Database Discovery
&
Understanding Your Data

- **What is CRM?**

- **The Founding Principles**

- **The 360-degree View**

- **Analytics**

- **Activating your Data**

- **The Future of Data Management & Marketing**

- What is CRM – (Customer) Constituent Relationship Management?

- A system(s) to manage all of your organizations' interactions and relationships with its constituents.

- And we historically did record data beyond gifts/transactions, even if we did not <u>use</u> all of that data in reporting, analytics, or database marketing.

- Life was a little simpler from a direct response fundraising and data management perspective.

- But the ultimate goals were defined:
  - Manage your constituent information
  - Learn from the data
  - Enable an informed one-on-one conversation via marketing, communications, and fundraising.

Principal gifts and
planned gifts

Major Donors

Repeat donors

First time donors

Prospects
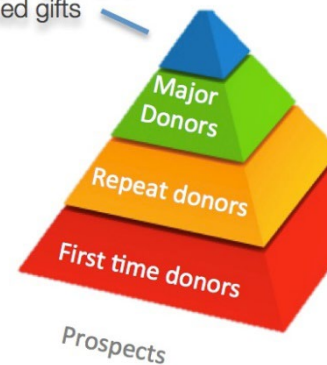
The 360-degree Constituent View

THE BASICS

- Biographical Information
- Contact Information
- Family Members
- Relationships

TRANSACTIONAL HISTORY

- Date (and even time)
- Tender Type
- Gift Amount
- Channel
- Source codes

INTERACTIONS

- Origination
- Involvement
- Channel & Source
- Inbound /Outbound
- Comments
- Responsiveness

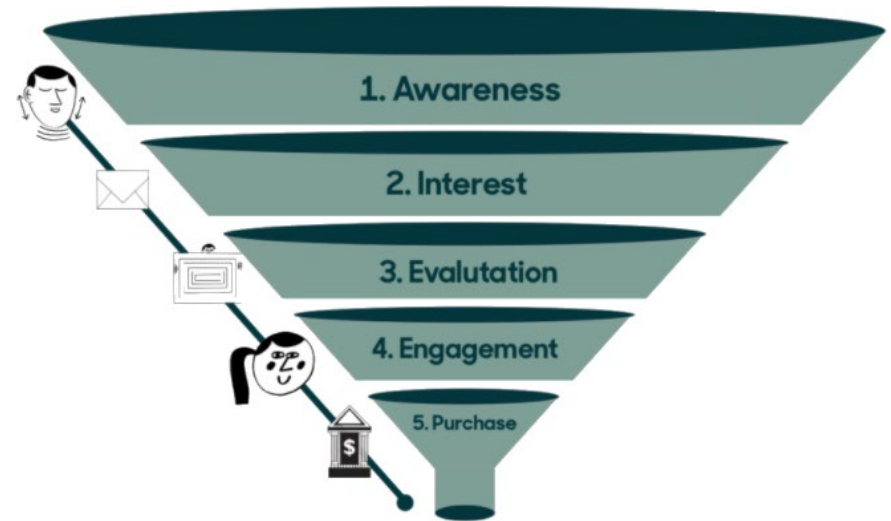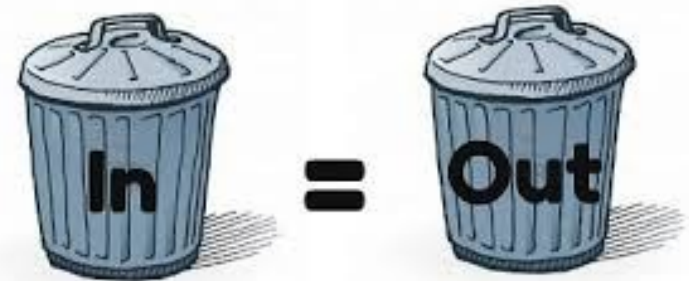**DEMOGRAPHICS**

- Age
- Gender/Gender Identity
- Interests/Skills
- Income & Wealth
- Research

PROCESSES, PEOPLE & TECHNOLOGY

- Established Business Rules
  - What data is important?
  - Constant review & adaptation
  - Data hygiene (NCOA, Email Appends)

- Roles and Responsibilities
  - Everyone is responsible
  - Universal adoption

- Constant Training
  - Not just for new employees

- Leadership
  - Constant reinforcement

In = Out

1. Awareness
2. Interest
3. Evaluation
4. Engagement
5. Purchase

Choosing your own Adventure

Fundraising / donor management

Anedot · arreva · B Gener⚬us · bloomerang · charidy
charityDYNAMICS · CharityEngine · Classy · CLICK&PLEDGE · DonorDrive
Double the Donation · donorperfect · evertrue · Flipcause · frontstream
Fundraise Up · funraise · Givebutter · GIVECAMPUS
give lively · givzey · gravyty · HANDBID
iDonate · mightycause · (#) NationBuilder · NEON ONE · onecause
Qgiv · rallyup.com · RaiseNow · SILENT PARTNER SOFTWARE · virtuous

Association / member management

asi ADVANCED SOLUTIONS INTERNATIONAL · Blue Sky eLEARN · daxko · cadmiumCD
FULLSTEAM · GlueUp · gravyty · GrowthZone
HIGHER LOGIC · hivebrite · memberplanet
MemberSuite · NAYLOR ASSOCIATION SOLUTIONS · Personify · tessitura

Consolidators

blackbaud · Bonterra · communitybrands · LUMAVERSE TECHNOLOGIES
Ministry Brands · salesforce.org · TOGETHER WORK

Grant management

AmpliFund · eCivis · FLUXX
FOUNDANT technologies · GivingData · GOOD GRANTS · GrantStation
smartsimple · Submittable · wizehive

ERP / back office

ACCUFUND · aplos · boardable
Foundation Source · multiview FINANCIAL SOFTWARE · Ren
Resilia · SPARKROCK

Data, analytics & infrastructure

boodleAI · BRIGHTHIVE · Candid · Cloud for Good
DONORSEARCH · EUROMONEY · iwave · omatic
true impact · Wiland DELIVERING THE FUTURE! · WINDFALL · wisely.

CSR / workplace giving

benevity · Bright Funds · CyberGrants
deed · Goodera · Givinga · groundswell
optimy · Ren · smartsimple

Case management / health & human services

binti · Bitfocus · casebook
eccovia · FAMCare5 RAPID CASE MANAGEMENT · Radicle Health
Therapy Brands · Social Solutions

Event / volunteer management

BETTER IMPACT · galaxy · Helper Helper · InitLive · RunSignup
SignUp · Vee · VolunteerHub · WEBCONNEX

Digital services / marketing

Feathr · Firespring · GoodUnited
MissionWired · M+R · PURSUANT · RKD GROUP

Payments / Tithing

easyTithe · eCatholic · ENGAGESMART · Givelify · Giving Block
Overflow · VERTICALS · Pushpay · Sphere · Tithe.ly

# Think about your engagement platforms as an ecosystem
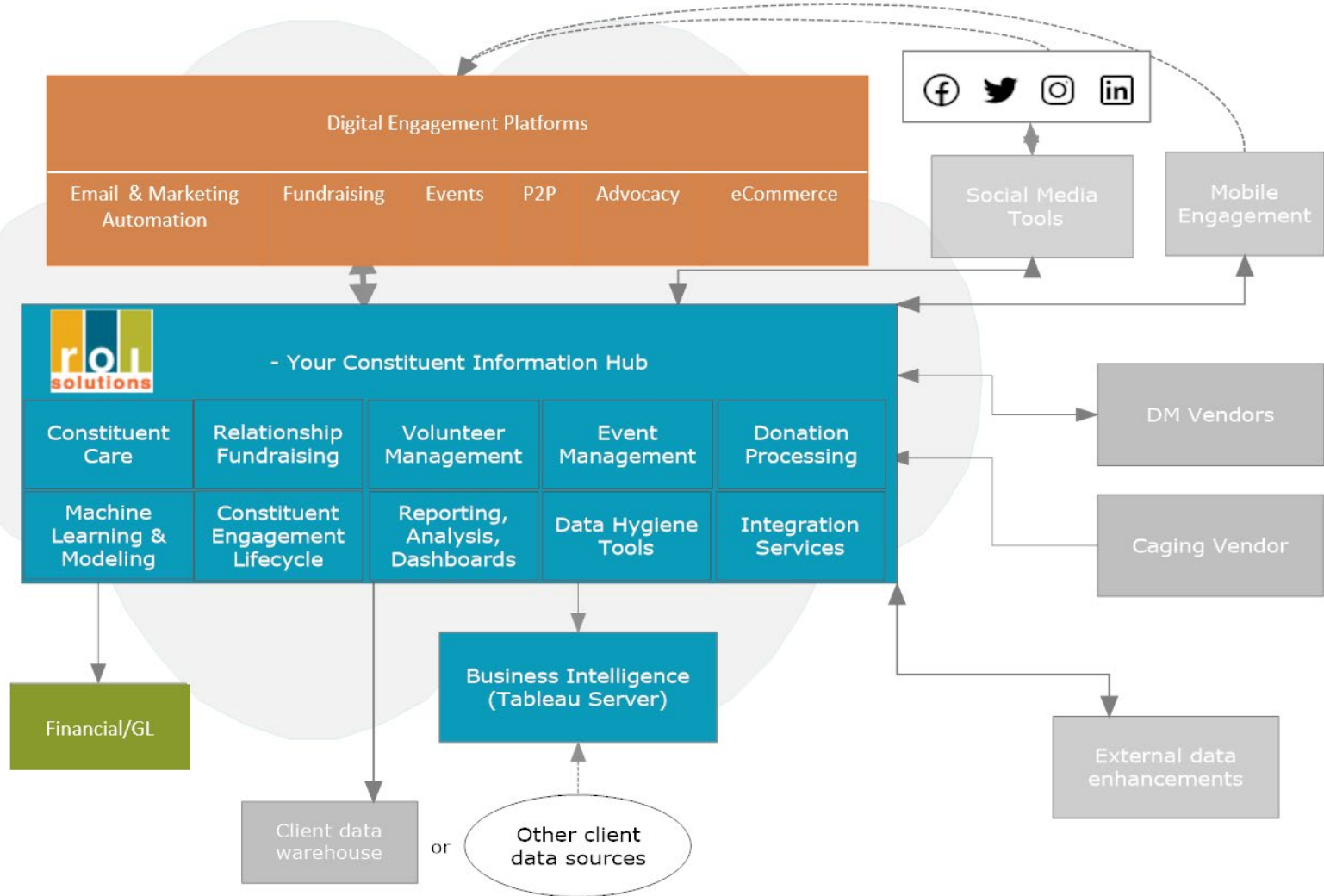
- Before bringing data in, before building a technical integration.

- Start with the business use case asking the question, "Why do I need this data, how often am I using this platform, and how will I use it?"

- Define the data that is essential, important, will inform other conversations in other channels, will be directional.

- Define your matching logic / identity resolution.

- Then build the integration.

The main goal of fundraising analytics is to understand and optimize the value of your constituents at every step of their journey with your organization.

To analyze your fundraising:

1. Identify metrics that are meaningful

2. Learn the interplay between those metrics

3. Learn how your donor file is balanced across key attributes

4. Set benchmarks for future performance

5. Manage your fundraising strategy to give your donors plentiful opportunities to contribute, in the ways that work best for them, as efficiently as possible
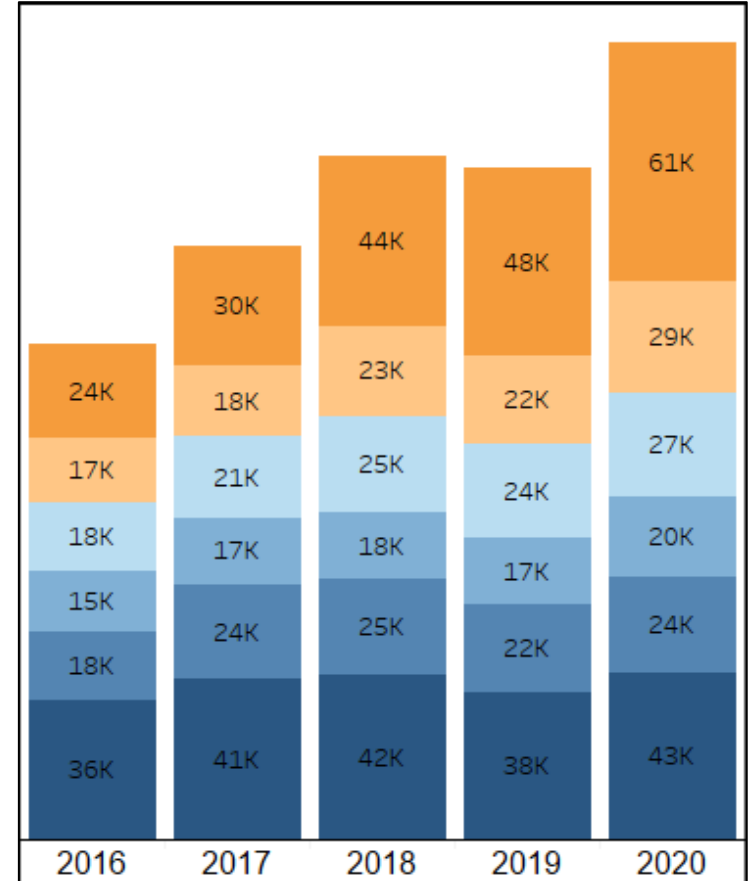
Jason's Top Ten Analytic(al) Things

- Start big and then dive into the details
    - Your analytic tools are important
    - BI Tools allow for live data exploration

- YOY Fluctuations in Retention Rates
    - First-Year Retention Rate
    - Multi-Year Retention Rate

- Metrics do not exist in vitro only
    - Real world events shape philanthropy
    - Interplay of metrics

- All metrics are important, but net metrics rule them all
    - Need to have costs – focus on roll-out

- Agree on what is long term donor value
    - Both revenue and costs

Lapsed Donors
New Donors
Reactivated Donors
Retained Donors

- Benchmarks (internal/external) are important
    - By mission, channel, premiums
    - If an organization does something great, ask them!

- Coverage Ratio
    - Fix your leaky bucket

- Recency, Frequency, Monetary Value (RFM) are good
    - What data makes your constituent unique?
    - Analyze on these unique attributes

- Metrics are not all about money
    - Call volume, volunteer recruitment, clicks, opens, shares, demographics

- Know your numbers! And let everyone know them, always!

ron solutions

DMAW
Direct Marketing Association of Washington

- Segments – new donors, loyal donors, sustainers, major donors, planned givers, volunteers

- Source Codes – RFM+(+++?)

- Constituent Journey Mapping

  - Constituent experience

  - People processes

  - Technology platforms

- Streamline and automate everything you can
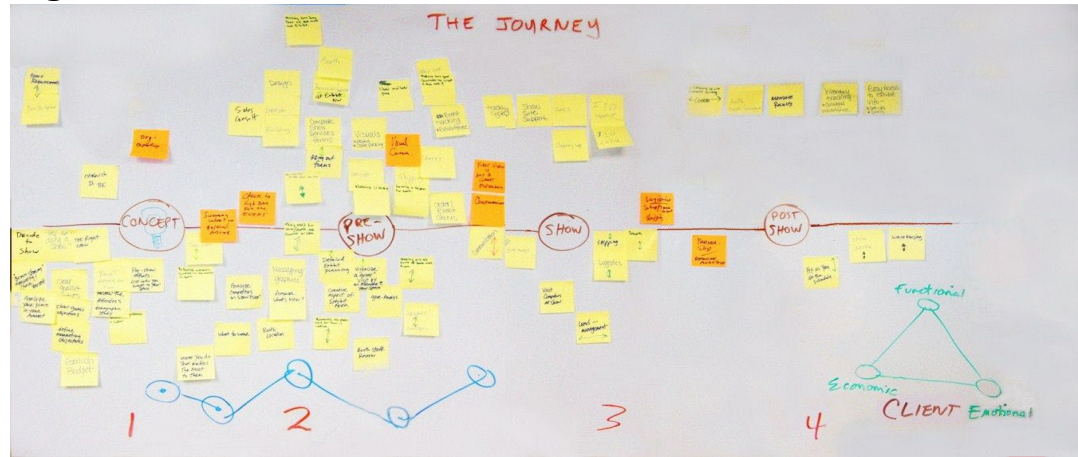
Try new things, test one new technology:

Marketing Automation

Machine Learning

What if…what does it mean…and when?

- Donor journeys will become increasingly granular. Eventually, there will be as many donor journeys as there are donors.

- Do source codes & Segmentation become obsolete?

- What if you got to your desk and the next/best, predicted meaningful action was waiting for you as a user?

- Where does true Artificial Intelligence first take hold in the constituent lifecycle?

- Will you have to know how to type?
  How will you interact with data?

roi solutions

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Direct Marketing Association of **Washington**
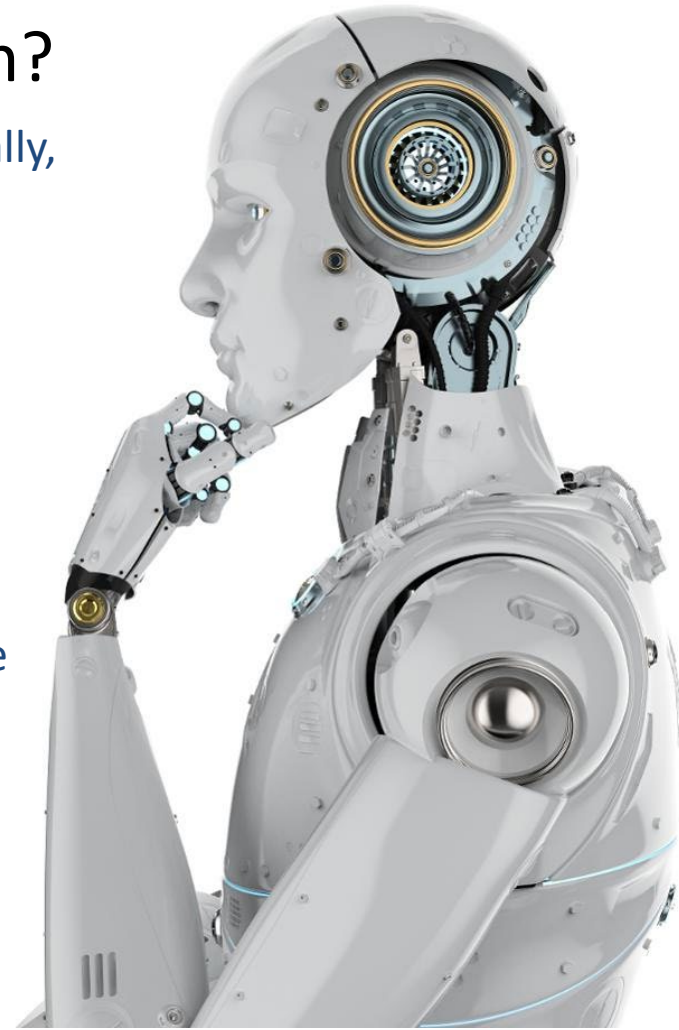
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