Clean Data and Tools for End of Year Fundraising

9/22/2020

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Meet Our Presenters

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Our Agenda Today

Welcome & Introductions

Donor Centric Fundraising
Ensure the health and safety of our community and high reliability of our platform

Giving Tuesday & Resources
Giving Tuesday and other helpful resources

Tools & Tips for End-of-Year Giving
Create a data plan, segment your audience, and focus your ask
Nonprofits Face Various Challenges

“If we hadn’t dug deep and done all the work to digitize our mission over the last few years, we wouldn’t be so well set up to succeed”

Eric Dayton, Director of Data, buildOn
Crisis Impact on Nonprofits

Challenging Times

- **Operations**
  - Reduced staff, time, working from home

- **Events**
  - Challenges convening

- **Donor Meetings**
  - Roadblocks to transformational giving

- **Revenue Fluctuations**
  - Dips and surges by gift types

- **Forecasting Issues & Challenges Investing**

- **Need to adapt to change**

Evolve Fundraising Strategy & Tech

- **New ways to work digitally**
  - Improve processes

- **Digital events**
  - Reach new audiences

- **Connect to supporters**
  - Engage & Automate

- **New funding opportunities**
  - Diversify fundraising

- **Greater Agility and less Risk**

- **More transparency between stakeholders**
Cross-Team Alignment to Scale Your Impact

Marketing  
Fundraising  
Programs

Personalized Message < > More Donors  
Impact Data < > More Funding  
Better Data, Collaboration, and Alignment

Data-Driven Teams Create Donor-Centric Experiences

How organizations exceed goals and fund their mission

Digital First  
Single Source of Truth  
Actionable Insights

Donor-Centric & Data-Driven

100% access, any system or device
Donor-Centric Journey for End of Year Giving
What is our overall message and experience?

Other Activities
Capital/Annual campaigns, etc

Major Donor Appeal
& Development activities

Events
Galas, Bar Events, P2P

Giving Tuesday 12/1
Online giving & corporate matches

Segmentation & Campaign
Set the theme and campaign

ADL Transformed Their Giving & Staff Experience
Before and after their digital transformation with Nonprofit Cloud

1 Single CRM & Source of Truth
15M personalized emails
75K Constituent Profiles Unified
160% YOY for Giving Tuesday
450+ disparate files across chapters
Batch & Blast, Inconsistent across chapters
Little access to untrusted supporter data
Flat YOY Giving
Disconnected programs & impact
2000% increase in giving after disaster

“Our focus is to provide a great experience for all of our supporters, but also our staff, with modern tools they can use to fundraise”

Maryanne Nigro
Director Development Operations, ADL

“95% Deliverability”
How to engage on GivingTuesday

Relevance: Why your org matters in this moment.

Authenticity: Examples of the challenge/ how you’re responding

Urgency: We can’t do it without you now

Bonus...Creativity: Break the mold and try something new
Tools, Tips & Takeaways
Things you can do for end of year to maximize giving

Create a Data Plan
Target the Right Donors
Focus Your Ask
Donor-Centric Experiences Require Clean Data

How much of your supporter do you really know?

*SUPPORTER DATA

Constituent Contact Preferences Wealth
Network Household Organization Influence
Engagement Digital & Web Staff Activities Events
Support Donations Volunteering Advocacy

% of fundraising professionals say they have good data quality in CRM*

Create a Data Plan
Pick a Good Home for Your Data

MANAGE

Sensitive Data
Offline Data
Source Data
Engagement Data
Gift Data
Custom Data

CAPTURE

Household Contact Activity Engagement Custom

ANALYZE

Data Integrity
Robin Hood is a Trailblazer

Robin Hood Multiplied its Donor Base by 300% in 2020 and found 10X the duplicates...

Robin Hood reimagined their gala as a broadcasted benefit concert with Tina Fey, raising $115M and gaining more donors, which meant more data. In preparation for end-of-year giving, they implemented Insights Data Integrity, which found 10X the number of duplicate contacts in Nonprofit Cloud, saving them money, time, and creating a better donor experience.

“Data empowers us to achieve our mission to lift New Yorkers experiencing need out of poverty, measurably and sustainably.”

Sheila Kelly, Chief Advancement Officer, Robin Hood
Define Your Audiences
Atlanta Mission's Unique Audiences

**BRIA**
Back Urbanite
First Involvement: Volunteer
Empathy Statement: There are youth in Atlanta experiencing homelessness that can use your help.

**MOLLY**
Urban Influencer
First Involvement: Volunteer
Empathy Statement: Homelessness is a problem in Atlanta, you can make a difference by volunteering with Atlanta Mission.

**ALLY**
Aspiring Activist
First Involvement: Volunteer
Empathy Statement: Give back and get involved in your city through Atlanta Mission, helping those facing homelessness and addiction.

**BOB**
Buckhead Boomer
First Involvement: Donate
Empathy Statement: Make a difference through Atlanta Mission, a faith-based organization transforming lives.

**SARAH**
Suburban Super Mom
First Involvement: Donate
Empathy Statement: Life gets busy - we’ve made it easy for you to give back without sacrificing time with your family.

**FRANK**
Rickle Flock
First Involvement: Donate
Empathy Statement: A small donation can make a big impact in the life of someone experiencing homelessness.

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Atlanta Mission’s New Donor Journey

**Step 1**
5K Participant

**Step 2**
Prospect Automation

**Step 3**
Olivia Becomes a P2P Fundraiser

**Step 4**
Automated Thank You Emails

**Step 5**
Donor Welcome Series

**Step 6**
Converted to Monthly Donor

**Step 7**
Welcome Kit
Atlanta Mission’s Development Journey

Step 9
Madison Reviews Donation

Step 10
Moved to Mid Donor Tier

Step 11
Tour

Step 12
Champion Series

Step 13
Champion Kit

Focus Your Ask

Leverage data insights

Deliver the right message to the right constituent

Create cross-channel journeys for your supporters

Make the right ask
Best Practices with Email
Driving an experience that compels & converts

- Custom Ask amount for each visitor
- Dynamic content with impact (Ex: by program)
- Personalized message with giving history data
- AB test content for performance
- Additional messaging and social share
- Branding and/or photography

Best Practices with Donation Pages
Driving a donation page experience that compels & converts

- Custom ask ladder and the ability to define per donor
- Cover donation fees
- Designate to programs
- Compelling campaign message & description
- Simple, branded, mobile friendly page
- Additional messaging and social share
- Branding and/or photography
Benefits:
- Matching
- Quick and easy for you and your supporters; supports can extend reach
- Low friction for previous donors

Considerations:
- No data capture
- Difficult to thank
- Funds disbursed slowly

**Facebook for Giving Tuesday**
Targeting New Audiences

**Facebook Fundraising on Giving Tuesday**

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<th>Year</th>
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<th>Matching</th>
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<td>0</td>
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<td>0</td>
</tr>
<tr>
<td>2018</td>
<td>75</td>
<td>30</td>
</tr>
<tr>
<td>2019</td>
<td>125</td>
<td>60</td>
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**Shared Hope & Donor Acquisition via Facebook**

FB Ads request info in exchange for downloading an educational tool, alongside advocacy

All supporter information that flows into Pardot flows into Salesforce in mapped fields.

If supporters’ information is entered into Salesforce, that flows into Pardot in mapped fields.

58% Increase in donor acquisition
QUESTIONS?

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thank you