CRM & Data:
The Building Blocks of Your Program

JUNE 27, 2024

MESG MARKETING

Our learning outcomes

- What you should expect from a Database

- How to get the most out of your system

- The importance and value of a system that is easy to use

- Understanding what data needs to be collected

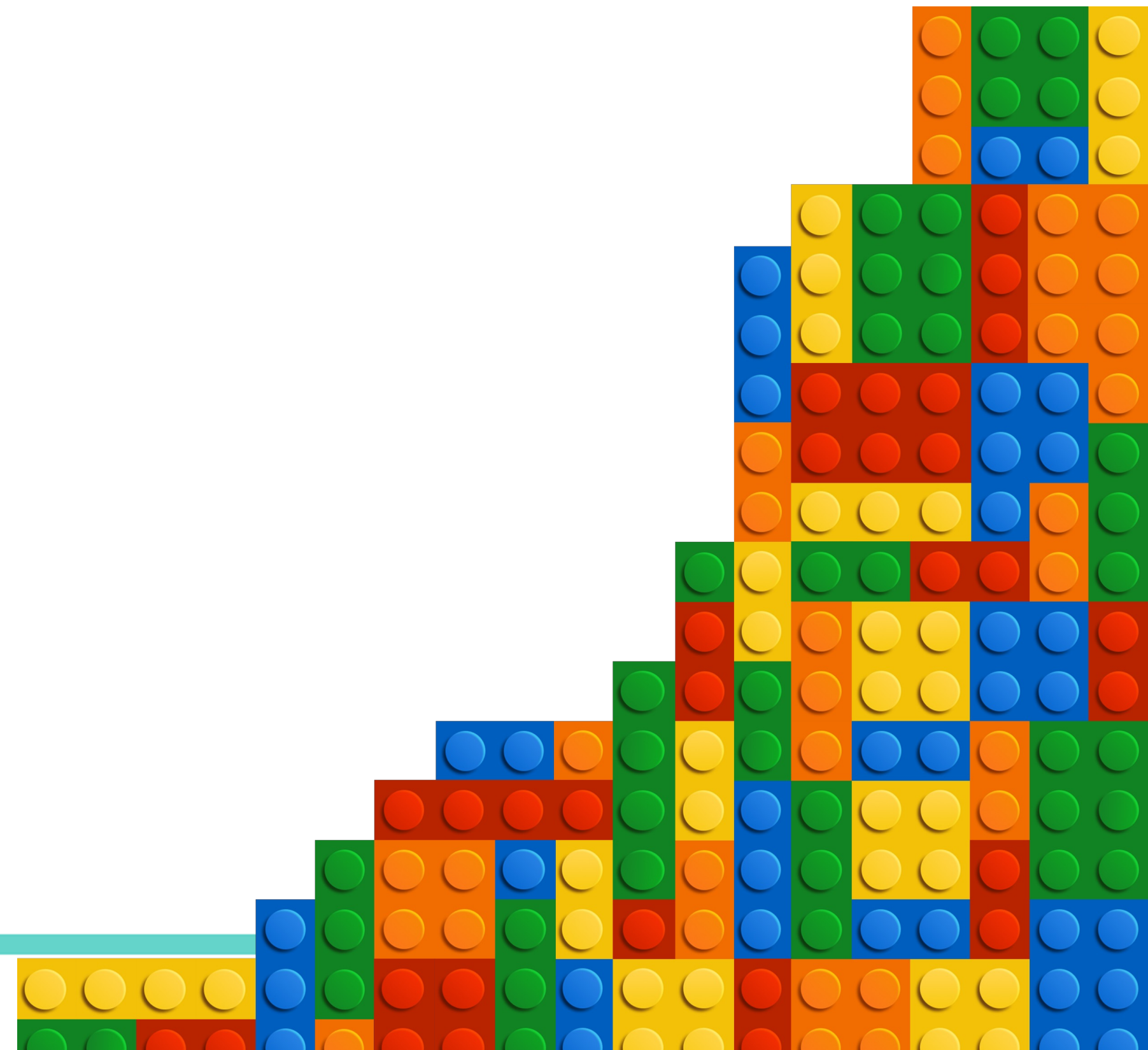- The difference between Processing Data and Analyzing Data

Data is fun! CRMs are not scary!

- Data get's a bad rap as being "hard"

- It is the foundation of direct response marketing

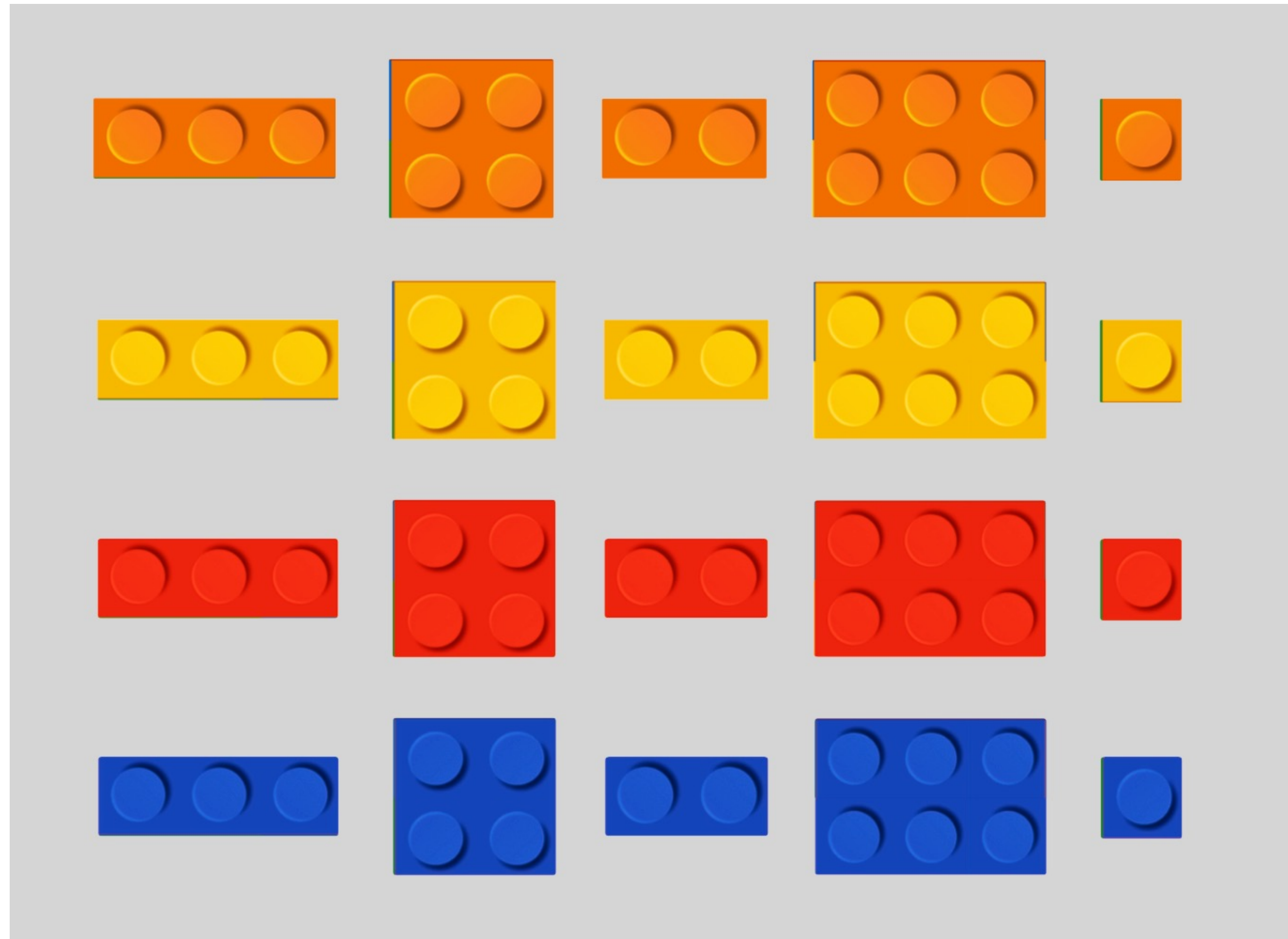- Two underlying concepts that help to make all the rest easy
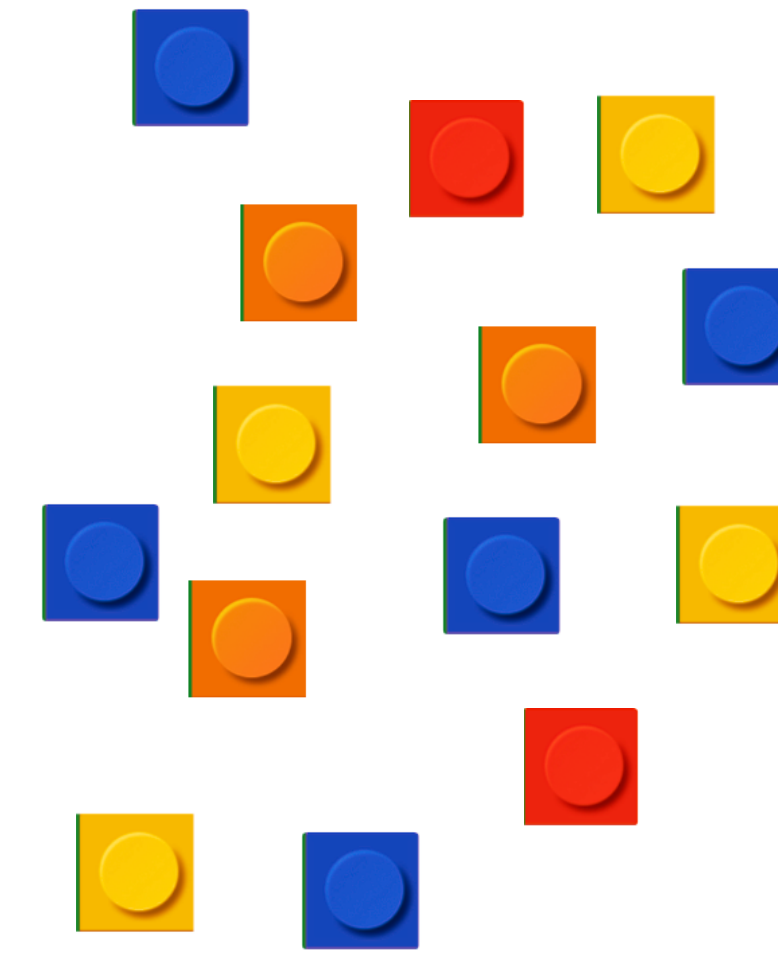
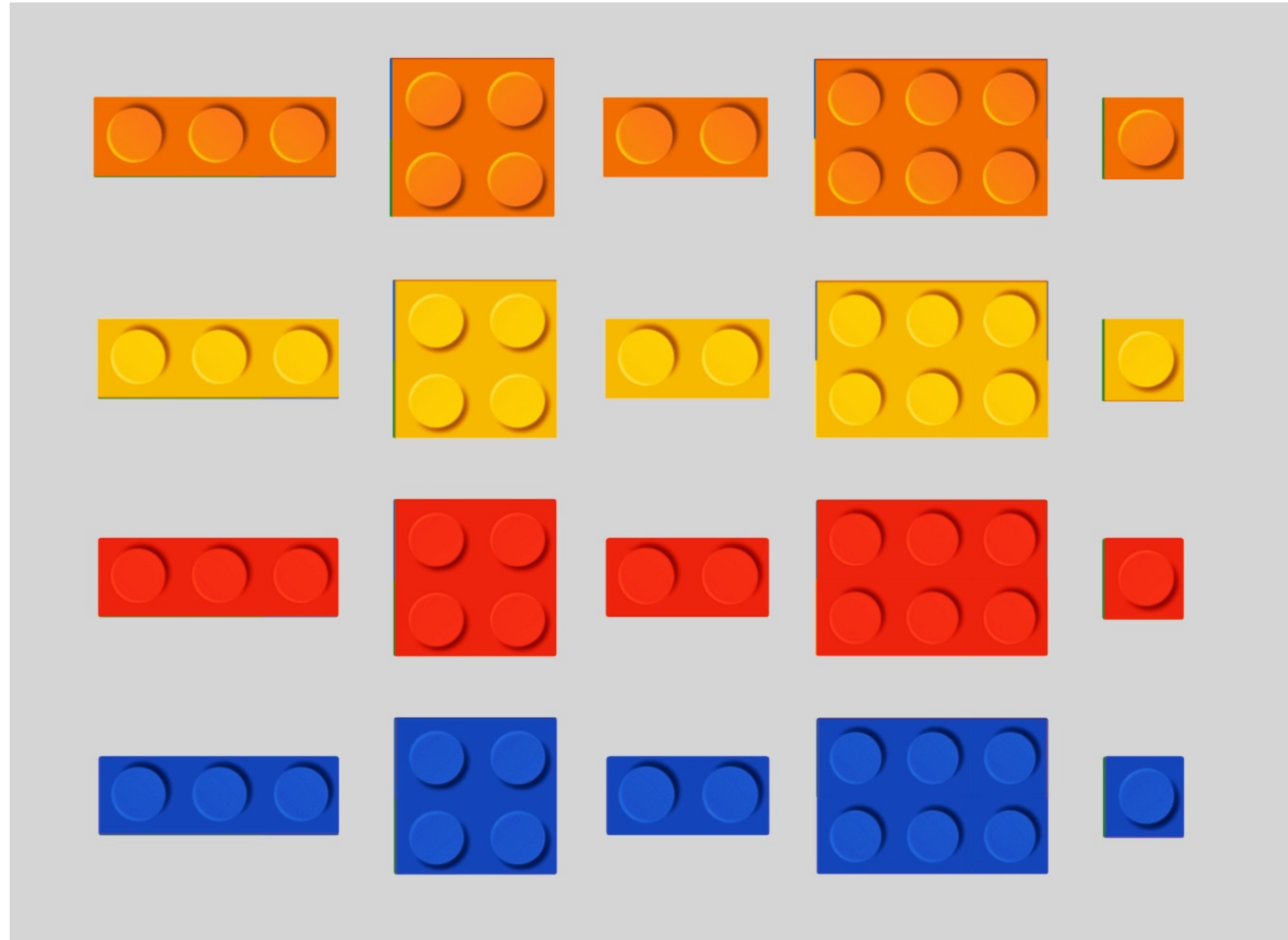# Spreadsheet v. Database?

- Can't I just use a spreadsheet?

- 2D v. 3D data

- Let's play!

Spreadsheet v Database
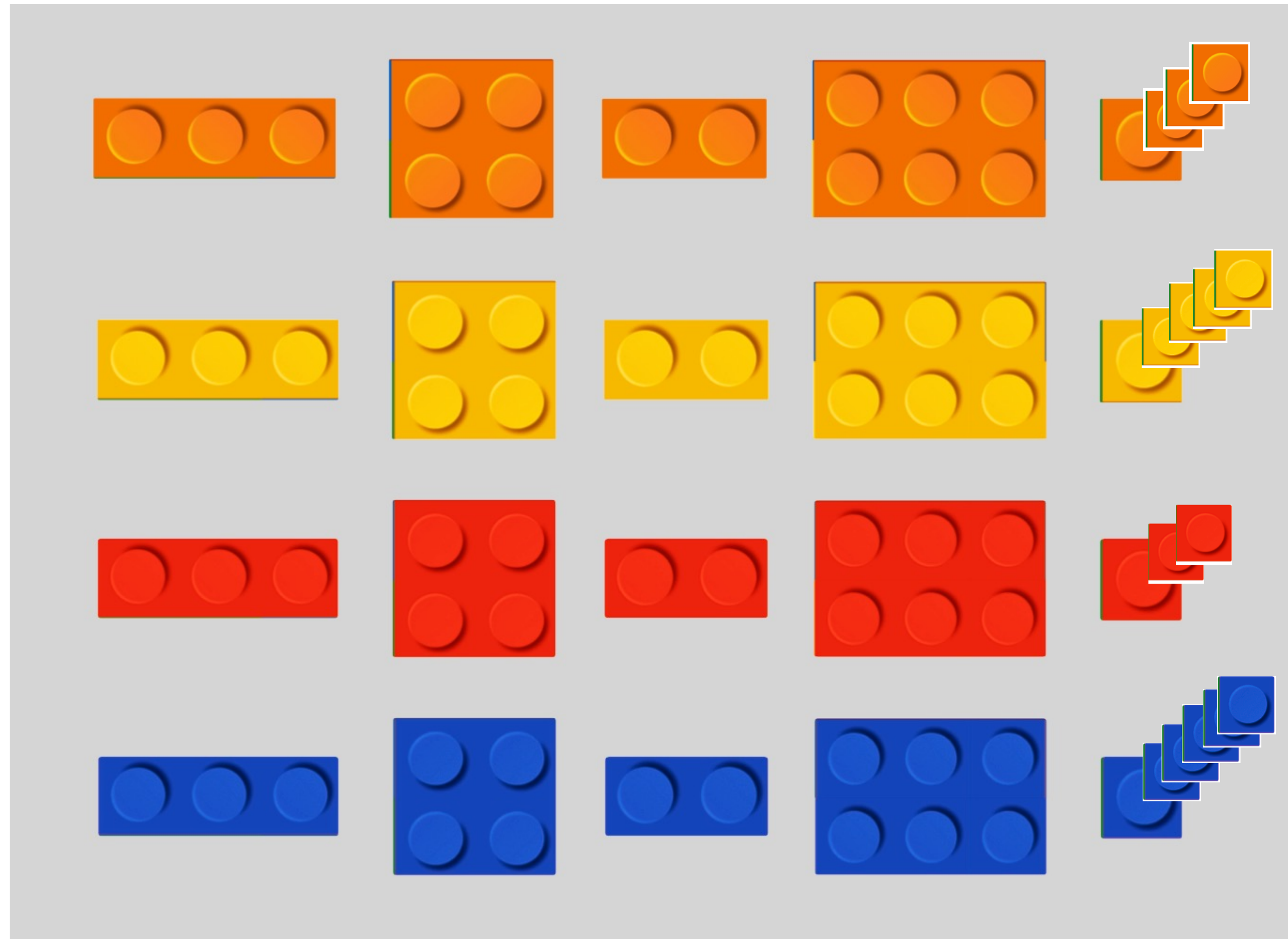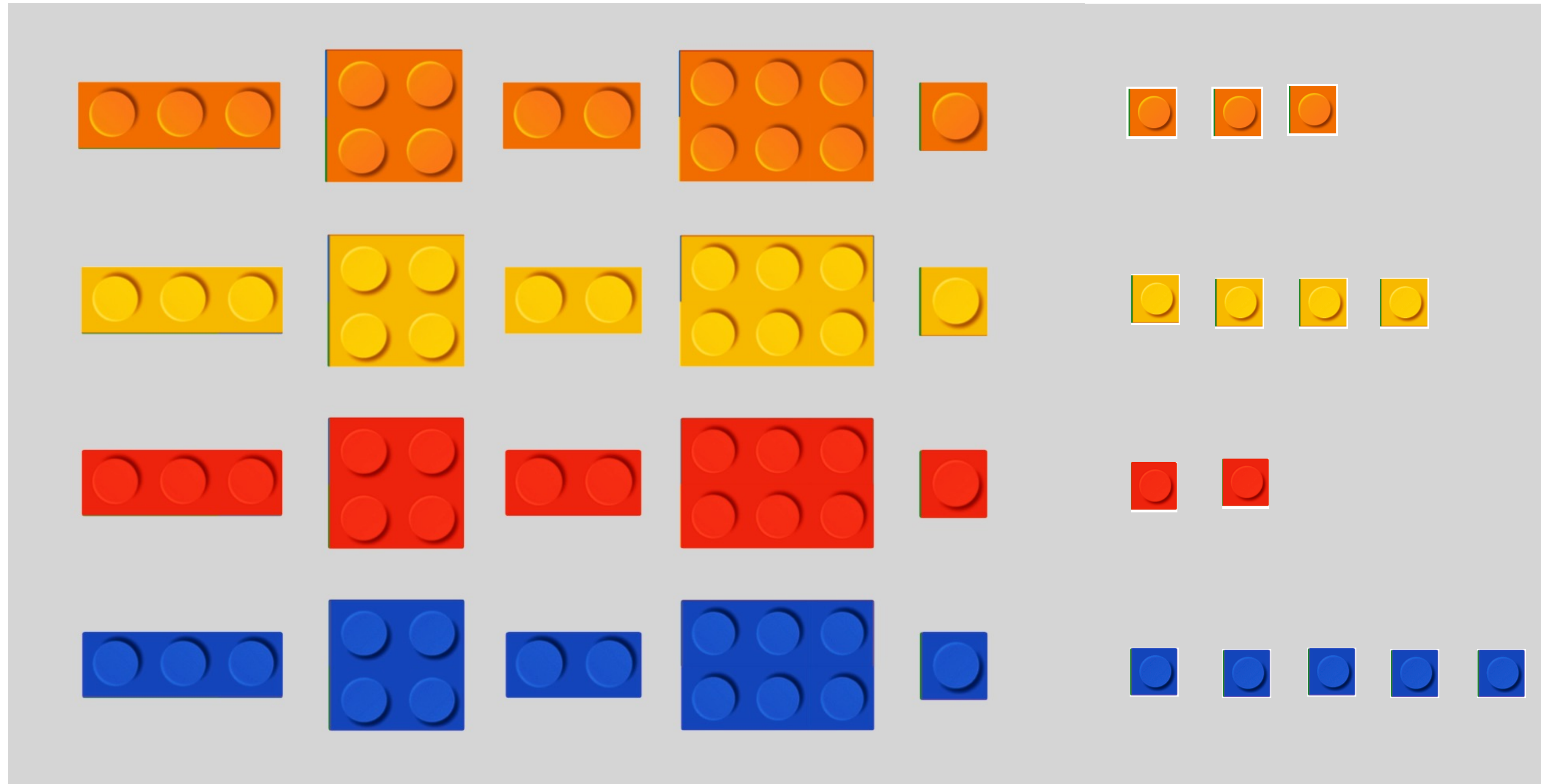
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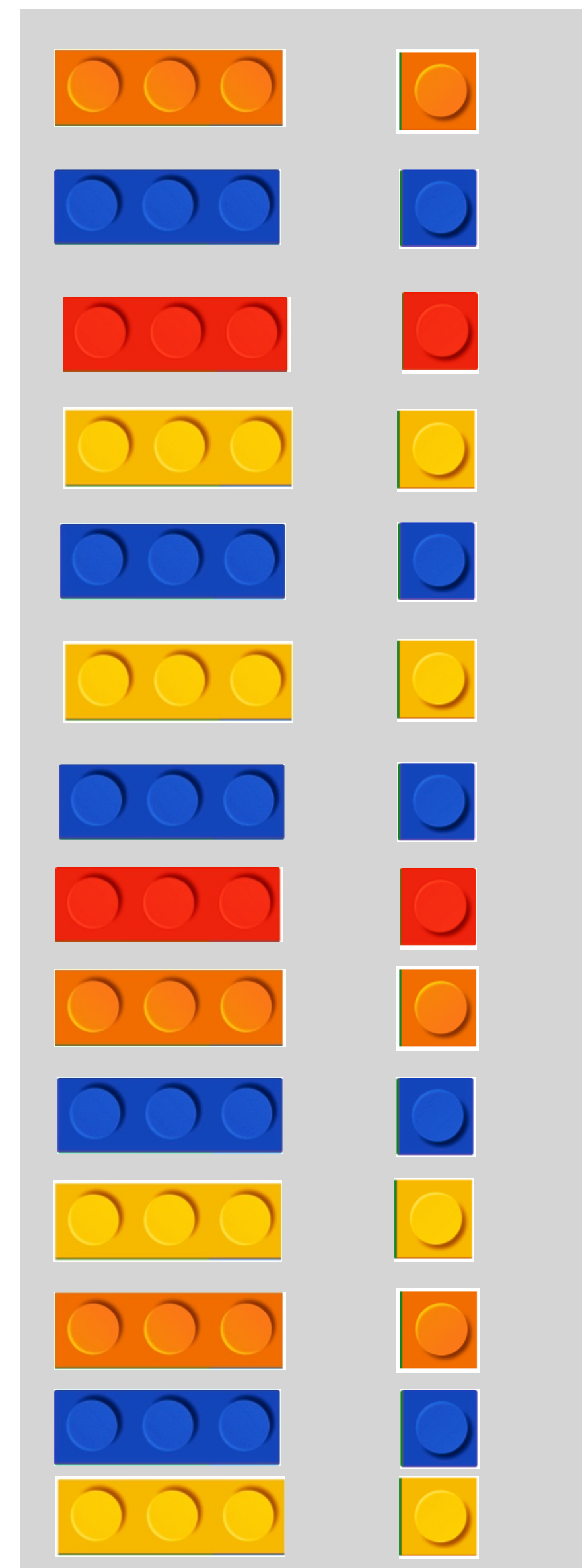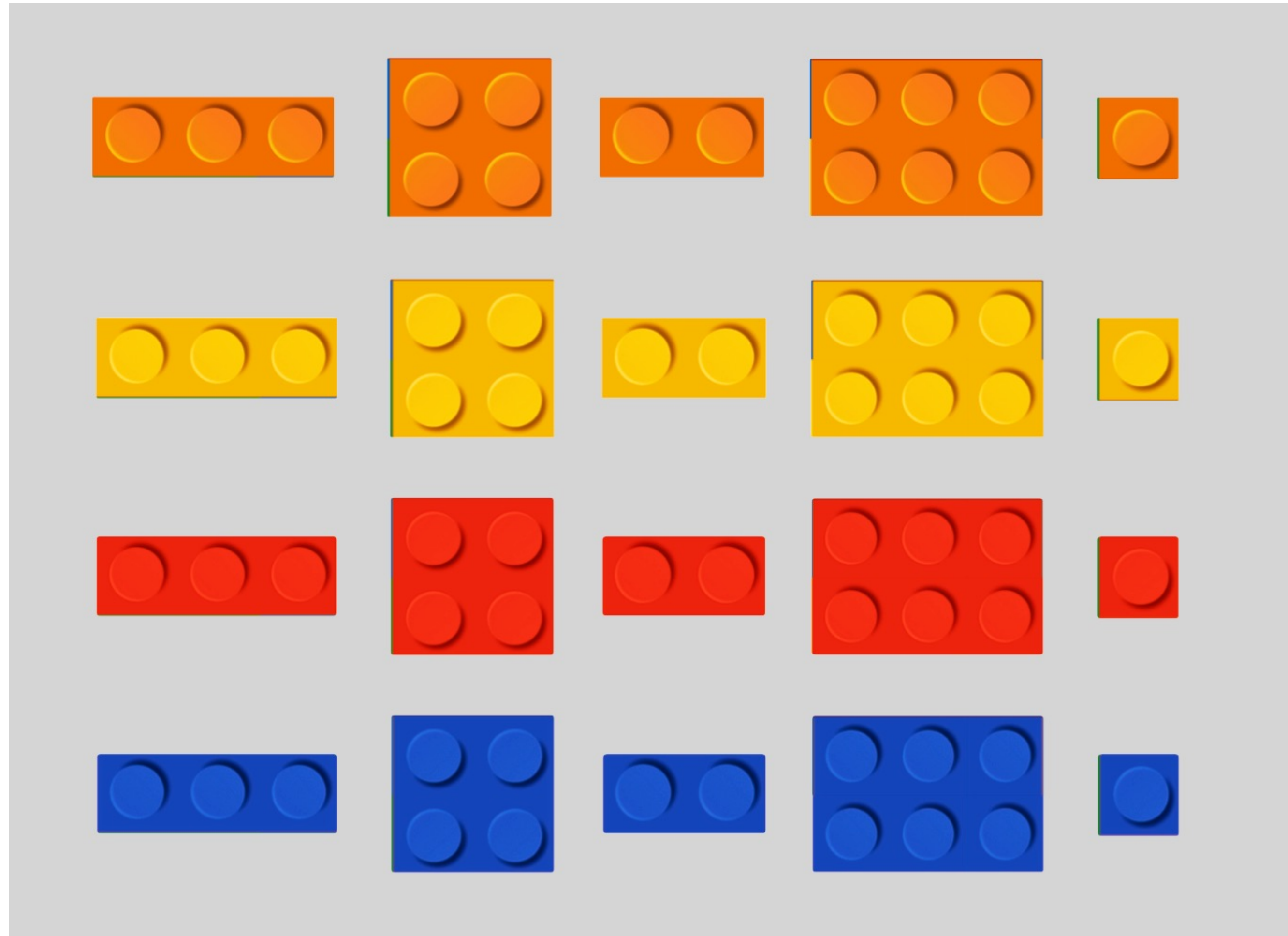
Spreadsheet v. Database?

- 3D data enables you to create a 360 view
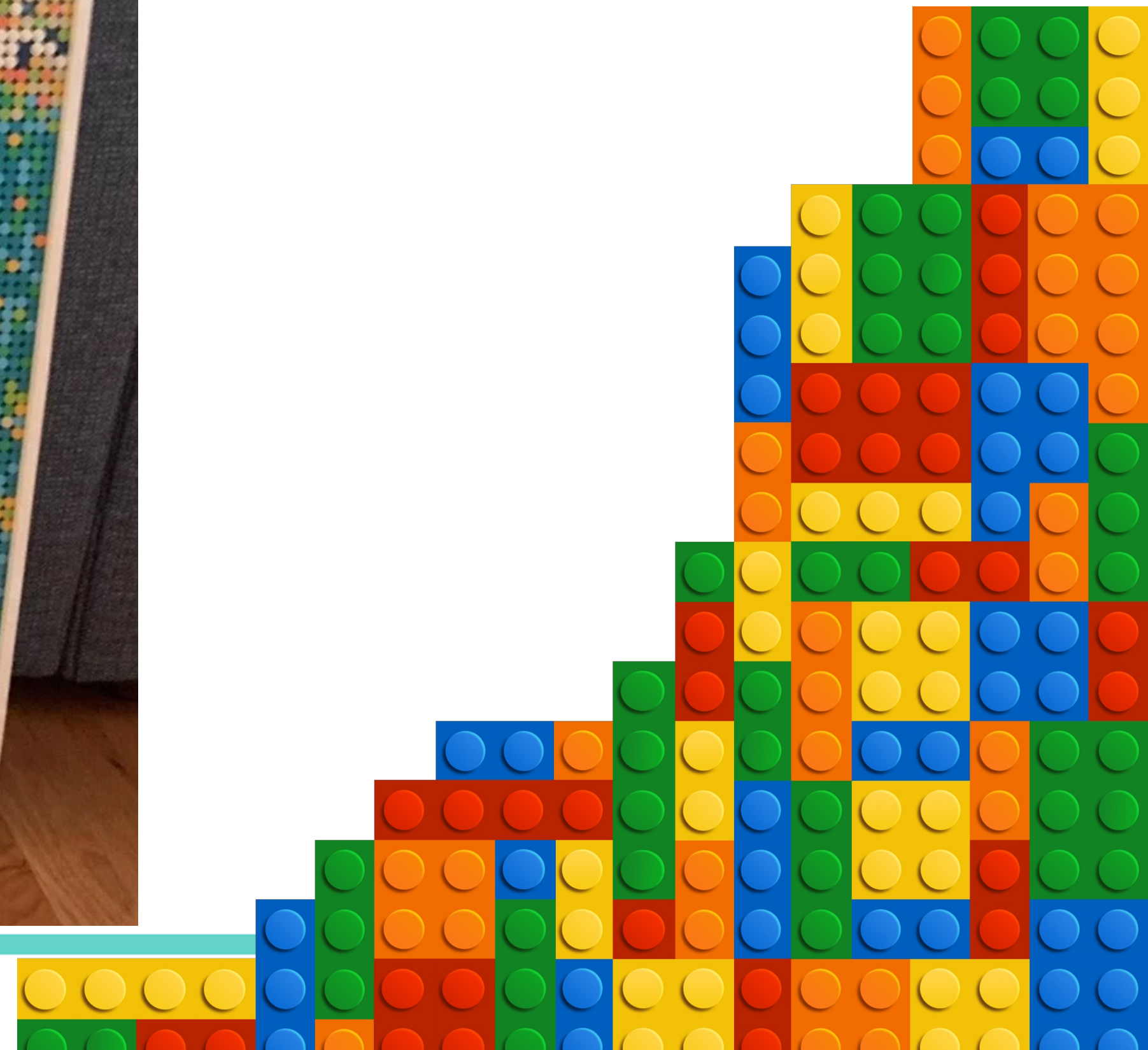
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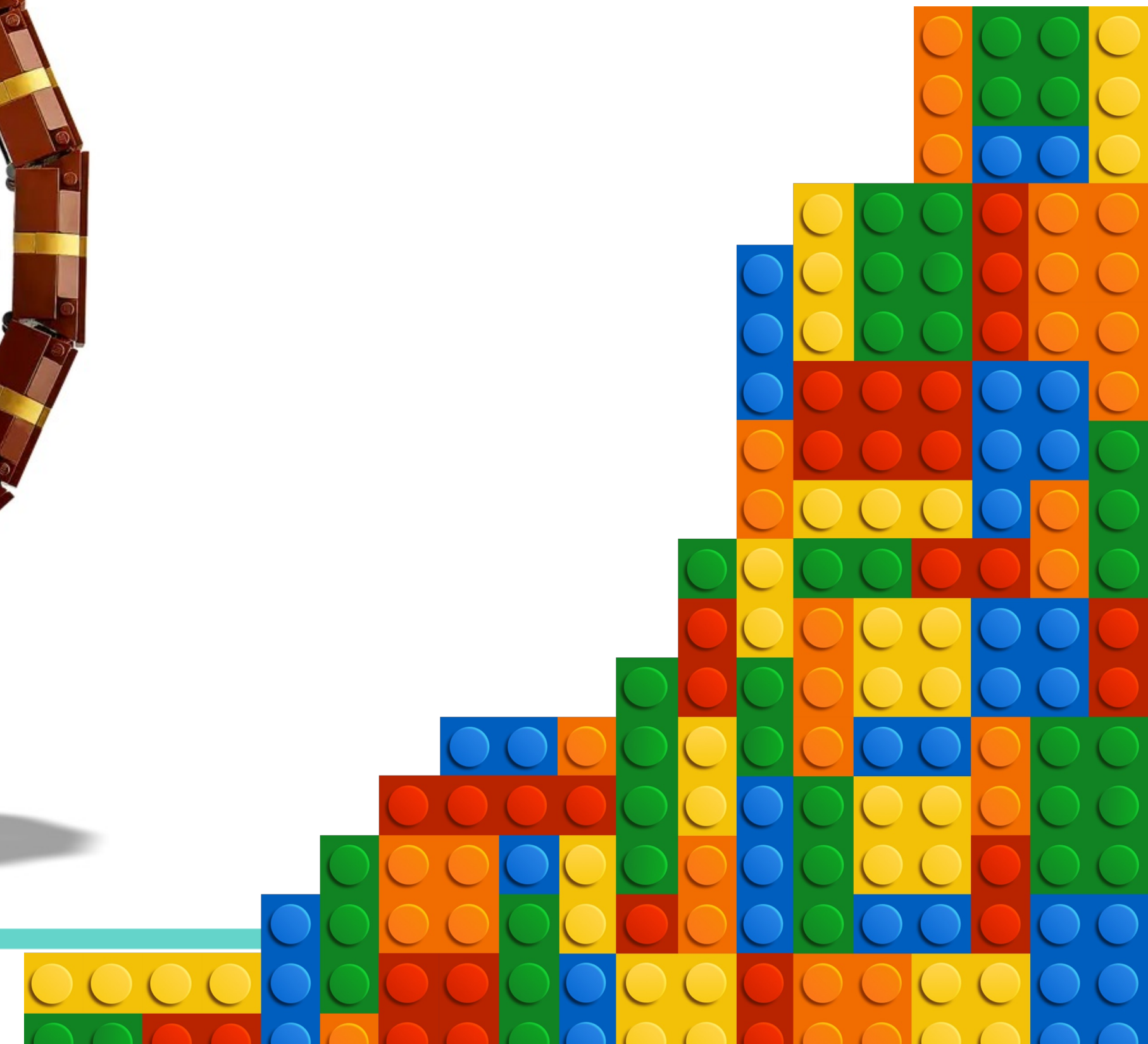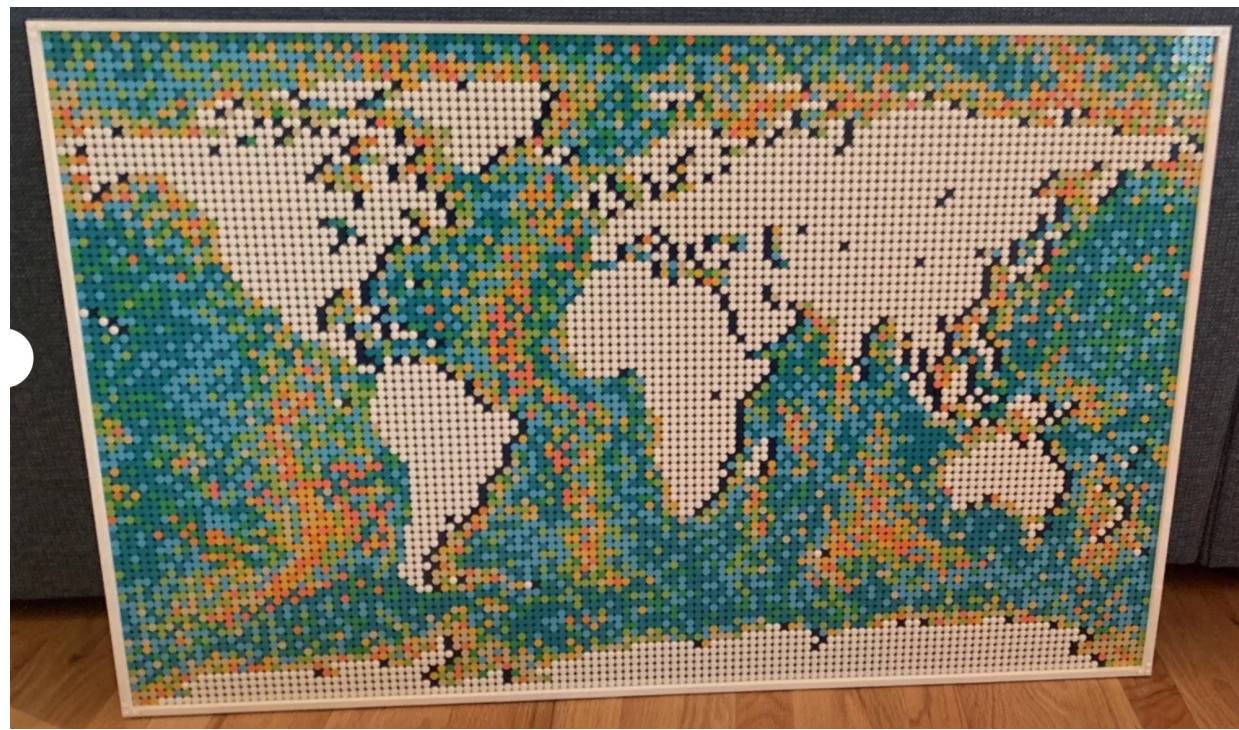
- 3D data enables you to create a 360 view

What goes into a 360-degree View?

THE BASICS
- Biographical Information
- Contact Information
- Family Members
- Relationships

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

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

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

Source Code: Foundation of Direct Response

- Direct Response is about measuring specific outcomes of specific asks to specific individuals

- Measured using Source Codes
    Position Based
    Section Based

Source Code: Position Based

Position 3
Month
A-L

Position 5-8
Audience Code

Position 1 & 2
FY
24

Position 4
Program
A=Appeal
R=Renewal
K=Acknowledgement

Position 9 & 10
Channel
ML=Mail
EM=Email
FB=Facebook
TM=Telemarketing
TX=SMS/MMS
DY=Display
TW=Twitch

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For an FY24 Email Appeal in March to the Midlevel 1 audience the source code would be:

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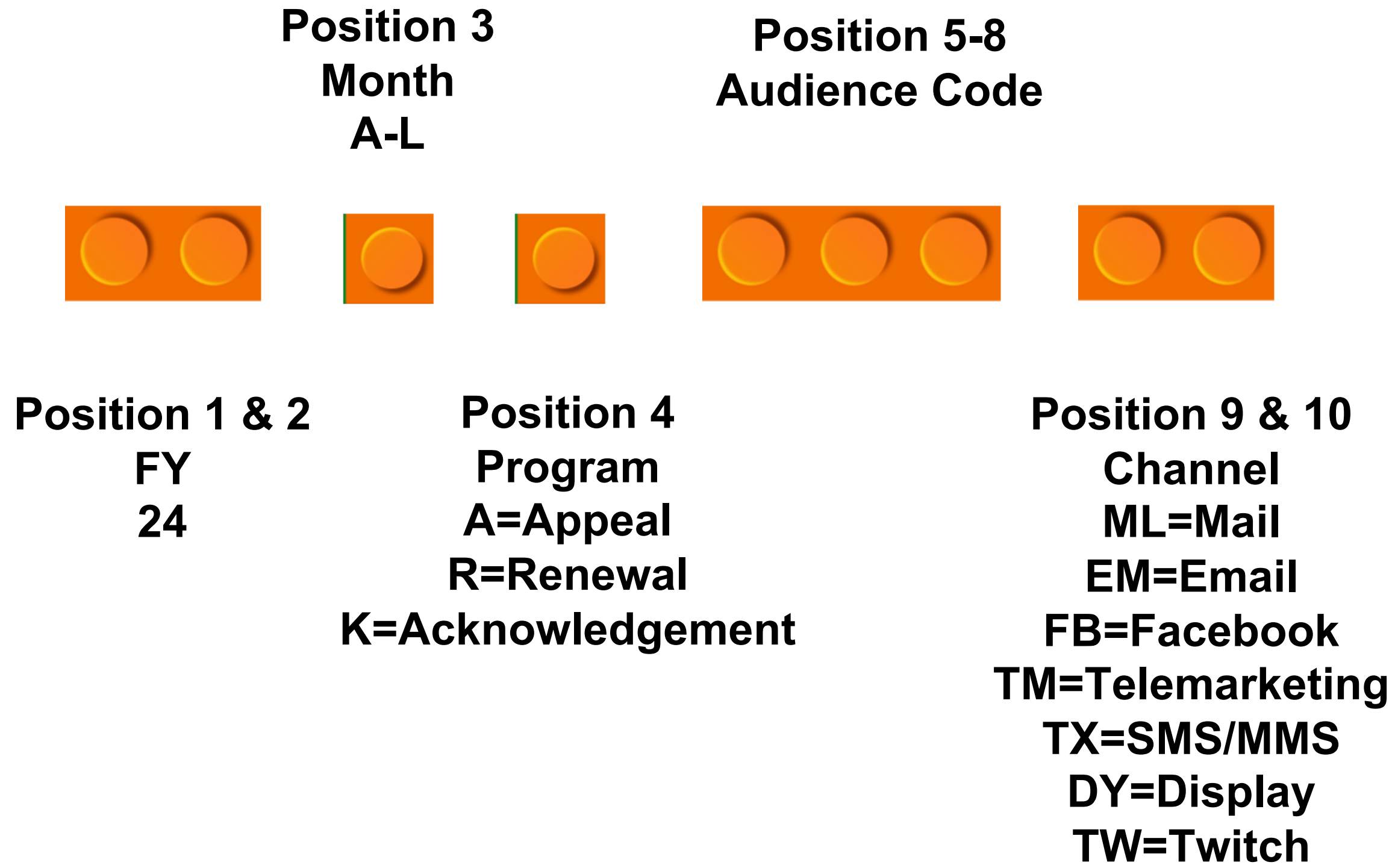
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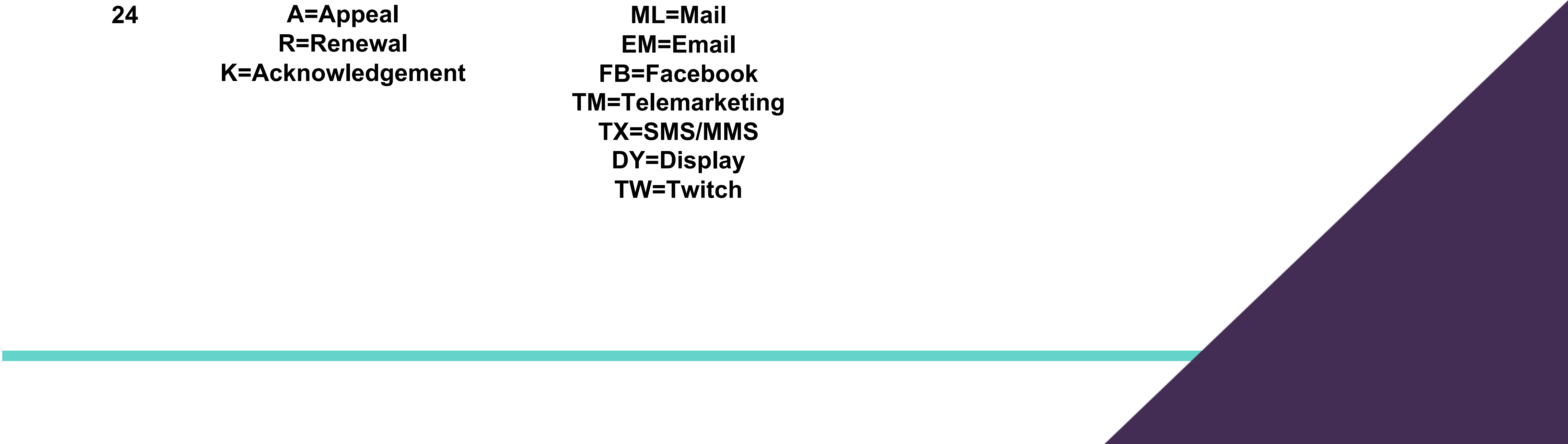
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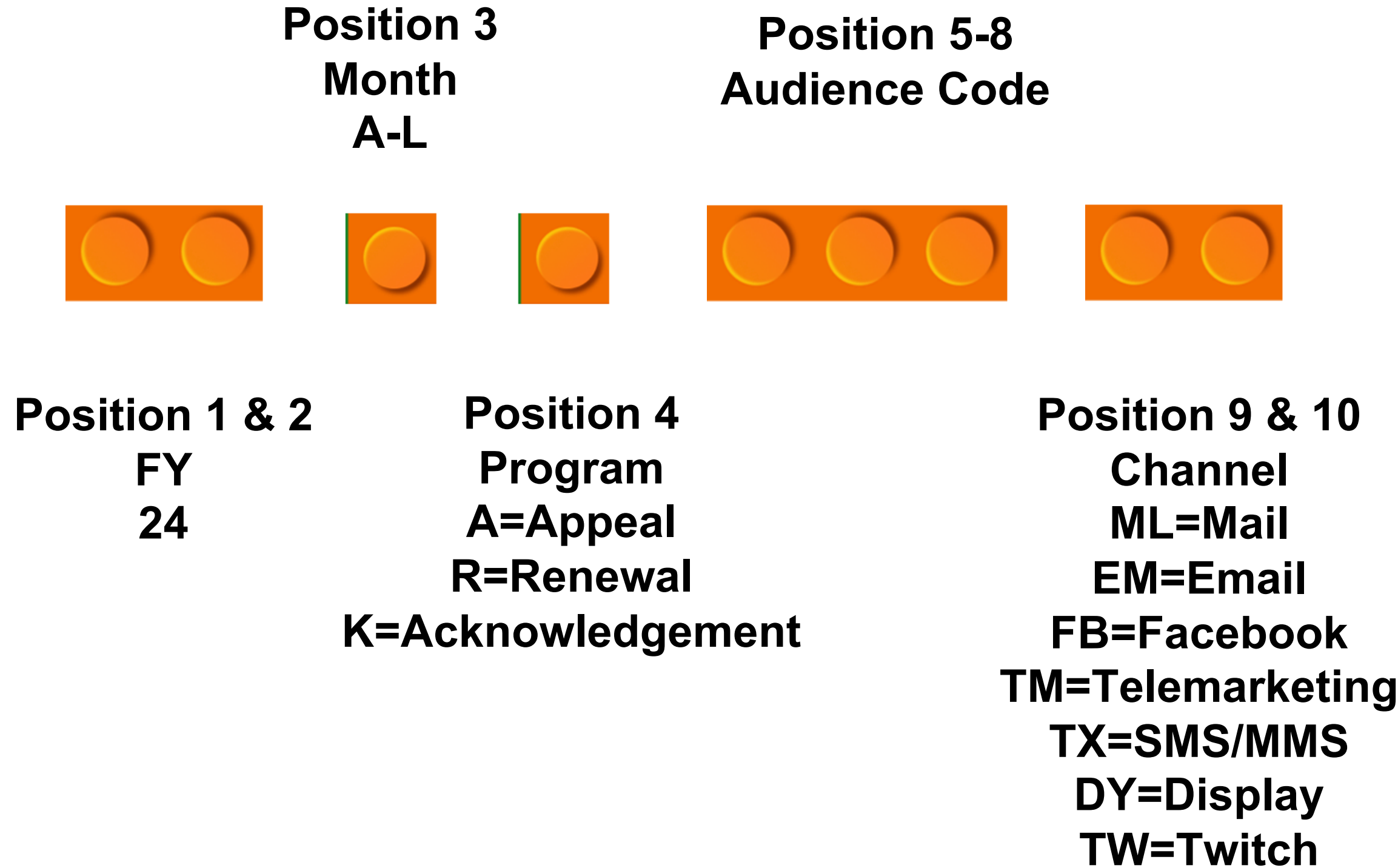
24CAM001EM

Source Code: Section Based

- You separate each section with an underscore or a dash
- The length of each section is unimportant, the divider is critical

Section 1 Date 20240626

Section 2: Campaign Save the Treehouse!

Section 3: Channel fbad1

Section 4: Audience fbfollowers

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Section 1 Date 20240626

Section 2: Campaign Save the Treehouse!

Section 3: Channel fbad1

Section 4: Audience fbfollowers

20240626_savethetreehouse_fbad1_fbfollowers

So what is the right database for you?

Fundraising / donor management

Anedot, arreva, B Generous, 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, cadmium CD, 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, 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, Radicle Health, Therapy Brands, Social Solutions

Event / volunteer management

BETTER IMPACT, galaxy, Helper Helper, InitLive, RunSignup, SignUp.com, Vee, VolunteerHub, WEBCONNEX

Digital services / marketing

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

Payments / Tithing

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

*Inclusion or exclusion on this slide does not constitute a recommendation or review!

So what is the right database for you?

- The one that requires the least customization

- The one that has core functionality that aligns with your program

> Membership
> Premiums
> Major Gifts or Grants
> Peer-to-Peer

- Can easily integrate with the elements that you need

So what is the right database for you?

- Do you have the staff to support integrations, or should you be looking for an all-in-one solution?

- What is the process for deduping? And if you have to integrate what is the process?

- Are you looking for online only? Offline only? How will the data work together?

- What are the must have digital bells and whistles?
  Upgrades/Upsells
  Custom subdomain(s)

So what is the right database for you?

- Simplicity for adoption

- The more complex the system, the more education required to ensure adoption

- How do queries work? Does it make sense?

- What do you really need to know about your donors?
	Seasonal Address?
	Householding?

- How do you need to be able to connect your data for analysis?

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As important as the database: the QUALITY of the data

- 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 it, 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.

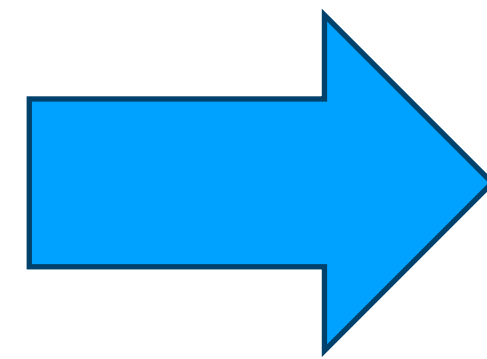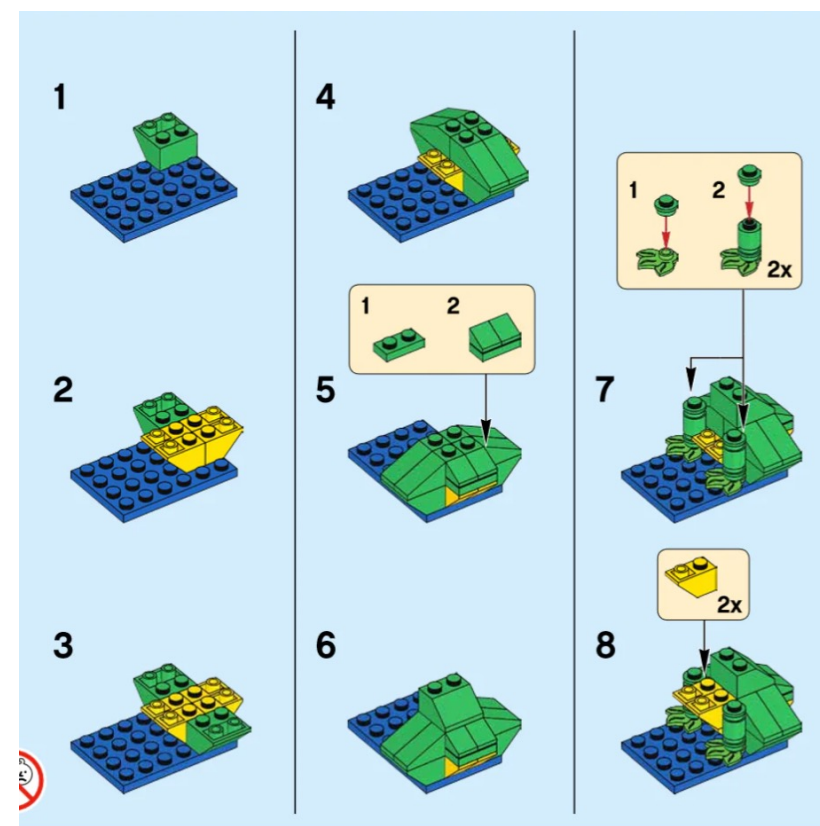# Processing v. Analyzing

- Processing: Cleaning, Sorting, Appending

Making the Data Usable
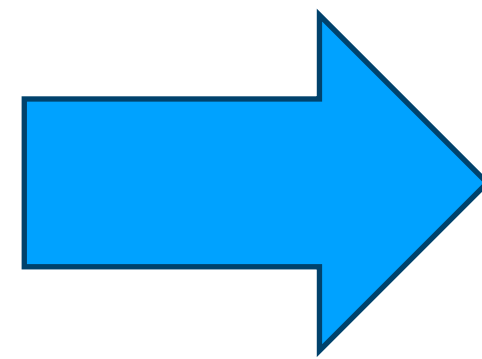
Processing v. Analyzing

- Analyzing: Leveraging the collected data

  Making Sense of the Data

What Question are you trying to Answer?

- You can go down a variety of paths when analyzing your data.

- The more data you have the greater the possibilities.

- HOWEVER – it is important to have questions, theories, and key metrics
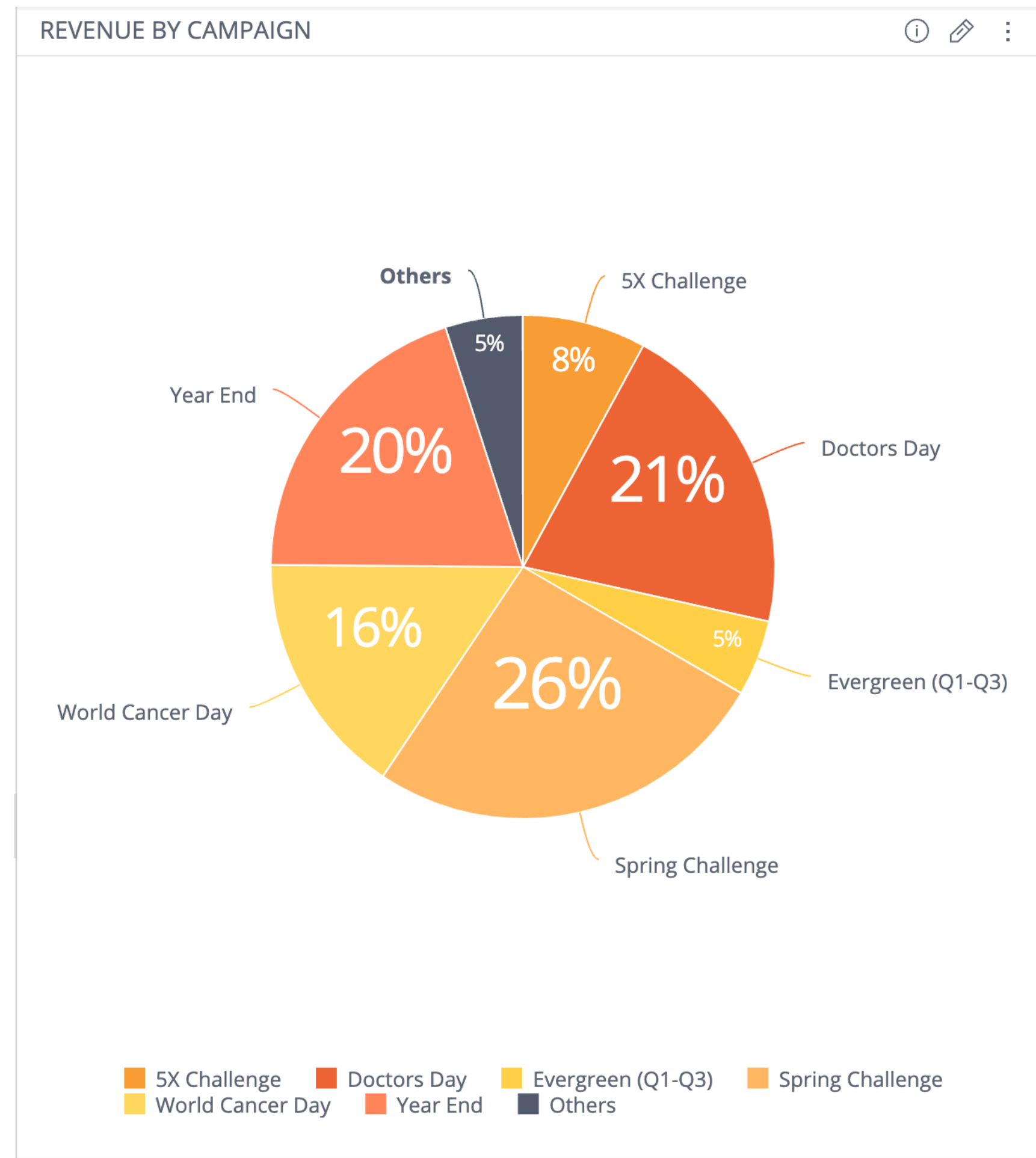
Accurate, Accessible, Actionable

- **Accurate:** Critical that your analysis is accurate. This means making sure that the ways that you are connecting your data are solid

Accurate, Accessible, Actionable

- **Accessible:** The visualization must be both meaningful and easy to understand

Accurate, Accessible, Actionable
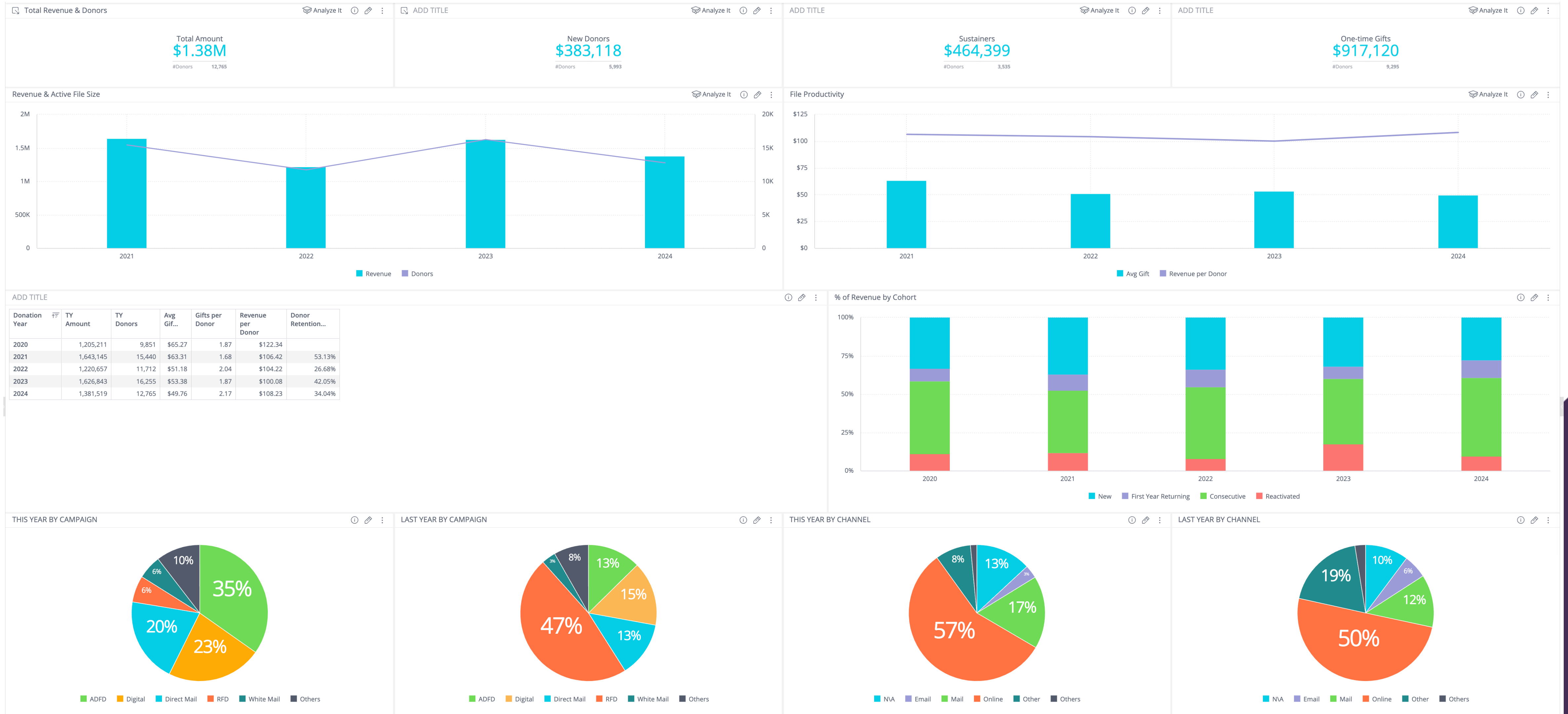

REVENUE BY CAMPAIGN

- Pie Charts are easy to understand, but do they provide enough context?

- What could make this better?

Accurate, Accessible, Actionable

- **Actionable:** You can create 'interesting' views that don't move your program forward. Focus on KPIs that let you take action and advance.

Accurate, Accessible, Actionable

What is next?. . .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?

Thank you!

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