
- The owner of your CRM decision should be in marketing or advancement
- The staff members who own the fundraising goals should choose the tools to achieve the goals. **ROI-based decision!**
- Everyone should have access to CRM data... but the decision SHOULD NOT be everyone's to make

4 Steps to Successful CRM Implementation

STEP 1

Write down your fundraising and marketing goals (new givers, engagement, constituent advocacy/education, retention, etc)

STEP 2

Evaluate CRMs based on their ability to help you accomplish your specific goals. Decision should be based on ROI!

4 Steps to Successful Implementation

STEP 3

Set a hard “go live” date when you’d like to start getting traction toward your goals

STEP 4

Map out key steps/dates needed to starting seeing value. Your CRM decision and launch plan should be locked into those dates

The Basics

Core Fundraising Features

The Basics

Donor Management 1.0

Search for...

1

GIFTS

PASS-THROUGH GIFTS

PLANNED GIFTS

DATE	AMOUNT	MARKETING	PROJECTS	NOTES	RECEIPT
7/26/2017	\$15.00	Clean Streets USA 2017 Yearly Event CL0717EV			8/14/2017 Resend
7/12/2017	\$500.00	December Open House Campaign 2015 Direct Appeal Default	Guatemala Mission (2 Total)	Gift from in person meeting on 7/12	8/2/2017 Resend
5/16/2017	\$50.00	Healthy Kids USA 2017 Home Page Takeover Default	Healthy Kids USA 2017	Matching Gift from Employer	5/30/2017 Resend
5/15/2017	\$160.00	Q1 Open House Fundraiser 2017 Direct Appeal Default	Guatemala Mission (2 Total)	Retail/E-Commerce Transaction	6/7/2017 Resend
4/27/2017	\$250.00				4/27/2017 Resend
4/8/2017	\$225.00	Q2 Open House Initiative 2017 Radio Spot Default			5/30/2017 Resend
12/21/2016	\$200.00	Winter Youth Outreach USA 2017 Facebook Sponsored Ad Demographic 2	Winter Youth Outreach USA 2017		Send Receipt

PLEDGES & RECURRING GIFTS

\$100.00

Monthly

Past Due

Pledge Date: 4/13/2017 | Project: [Guatemala Mis](#)

\$50.00

Monthly

Cancelled

Pledge Date: 6/1/2017

GIFT ASKS

\$2,000.00

Recurring Ask

Project: [Scholarship 2017](#)

\$2,000.00

Fixed Ask

Gift Ask Date: 5/15/2017 | Project: [Scholarship 2017](#)

\$500.00

Fixed Ask

Gift Ask Date: 10/2/2015 | Project: [Joshua Bowm](#)

Help

CONTACT MANAGEMENT

- Householding, seasonal addresses, bdays, NCOA,etc
- Relate givers to one another
- Create custom fields to customize CRM
- Tag donors by their passions or preferences
- Donor rep account owners

GIFT MANAGEMENT

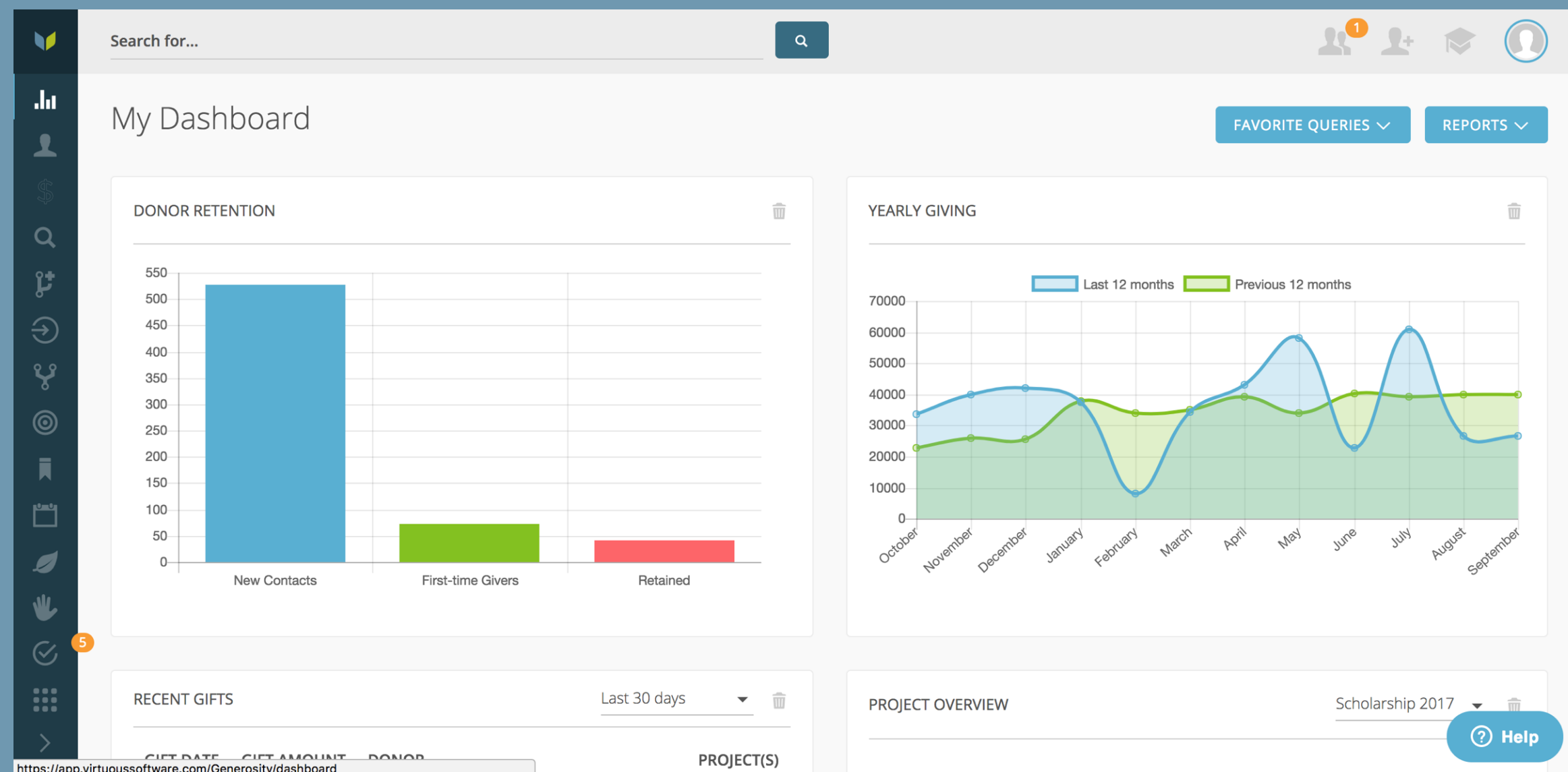
- Fund/project giving, soft credits & premiums, gift attribution (campaign/source), batch/receipt data, etc
- Recurring gifts & pledges
- Track planned giving including wills & bequests
- “Gift Asks” or solicitations

NOTES, TASKS & COMMUNICATION LOGGING

- Donor notes along with attachments
- Direct marketing and communication history
- One-time or recurring tasks and ability to assign tasks
- Monitor tasks/activity for staff

The Basics

Donor Management 1.0



BATCH DATA ENTRY AND DATA MANAGEMENT

- Fast Gift batching and reconciliation
- Duplicate and merge tools
- Role-based permission within the organization

ADVANCED SEARCH, RECEIPTING & SEGMENTATION

- Easily search details and summarized data
- Save searches/reports or export data to CSV
- Build and run marketing segmentations
- Receipts based on custom search or

CANNED REPORTS AND DASHBOARDS

- Canned reports including items like Giving by Segment, Campaign, Type, Rep/Solicitor, Batch, Fund
- Best practice reports on file health, major donors, etc

NICE TO HAVES

- Grant tracking and management
- Volunteer tracking
- Event management

WELCOME TO 2017

Modern Nonprofit CRM

Modern CRM

Donor Management 2.0



ALL-IN-ONE CONNECTIVITY

- Integrated Online Giving
- Open API and web integration
- Connectors to Cloud Software (email, accounting, etc)
- Social media integration

INTEGRATED EMAIL

- Full Email Marketing Features
- Integrated with Gmail, Outlook, etc
- Open and click Tracking
- List/Group Syncing

MOBILE ENABLED

- Mobile apps for fundraisers
- Push notifications to prompt real-time

Today's Donor Expect a Personal Connection

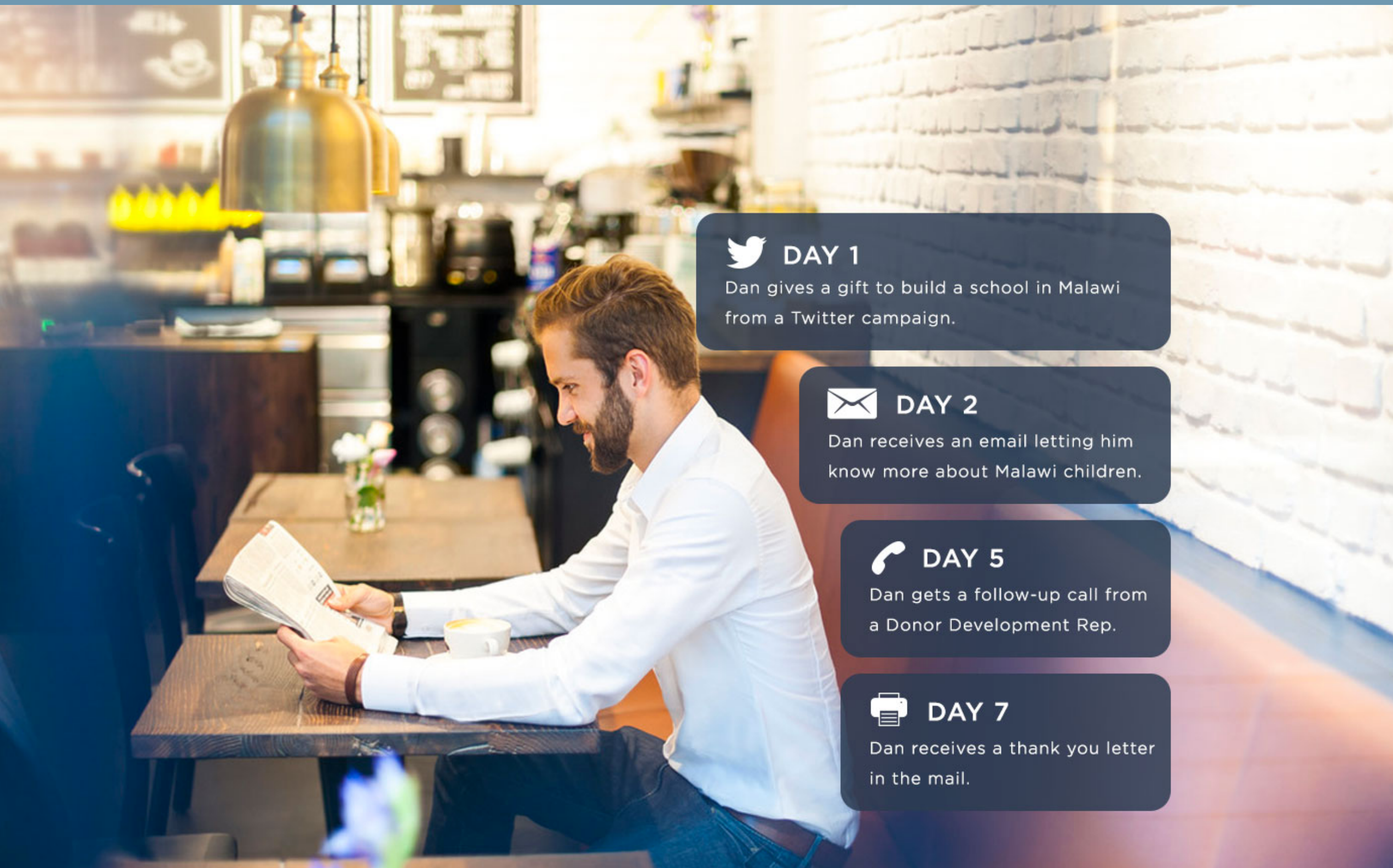
Based on Passions, Friends & Shared Experiences

BEYOND CRM

Multiply Giving through Personalization

Multiplying Generosity

Personal Connections with Marketing Automation

**DAY 1**

Dan gives a gift to build a school in Malawi from a Twitter campaign.

**DAY 2**

Dan receives an email letting him know more about Malawi children.

**DAY 5**

Dan gets a follow-up call from a Donor Development Rep.

**DAY 7**

Dan receives a thank you letter in the mail.

Marketing automation allows nonprofits can **automate and measure marketing activities** and workflows. Activities include emails, calls, thank yous, mail etc.

Your constituents get the right call or email... at the right time... based on their individual preferences or behavior.

A greater level of personal touch means dramatically increased generosity.

The end result is increased personalization, operational efficiency and revenue growth.

Multiplying Generosity

Personal Connections with Marketing Automation

- Clicks/opens tracked at donor level
- Behavior driven actions (gifts, form fills, etc)
- Multi-channel (email, phone, call, etc)
- Automate data updates
- Integrated email builder with merge fields
- Email versioning and testing
- Donor Journey mapping (Moves Mgmt)
- Workflow branching



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AUTOMATION WORKFLOW

EMAIL ENGAGEMENT

REPORTS

RESULTS

Donor Lifecycle

[Dashboard](#) / [Marketing Automation](#) / Donor Lifecycle

NONDONORS

Query: [DLC - Nondonors](#)

DONORS 93

ACTIONS 12

- Add Tag: Nondonor
- Send 'Donor Lifecycle - Nondonor #1' email
- Delay 3 days
- Task: Welcome Call
- Delay 3 days
- Send 'Donor Lifecycle - Nondonor #2' email

FIRST-TIME DONOR

Query: [DLC - First-time Donor](#)

DONORS 55

ACTIONS 6

- Remove Tag: Nondonor
- Add Tag: First-time Donor
- Task: Handwritten Thank You Card
- Send 'Donor Lifecycle - First-time Donor #1' email
- Delay 5 days
- Send 'Donor Lifecycle - First-time Donor #2' email

SUSTAINING DONOR

Query: [DLC - Sustaining Donor](#)

DONORS 88

ACTIONS 3

- Remove Tag: Nondonor
- Remove Tag: First-time Donor
- Add Tag: Sustaining Donor



CONTENT



STRUCTURE



BODY

No content here. Drag new from

Any device. anywhere. fast.

Arial



28px



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Merge tags

Welcome to the Human Fund!



CONTENT PROPERTIES



Text color



#ffffff

Link color



#0000FF

Line height



SPACING

Padding

More options



Top

-

30

+

Right

-

0

+

Bottom

-

30

+

Left

-

0

+



Multiplying Generosity

Lead Scoring and Predictive Analytics

Lead scoring allows nonprofits to rank donors and prospects based their relational or financial value to the organization.

Good nonprofit lead scoring leverages

- Giving behavior
- Wealth data
- Relational/family data
- Social media data
- Website/email activity

The lead score is used to determine how and when to engage with each individual.

We have seen orgs increase campaign results by 400% by using lead scoring



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VIRTUOUS RELATIONSHIP-BUILDING RECOMMENDATIONS

BEST CALLS TO MAKE TODAY

DONOR INFORMATION	VIRTUOUS SCORES		GIVING OVERVIEW	RECENT ACTIVITY	ASK
Andrea and Fred Price FINANCIAL 55 McCormick Pass Tuscaloosa, AL 35487 fprice19@fastcompany.com (Andrea's home)	FINANCIAL	SOCIAL	\$19,500 from 18 gifts LIFE-TO-DATE GIVING \$500 on 9/7/2017 MOST RECENT GIFT	22 days ago LAST NOTE	\$800 single gift
Mr James Murray SOCIAL 27437 Marquette Crossing Miami, FL 33124 jmurray3e@gmpg.org (James' home)	FINANCIAL	SOCIAL	\$3,600 from 6 gifts LIFE-TO-DATE GIVING \$400 on 7/28/2017 MOST RECENT GIFT	22 days ago LAST NOTE	\$700 single gift
Philip and Sandra Riley LAPSED 67 Manley Alley Honolulu, HI 96835 priley1d@sourceforge.net (Philip's home)	FINANCIAL	SOCIAL	\$1,575 from 7 gifts LIFE-TO-DATE GIVING \$225 on 11/24/2016 MOST RECENT GIFT	27 days ago LAST NOTE	\$40 extend recurring
Christiansen-Koepp Organization FINANCIAL 77488 Moland Circle	FINANCIAL	SOCIAL	\$19,500 from 10 gifts LIFE-TO-DATE GIVING	27 days ago LAST NOTE	\$2,500 single gift

Multiplying Generosity

Social Scraping and Geo-Location Analytics

ALL-IN-ONE CONNECTIVITY

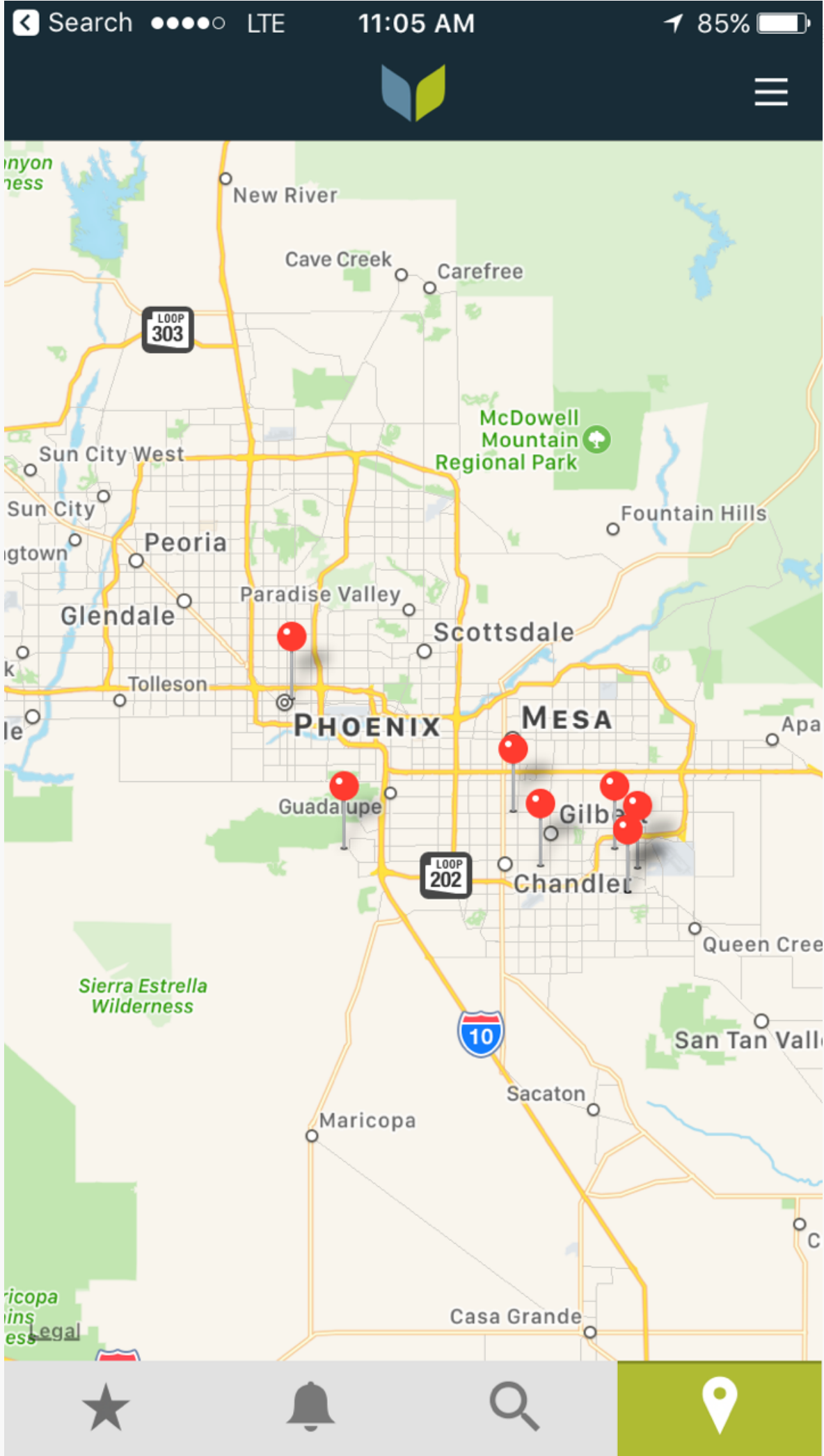
- Integrated Online Giving
- Open API
- Connectors to Cloud Software (email, accounting, etc)
- Full social media integration

INTEGRATED EMAIL

- Full Email Marketing Features
- Integrated with Gmail, Outlook, etc
- Open and Click Tracking
- List/Group Syncing

MOBILE ENABLED

- Mobile Apps for Fundraisers
- Push notifications to prompt the right action at the right time



GIVERS NEAR JOSHUA AND CHERYL BENNETT 8 OUT OF 8



[Arizona Public Service](#)
400 N 5th St
Phoenix, AZ 8500...



[Bruce Banner](#)
2318 E Chicago St
Chandler, AZ 85225



[Redemption Church](#)
1820 W Elliot Rd
Gilbert, AZ 85233...



Social Profiles

ANGELLIST
Username: [gabe-cooper](#)

FACEBOOK
[View Profile](#)

FOURSQUARE
[View Profile](#)

GOOGLEPLUS
[View Profile](#)

GRAVATAR
Username: [thedepartmentphx](#)

KLOUT
Username: [caspianhum](#)

LINKEDIN
Username: [gabecooper](#)

MYSPACE
Username: [armoryshow](#)

PINTEREST
Username: [caspianhum](#)

TWITTER
Username: [caspianhum](#)

Photos

GOOGLEPLUS

FACEBOOK

TWITTER

PINTEREST

Social Insights Results

PERSONAL INFORMATION

First Name: Gabe
Last Name: Cooper
Age Range: 36-46
Gender: Male

WEBSITES

<http://brushfireinteractive.com>

ORGANIZATIONS

Organization: Virtuous Software
Title: Founder & CEO

WEALTH DATA powered by DonorSearch

DS Rating: DS3
Target Ask Based on Giving: \$0
Target Ask Based on Wealth: K - \$5,000 - \$9,999

Multiplying Generosity

Impact Tracking and Reporting

Modern donors are distrustful of institutions and want a real connection to your cause.

Creating transparency and accountability with projects is the first step to improving engagement.

Impact Tracking tools can help you

- Set and track impact goals for each project (e.g. school desks purchased, kid scholarships, etc)
- Collect stories and videos and the project level
- Track donor communications to the fields (letters, encouragement, etc) and communications from field staff to donors
- Provide donor's with impact updates specific to their gifts
- Track project expenses, funding goals and ROI
- Assign project ownership and accountability





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PROJECT

SUBPROJECTS

MEDIA

IMPACT

GOALS

GIVERS

EXPENSES

Kenya Mission

Type: Default
Inventory Status: Not Allocated



David Cady
davidc@virtuoussoftware.com
Created on 4/27/2017

PROGRESS

\$3,000/month

NEEDED MONTHLY

\$420/month (14% to g...

PLEDGED

\$3,700 raised this year

RAISED

GIVERS

7

GIVERS THIS YEAR

7

TOTAL GIVERS

EXPENSES

\$8,600

EXPENSES THIS YEAR

\$8,600

TOTAL EXPENSES

ADD A FILE

Drop a file here or click here to search for a file on your computer.

LINK TO A FILE

MEDIA



635965509059489972932270724_Robert-with-Kids-in-Kenya.jpg

Uploaded: 4/27/2017 7:59:03 AM

Uploaded by: David Cady



5259176-empty-playground-on-an-orphanage-costa-rica.jpg

Uploaded: 4/27/2017 7:58:29 AM

Uploaded by: David Cady



It's Time to Scale Generosity

The **Virtuous** Integrated Platform

Personalizing Donor Relationships **AND** Easy-to-Use for Today's Nonprofit

KNOW & INSPIRE



Personal info, social insights, wealth data, friends, location

CULTIVATE



Automate personalized communication to build trust

AMPLIFY



Maximize giving. turn your donors into fundraisers

Three Building Blocks in the Platform

MODERN DONOR
CRM & DATA
ANALYTICS

GENEROSITY
AUTOMATION &
EMAIL MARKETING

ONLINE
FUNDRAISING &
ENGAGEMENT