The Donor Management Systems Toolkit:
Best Practices for Implementing and Using Your Database
July 2013

Logistics
Ask questions! Otherwise I'm speaking to a black hole!

Logistics
#7 to Un-mute  
#6 to Mute
Wait for the recording to start…

The Donor Management Systems Toolkit:
Best Practices for Implementing and Using Your Database
July 2013

Introductions

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What We'll Cover Today

- Use Your Fundraising Vision
- Choosing the Right System
- Making the Move
- Implementation, Configuration, and Migration
- Defining Usage and Integration
- Supporting the Technology Transition
- Database Best Practices
- What Should You Take Away from All This?

Use Your Fundraising Vision

There's a Lot to Think About

- How do I meet my fundraising goals?
- How should I think about my data?
- What system do I choose?
- What makes sense, given my limited time?
Use Your Vision

Keep your fundraising past, present, and future in mind when defining the process.

What Do You Need Now?

What kind of features are essential to get your fundraising done today?

Where Are You Going?

- Think three to five years down the road...
- Where do you hope to be?
- What do you need to be able to manage those processes?
Choosing The Right System

If You Want a System Like... Little Green Light or GiftWorks

Try these other lightweight, easy to use systems.
- Donor Snap
- Exceed Basic
- Donor Tools

If You Want a System Like... NeonCRM

For a tool that's strong in integrated online features, try:
- eTapestry
- NonProfitEasy
- The Databank
If You Want a System Like… DonorPerfect

For those with complex fundraising needs, also consider:
• The Raiser’s Edge
• DonorPro
• Talisma

If You Want a System On Top of… Salesforce

These tools are also built on the Salesforce.com platform:
• Affiniquest
• Causeview
• DonorNation
• Click and Pledge
• Luminate CRM

If You Want a System Like…
CiviCRM or Salesforce

Other CRM platforms are available, such as:
• Microsoft Dynamics
• SugarCRM
Making the Move

The Planning Process
In the first half of the project, define precisely what you're doing.

Identify Goals → Define Needs → Consider Improving Processes → Explore Options and Decide

Implementing and Rolling Out
Make sure to allot resources to these often-underestimated stages.

Implement and Configure → Migrate Data → Define Usage and Support → Train Users → Measure and Check in
Do You Need a Consultant?

Consultants can do a lot for your donor management transition. They can provide

- **Expertise**, if you’re not familiar with your options…
- **Knowledge** of what’s worked for others…
- **Project management**, to keep you moving forward…
- **An outside perspective**, if you’re likely to get weighed down by politics…
- **An extra pair of hands**, if you’ve already got too much to do…

You should, however, also consider a consultant to help with data migration.

Implementation, Configuration and Migration

Implement: Setup

Get it up, running, and working in its final location.
Install the System

A hosted system is likely to require little work in this area. If installed, determine if it will be installed on employee computers or on a server. Often vendors can help with this process.

Configure (and Customize)

Set custom options, fields, settings and permissions

Some vendors will customize for you, for others you’ll need to DIY

Data Migration

Moving data from one system to another is not as easy as it sounds.
The Process

How complicated and lengthy the process will be depends highly on how clean your data is from the start.

What Data do you Really Need?

Consider saving time and money by only carrying over your most important data.

Clean Up Inactive Records

Periodically remove, hide or suppress those who you deem inactive—perhaps those that are deceased or haven’t done anything in a really long time.
Clean up Duplicate Data

As part of the cleaning process, look for multiple profiles of the same person, and merge them. Most databases will provide reports to help.

Get Help With Migration!

It is always more time-consuming and harder than it seems.

Defining Usage and Integration
Know Who is Working With the Data

Set Clear Data Entry Guidelines

What rules should people follow when using the system?

How Do You Enter Data Uniformly?

Time frame for data entry?

How will it be recorded?

What will and will not be recorded?

Make sure to have clear instructions
Define Who Should Do What
What should each of your staff be doing in the database? Who's responsible for what?

Executive Director

Volunteers

other Staff

Development Staff

Consider Software Integration
You may wish for your new Donor Management System to integrate with other installed or hosted systems. This is often true in the case of accounting software.

Accounting Considerations

Batches Vs. Full Integration
While almost all donor management software will allow you to enter in "batches" of related data into an accounting system, this isn't always as desirable as full integration.
Supporting the Technology Transition

Don't Stop Here!

Training your users is key.
Make sure you provide the proper framework to support the transition process.

Define Usage and Support

- What rules should people follow when using the new system?
- Who will answer user's questions?
- Who's responsible for continuing success and reliability of the project?
Train People

Train on what to do with the data, as well as how to use the system.
Remember that they may need periodic refreshers.

Measure and Check-in

What measures will help you know if your new system is working for you?

Schedule an ongoing process to understand what’s working, how to fix what isn’t, and when it’s time to take another step forward.

Database Best Practices
You Need More than a Database

Your database, unfortunately, won’t fundraise for you. You need to define your processes to take the best advantage of it.

Best Practice Comes In Many Forms

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Track All Your Interactions

Make sure your institutional memory isn’t in your ED’s brain.
Track The Source of Each Individual

Did you meet this person at a conference? Did they register for an event? Introduced through a friend?

The source is invaluable information for segmenting and cleaning your data later on.

Tracking source can tell you what worked (and didn’t work) in recruiting different types of donors.

Make A Plan to Move Them Up the Ladder

A structured plan—for instance, a moves management plan—can help you define the next steps for each supporter.

Think About Moves Management

Donor information

Solicitors

Action Steps

Careful Tracking
Consider Group Moves Management
Encourage people, in bulk, to move up a level.

$50,000+
$25,000-$49,999
$10,000-$24,999
$1-$9,999

Use Ticklers, Tasks and Calendars
Remind yourself—or others—of important next steps.

Look for Trends in Your Data

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Use Reporting to Prioritize Your Time

- What high priority prospects haven’t been called in three months?
- Who gave in response to that email campaign?
- Who has increased their donation amount over 50% since the first time they gave?
- Who gave last year, but not this year?

Use Your Data to See What Worked

- What percentage of your new volunteers donated compared to old ones?
- What was the average gift?
- Should you do that campaign again?

What Should You Take Away From All This?

First, Don't Panic

It doesn't make any sense to take on everything at once.

Consider your Current System

Is it a problem with:
• Training.
• Support.
• Understanding.

Or is it really:
• Too Weak/Robust.
• Too Expensive.
• Out Of Date.
• No Longer Supported.

How can you avoid these issues with your new system?

Assemble Your Team

Make certain that everyone who will use the system is represented in the decision making and implementation process.
Determine Fundraising Priorities

Make a detailed list of fundraising processes. Then, use best practices and eliminate redundancies before you invest.

Envision Your Dream System

- What do you need or else the system is useless?
- What would be nice to have but isn’t a deal breaker?
- What would you want if money was no option?

Make a Shortlist
Compare the Systems with your Dream System

And choose the one that is best for you!

Questions?