

Where Can Your Nonprofit Go with CRM?

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Kairos Strategies

- Consulting that helps nonprofits and socially-oriented companies with business and technology strategy



- Clients include: Goodwill, ACLU, Net Impact, Bay Area Immigrant Rights Coalition, SF School Volunteers, Care2, Breakthrough Collaborative, Groundspring

Creating the Constituent-Centric Organization

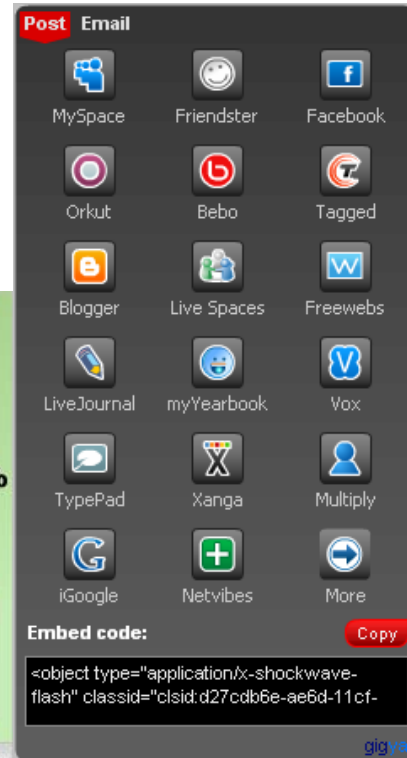
Constituent Relationship Management (CRM)

Agenda

- The constituent opportunity
- Creating a constituent-centric mindset
- Tips for implementing CRM
- Demonstration of Common Ground CRM

The Constituent Opportunity

Rich interaction channels to build relationships and deliver programs



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The Problem: Application Silos

Donor Mgmt
Raisers Edge
Donor Perfect
eTapestry
GiftWorks

Blast Email
VertResponse
Const Contact
Groundspring
JangoMail
PHPMailer

Events
Cvent
RegOnline
Acteva
eVite

CRM Platforms
Salesforce
CiviCRM
NetSuite
MS CRM
SugarCRM
Zoho CRM
Highrise

Other Tools
Case Mgmt
Assoc Mgmt
Social
Networking
Website
Survey Tool
Collaboration
Knowledge
Mgmt

The Risk: Drowning in Data

Data is scattered everywhere

- 51% manage over 4 repositories of data about the organization's various constituents!

Systems don't share data

- < 7% of respondents said that their systems share data easily with one another

Staff use poor tools

- > 50% of organizations use **slips of paper**, Excel spreadsheets, and personal contact managers (i.e. Outlook) to manage organizational data.

Source: 2006 dotOrganize survey of 400+ nonprofits

The Result: Mission Underperformance

- Fewer participants
 - Programs
 - Events
 - Education
- Fewer donations
- Fewer volunteers
- Wasted staff time
 - Manual data re-entry
 - Time compiling lists
- Underwhelming customer service

What is CRM?

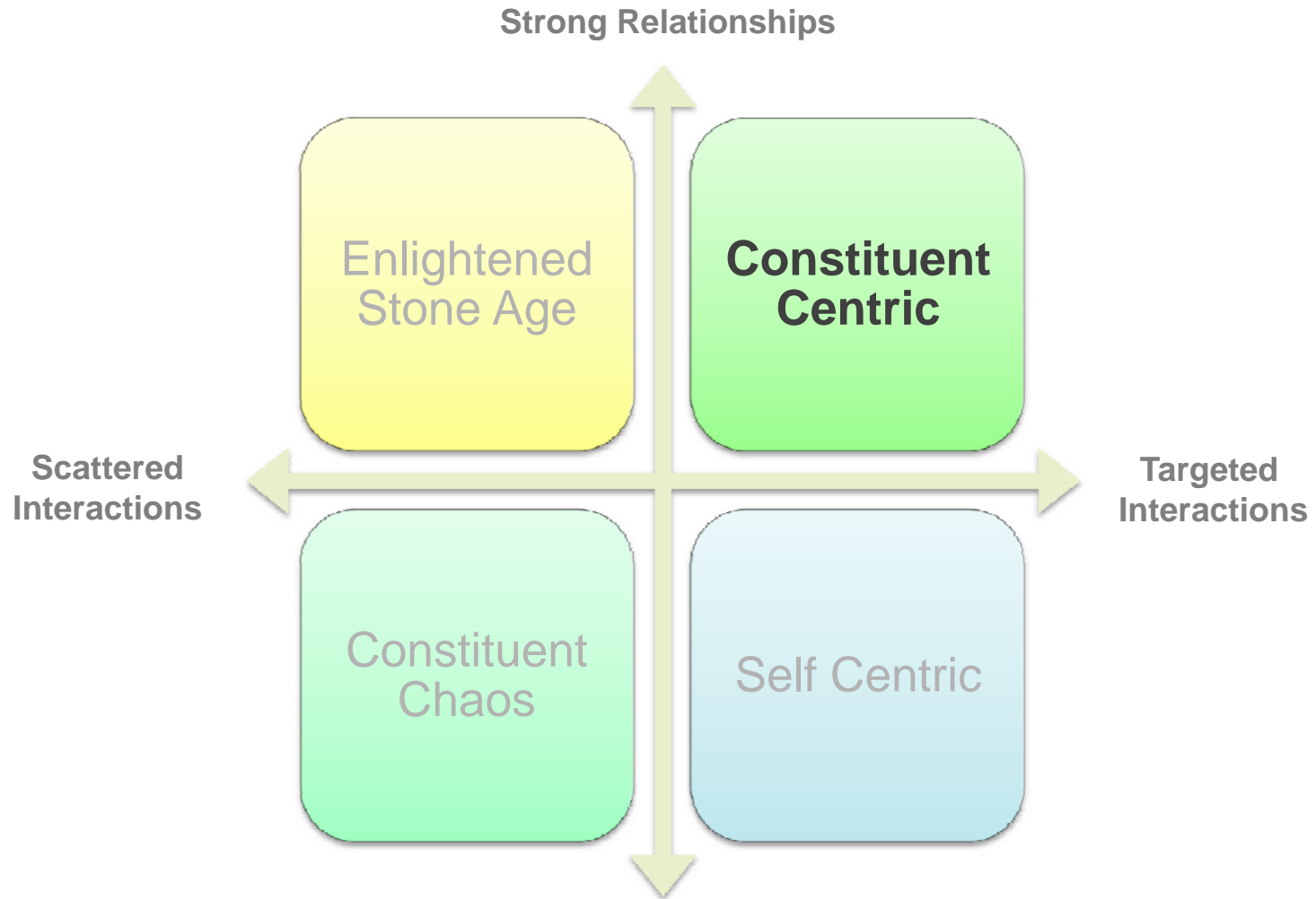
Constituent Relationship Management:
“**Institutional memory** about **interactions** with **all constituents** that is used to **build organizational value.**”



Whole Constituent View

- Donor
- Evangelist
- Member
- Volunteer
- Event Participant
- Program Participant
- Subscriber

What Kind Of Nonprofit Are You?



Path to CRM

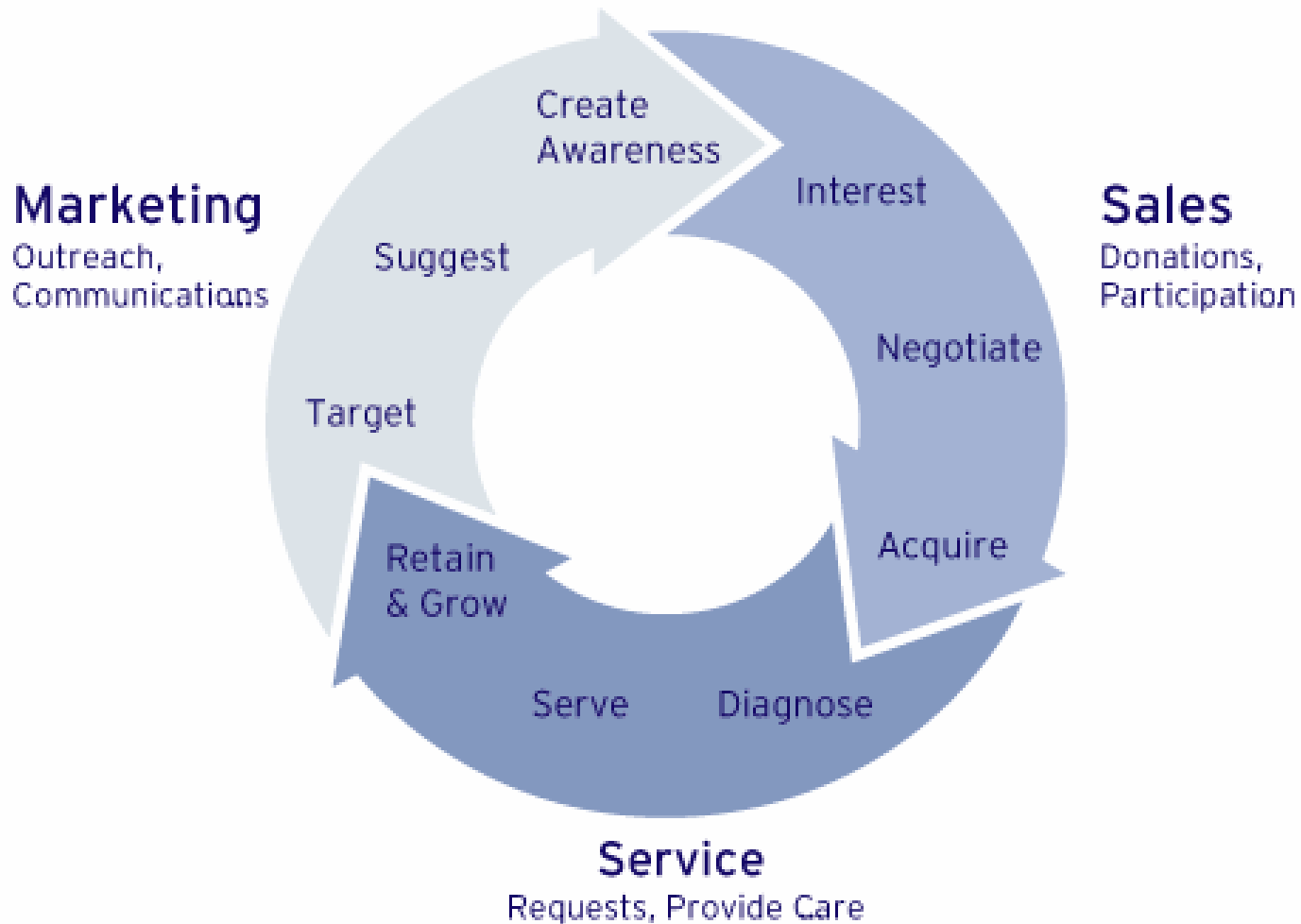
- CRM is strategy
 - Strategy to use data to build the value of relationships
 - What value do you get from constituents? What's your plan to grow value? How do you measure lifetime value?
- CRM is a technology
 - Every software application has its own database
 - How do you store data? Are you able to take action on data? Can you measure results?



CRM Strategy

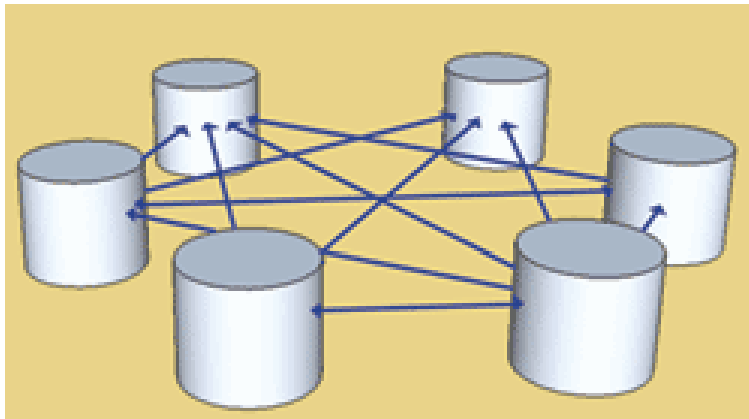
- Ensure every interaction adds value
- Develop and refine constituent “personas” to test assumptions
- Benchmark and track “lifetime value” of constituents
- Obsess about constituent experience across different groups; Experience as Brand (Jet Blue, Starbucks, Apple)

Understand Constituent Life Cycles

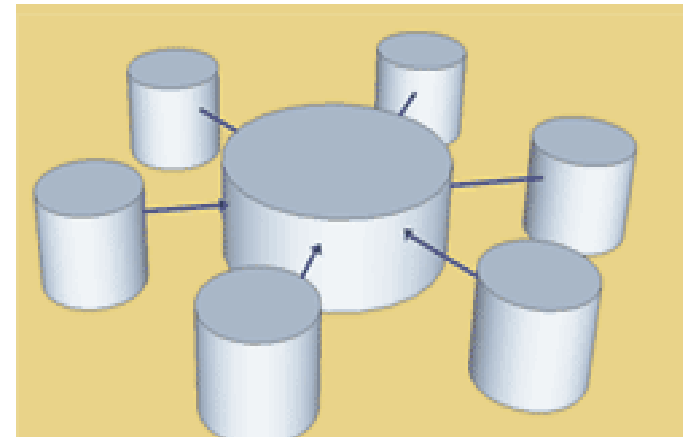


CRM Technology

Focus on **data strategy and metrics** rather than looking for technology silver bullet



Application to Application



Data Warehouse
Or
Vendor Ecosystem

CRM Technology

- Identify repositories of data across the organization
- Look for opportunities to “cannibalize” repositories
- Get out of Excel and Outlook – unless they integrate
- Never add new technology without a data strategy
- Purchase within vendor ecosystems

Ongoing: Track Metrics and Adjust

Marketing



Increase campaign response rate

Increase word-of-mouth

Decrease acquisition cost

Increase ROI on outreach efforts

Improve targeted prospecting

Accelerate maturation rate

Sales & fundraising



Increase "value" per constituent

Shorten major donor "sales" cycle

Increase average gift size

Increase average program use

Increase conversion rate

Increase avg # of gifts/yr

Service



Increase retention rate

Increase productivity/FTE

Reduce service costs

Decrease inquiry response times

Inc. constituent self-education

Inc. constituent satisfaction rate

Thanks!

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Common Ground CRM

Demonstration

Questions?

- Email us at commonground@convio.com
- Call 888-528-9501 ext. 1
- Visit us at www.convio.com/commonground where you can:
 - Register for a trial
 - Request a 1:1 demonstration
 - See a Common Ground video