

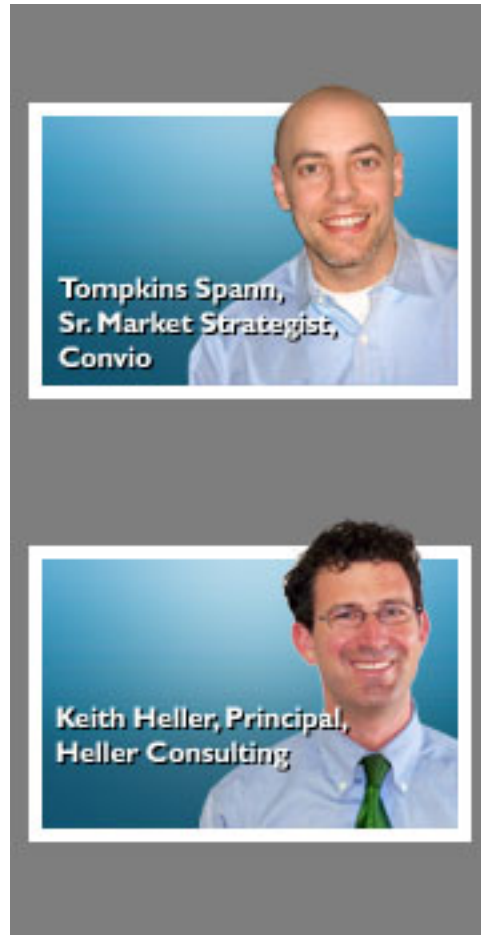


MOVE PEOPLE

Sync Up With Your Major Donors

Presented by: Keith Heller, Heller Consulting and Tompkins Spann, Convio

Welcome



Tompkins Spann,
Sr. Market Strategist,
Convio

Keith Heller, Principal,
Heller Consulting

Goals for Today's Webinar

- Introduce the benefits of CRM for nonprofits
- Define Moves Management fundamentals and advanced practices
- Demonstrate how Common Ground delivers the CRM technology for effective Moves Management operations
- Giveaway FREE software and services!

Moves Management

- Strategy for prospecting and soliciting major gifts
- Composed of stages, each with specific tasks
- Requires ongoing relationship development
- Ideal process for CRM to help coordinate



Introducing Heller Consulting

Introduction to Heller Consulting

- We help non-profits streamline fundraising operations and maximize their use of fundraising technology.
- Some Stats:
 - 12 Years, 600+ Clients, 1200+ projects
 - 3 Offices: San Francisco - Chicago – New York
 - 24 people
 - Too much fun (we love our work!)
- Our approach and expertise grows out of our real-world, hands-on experience working in non-profits.
- We've developed best practices to address the most common challenges our clients face (and plenty of unusual ones as well).

Clients Include...



Top Challenges my clients face.....

1. Software is too complex
2. Software doesn't do what they need
3. Can't get information they need
4. Information they do get is hard to interpret
5. Can't access the reports themselves
6. Getting information in is complex
7. Information that's there isn't trusted
8. Doesn't work how they work – in outlook, by remote
9. Doesn't support their strategies –actually have to modify (or curtail!) strategies based on software limitations
10. Too many systems



Malia
Major Gift Officer

Name	Donation Amt	Notes
Mark Magician	\$10,000	Meeting next week
Paul Pilot	\$5,000	Solicitation letter
Alicia Angel	\$200,000	Dinner with ED
Stuart Scholar	\$25,000	Event invite
Bubba Bigshot	\$1,000,000	Tour of facilities



Phone calls



Website



Volunteer



Email



Relationships



How CG Addresses Challenges I

Top Challenges

1. Software is too complex
2. Software doesn't do what they need
3. Can't get info they need
4. Info is hard to interpret
5. Can't access the reports

How CG addresses

Turn features on and off, even based on roles / people

Ease of customization

Robust, simple reporting tool

Great dashboards, drill down reporting for detail

Custom reports pages, they can be emailed (dashboards too!)

How CG Addresses Challenges II

Top Challenges

6. Getting information in is complex
7. Don't trust information
8. Doesn't work how they work
9. Doesn't support strategies
10. Too many systems

How CG resolves

- Workflow rules – clear, step-by-step, fool proof processes
- Validation – system won't let you make mistakes!
- Sync with outlook, SaaS, on your phone
- Sophisticated-not complicated, contemporary tools
- Built on Sf.com – anyone in org can use– even program staff!

CRM – What it Means for You

- 360 degree view of your prospects
 - Beyond Fundraising Info
 - Online Interactions (Emails, Advocacy, Website Actions)
 - Event Attendance, Volunteering
 - Mission Participation – Your Programs
- Who has the greatest affinity?
 - Segmenting for Greater Success

Mining Your CRM System

- Traditional Fundraising Tools
 - Top Donor Reports
 - LYBUNTS, SYBUNTS
 - Wealth Screening Data

- A Broader / Deeper Perspective
 - Who's active online?
 - Who participates in your mission?
 - Who's benefitting from your mission?

Fundamental Major Gift Practices

- Identify & segment prospects
- Simply track their interactions
- Work the way they work (email integration)
- Move people through the cultivation stages
- Report on pipeline & results
- Get started easily (no software, SaaS)

Advanced Major Gift Practices

- Conduct deep segmentation, even based on “prospect profiles” (calculated fields)
- Store substantive prospect research findings
- Get info on the go: remotely, mobile devices
- Measure more than results and pipeline
 - actual activity (# of touches)
 - time to move prospects between stages
 - “aging” of prospects
- Access dashboards for whole MG program

Introducing Common Ground

A Brief Demonstration

Please contact us for a personalized demonstration

commonground@convio.com

(888) 528-9501 x1

Donated Software & Services

- Send an email to: commonground@convio.com with the following:
 - Organization Name
 - Current Database Product(s)
 - Number of Staff Needing Access
 - Brief paragraph application for the donated software and services (why you?).

- Winner selected and notified this Friday 6/12

Thank You For Attending!

- For more information on **Common Ground**:
 - Web: www.convio.com/commonground
 - Call: (888) 528-9501 x1
 - Email: commonground@convio.com

- For more information on **Heller Consulting**:
 - Web: www.teamheller.com
 - Call: (510) 841-4222
 - Email: info@teamheller.com