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MOVE PEOPLE™

TOOLBOX FOR THE MODERN NONPROFIT

Donor Management Made Easy

IS YOUR DONOR DATABASE THE SOURCE OF MORE HEADACHES THAN CONTRIBUTIONS?

Missing data. Lost contacts. Unwieldy reports. Sound familiar? Managing your data and supporter relationships shouldn't be painful. If your database system has seen better days, it may be time to ease the pain and consider a flexible, easy-to-use system that fits your organization.

More and more nonprofits are turning to a new common-sense solution that manages much more than their data. This system allows organizations to better handle all their relationships — donor, prospect, volunteer and staff — as well as the activities and events that involve them. This new breed of database is patterned after a proven approach used in the for-profit arena called "customer relationship management," or CRM. In the nonprofit world, the acronym is the same but the "C" stands for "constituent," i.e. the individuals, corporations and foundations that are the focus of your fundraising efforts. Constituent Relationship Management is more of a philosophy than a technology: the goal is to interconnect current and prospective donors in a seamless system that maximizes the organization's outreach.

As a result, forward-thinking nonprofits are catching up to retailers like Amazon.com who have long relied on such cohesive approaches to build better customer relationships. Nonprofits now have access to the same time-tested tools and techniques that have made commercial giants successful. Fortunately for nonprofits, CRM is surprisingly economical and cost-effective, thanks to years of fine-tuning by industry leaders and evolving technical innovations.

Think of CRM as the next generation of donor management technology, except this kid is leaner, works harder for less, and needs very little handholding. Not to mention CRM plays well with others because it's open and easy to plug into pre-existing applications. Not only does this technology collect donor information, it "slices and dices" it in a way that's quick and easy to understand, access and share.

The difficult days of accessing data, creating custom reports and manually entering donor emails can be long gone with CRM. It's a solution that makes your life easier by offering a spectrum of user-friendly features such as:

- ***Donor management*** for all types of gifts;
- ***Volunteer management tools*** to organize multi-shift jobs and organize volunteer data;
- ***Event management features*** to track invitations and sponsorships, assign attendee levels and record payments and expenses;

- ***Custom reports***, for immediate access to meaningful metrics, automatically emailed to you or displayed in a graphical dashboard;
- ***Integration with Microsoft Outlook®, Lotus Notes® and Google Apps***, so you can keep your calendar, tasks and contacts in sync as well as capture any email sent to your constituents in real-time;
- ***Connection to your supporters*** via popular social media and networking sites like YouTube, Twitter and LinkedIn;
- ***Web access from any browser*** so you can work wherever there's Internet access—from home, on the road or in the office;
- ***Option of using your Blackberry or iPhone*** to pull information about a major donor or prospect in time for a meeting or event.

Also important, CRM systems embrace more than just donors in their databases. Today's CRM systems can encompass any and every person who comes into contact with your organization, whether they're donors, volunteers or other community advocates. Relationship management in this day and age depends on knowing all of your contacts and constituents and their relationships with others. This knowledge is key to effective fundraising.

WHAT IS A CONSTITUENT RELATIONSHIP MANAGEMENT (CRM) SOLUTION?

For starters, CRM is a better contact management system. You can use it to manage relationships with everyone involved in your organization. It connects seamlessly — or replaces completely — the other programs and applications you use on a daily basis, giving you a total view of your constituents.

CRM is also tailor-made to work with the technologies your constituents use to communicate: YouTube, Twitter, Facebook, LinkedIn and blogs, to name just a few. CRM solutions can connect you to your supporters with any or all of these technologies and help you learn more about them and their relationships.

HOW WILL IT HELP ME MANAGE MY RELATIONSHIPS?

Traditional donor management systems simply stored your information. Plus, these outdated systems were so technically difficult to use, very few staff could ever access and utilize the data. Relationship management today requires knowing all of your contacts and supporters (not just donors), understanding their relationships with others, and coordinating those relationships into action for your cause. CRM makes all of that possible.

Suppose your mission is to save abandoned animals through pet adoption. With CRM, you can record information about the adoptive family plus so much more: the pet's medical history, the date of the adoption, the condition of the animal, and any number of other important details.

How about having information available to multiple people within your organization at the touch of a button? CRM allows your executive director or development director to create tasks for others. It also enables your staff to capture meaningful constituent interactions in real time.

HOW WILL IT MAKE MY WORKDAY EASIER?

CRM allows you to easily bridge your program work with operations like fundraising and case management, so that you never again have to open a handful of different applications to see the entire picture. CRM solutions even allow you to track anything from adopted pets to teacher applications to eyeglasses flown to Rwanda.

Best of all, CRM helps you work more efficiently every day. How? By coordinating your daily tasks into a series of manageable steps for you and your staff, it keeps everything you need in one place, accessible via a single dashboard. This means fewer sticky notes, FYI emails and debriefing meetings, and more focus on getting things done for your mission.

Let's say a new donor gives more than $1,000. Your system can organize (and track) a series of steps that begins automatically as soon as the gift has been captured.

– You'll be notified instantly
– Your CRM can prompt you to send a different acknowledgement letter than your standard letter, and
– The CRM can flag a staff person to follow up with a phone call

THINK ALL OF THAT SOUNDS TOO GOOD TO BE TRUE? THINK AGAIN.

Here are five uncommonly cool ways CRM can help you create opportunities for your organization.

1. Seize the Day and Your Data

Tired of being ruled by your software? If you're like a growing number of nonprofits, the number of staff actually using your donor management system is small. Why is that? For a variety of reasons — system complexity, difficulty of use, fear of corrupting data, technical limitations, department focus — your organization has adapted to fit the software you're using, not the other way around.

We understand that your database is your livelihood, and because mistakes are costly in any system, it's understandable why you can only have one or two people using your donor management software at a time. The problem is, the environment you work in today requires you to be quick and flexible. You have a whole team of people in your organization who have knowledge about your constituents, or a need to access that knowledge. They all need to be able to use the system — not just one or two people in one department.

That's what prompted Susan G. Komen for the Cure® Austin Affiliate to adopt a CRM solution to replace their old systems. "It's so easy to use that we can train different levels of people, like our key volunteers and board of directors, to use it," Executive Director Ramona Magid said. "But the biggest benefit I see is connecting all the pieces. We've been spinning our wheels using different spreadsheets and databases, and the information was not easily accessible. Our CRM will change all that."

"The biggest benefit I see is connecting all the pieces."

Ramona Magid, Executive Director, Susan G. Komen for the Cure® Austin Affiliate

CRM allows for collaborative access, and because of the level of controls available, the fear is gone. You and others in your organization have easy access to the information you need, and you can control that access right down to who can run reports, who can edit records, and even what fields are visible to whom. This way, for example, everyone knows which records are marked as current or potential major donors, but only select staff can see exactly how much they've given, access their contact information and modify the details. Lock it down, open it up—it's as easy as "yes" or "no" in a checkbox.

2. Anytime, Anywhere Access

Modern CRM systems allow web access from any browser. You can work from anywhere there's Internet access — from home, on the road or in the office — and at any time. Your system is accessible to anyone you've granted access to, and their level of access is controlled by the parameters you set.

Here's a nice surprise: With the right web-based CRM, you can even use your Blackberry or iPhone to pull information about a major donor you're about to walk into a meeting with. (For example, what other relationship might they have with you besides "donor"? Are they also volunteering?) Or, access records while you're at a fundraising event, and update the record immediately with tasks for your team to provide follow-up. Wouldn't it be great if thank you notes or receipts were already in process back at the office while you were still at the event?

THE VIEW FROM HERE

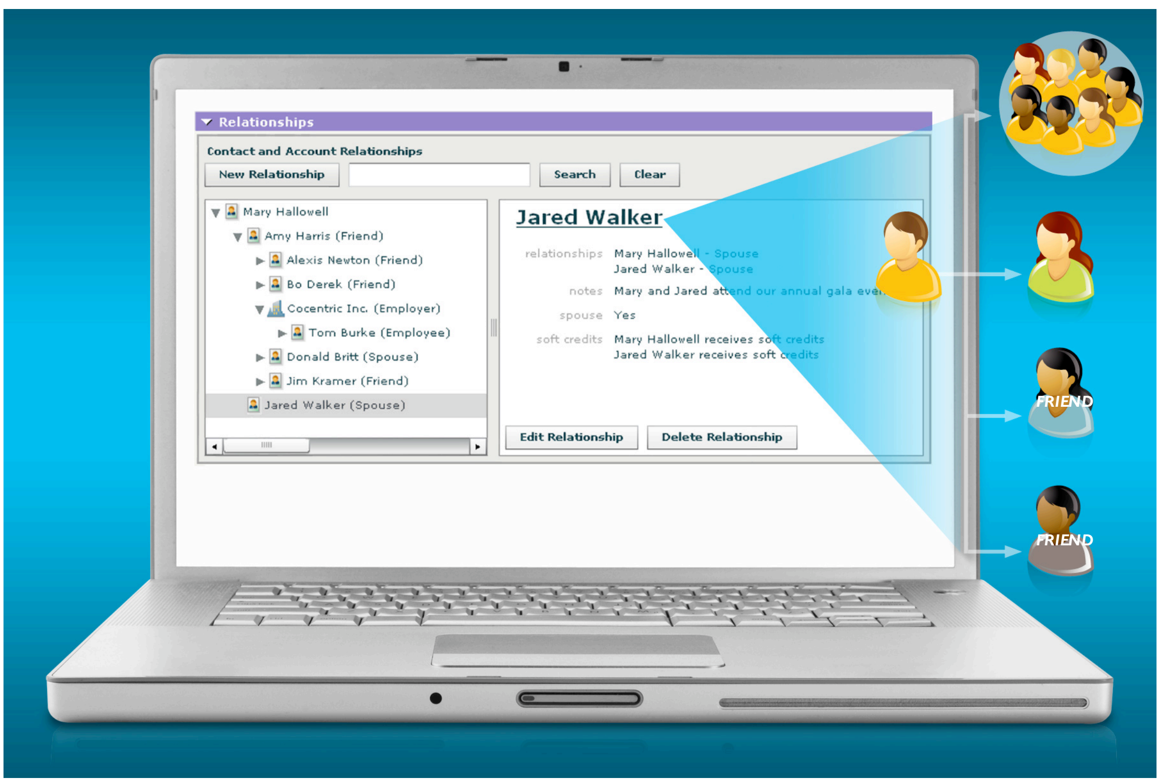
Access constituent records, view reports, or assign tasks from your mobile device or anywhere there's Internet access.

3. A Better View, A Bigger Impact

True relationship management is not just about managing your relationship with your donor; it's about coordinating your constituents' relationships with one another. CRM allows you to keep track of your constituents, their networks, and how all their actions toward your cause are interrelated.

Of course you want to be able to see household relationships, but what about employer to employee relationships, constituent to constituent, or board member to target major donor? Relationships are king, and with state-of-the-art databases you can see all of their many layers.

Suppose a local corporation has a group of 60 employees who regularly volunteer for your nonprofit. Your volunteer coordinator knows about them, but these individuals are not in your donor database because they haven't given money. You're not seeing the whole picture! If you had CRM you'd know that this company would be a great prospect for an employee campaign, a sponsorship, a Walk team, etc. With CRM, your volunteer management, campaign management and donor management systems would all be communicating for a coordinated proposal.



4. Fits The Way You Work

Imagine a system that your staff actually enjoys using because it makes everyone's job easier. CRM fits with your staff, your organization and the way you work. Don't settle for "one size fits some" when your CRM can be tailored to meet the needs of each department and integrate with other systems.

You can configure the CRM to follow your rules. For example: change the page layouts your staff see based on their role and modify fields to the language you use. Add new fields that are important to your unique organizational structure or remove fields that do not add value to how you work. Set rules that alert staff, send reports and change values in the database based on your process. The best part is, *you can do all this through clicks – not code.* And you can do it yourself: no more calling IT or the system vendor to do something that is standard in almost any off-the-shelf program.

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CRM also fits into your daily processes. For example, if you're like most organizations, you use Outlook for your business processes. Let your CRM automatically assign predefined tasks to others via Outlook. With a simple click, the owner of the task is back in the system to get the context of the request. With another click, you can add any outbound email communication from Outlook to the contact's record, so that you never lose track of who has been corresponding. Then automatically send your board members reports detailing your progress via email (no more sending one-off packages).

CRM will also keep your Outlook calendar synched automatically, so if you assign yourself a task (to-do) it will show up in your Outlook To-Do folder. When you complete the task, it updates the CRM. Because most business productivity tools like Outlook seamlessly communicate with the CRM solutions, all your data is captured for a full view of the relationship.

Now that you know that a CRM solution can fit into your way of working, why not have it collect or share information with other systems? If you are like most nonprofits, you run many programs to meet the mission of your organization. There is key data in all of these systems that would benefit the development and major donor teams. And the reverse is true as well. Modern CRM solutions are open and extensible. This means there are a variety of easy ways to move data in and out of the system. The result is a more complete view of your constituents, volunteers, and staff, and a coordinated approach to advance your mission.

5. Banish the Bottlenecks

Tired of waiting to get what you want? If you have to go through a series of systems just to answer a simple question, your precious time is being wasted while the clock keeps ticking. But imagine having the power to easily "ask and receive" of your technology whenever the moment strikes.

Everyone wants "their" report. Often the system you have in place does not have that view, and to get that view would either be costly (pay someone to add it) or at the bottom of the IT staff or volunteers' work queue. With CRM, you can create your own reports, modify existing ones, and choose whether or not to share them. Maybe you don't even need a report – what you are after could be displayed in a filtered view of your data.

WHERE CAN YOU GO WITH CRM?

Your organization's knowledge and relationships are its lifeblood. Your ability to strengthen the bonds of your relationships lies in your ability to know, understand, and interconnect those people at the end of the phone call, email, or website click. With CRM as a hub to keep you plugged in to each appropriate point of interaction both online and off, you won't risk starting the wrong conversation, wasting time deciding where to jump in, or missing out on the conversation altogether.

Ultimately, staying competitive and adaptable in an environment of limited donor dollars and shorter attention spans requires not only that your approach be well coordinated among the members of your organization, but also that it be flexible—that you are able to tell, in a timely manner, what's working and what's not, and be able to change your strategy accordingly. Only so much is humanly possible in a day.

You have a passion for your mission and your technology should too. Isn't it time to upgrade from a donor database to an open CRM that is easy to use, provides the information you need at your fingertips, really knows your supporters and ultimately supports your mission?

About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit **www.convio.com.**