

Donor/Member Retention Best Fundraising Practices Building Your Organization's Membership & Annual Donor Base



RILWP Workshop June 2, 2009



Overview - Relationship to Donor Database

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Choosing Your CRM System



Evaluation of CRM programs is not part of today's program. You can find information to assist in your organization's decision making process at the RILWP website under the 2009 conference workshop presentation on Salesforce.

CRM = Customer Relationship Management

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Presentation Available



This evening's Powerpoint presentation is available via Internet so that you don't have to worry about taking notes and so you can share the workshop within your organization.

A second Powerpoint presentation including 'recipes' for the Salesforce reports shown in the presentation will also be available by request.



Part 1 – Information Management Needs

Data, CRM, Starting Out, 2 Examples

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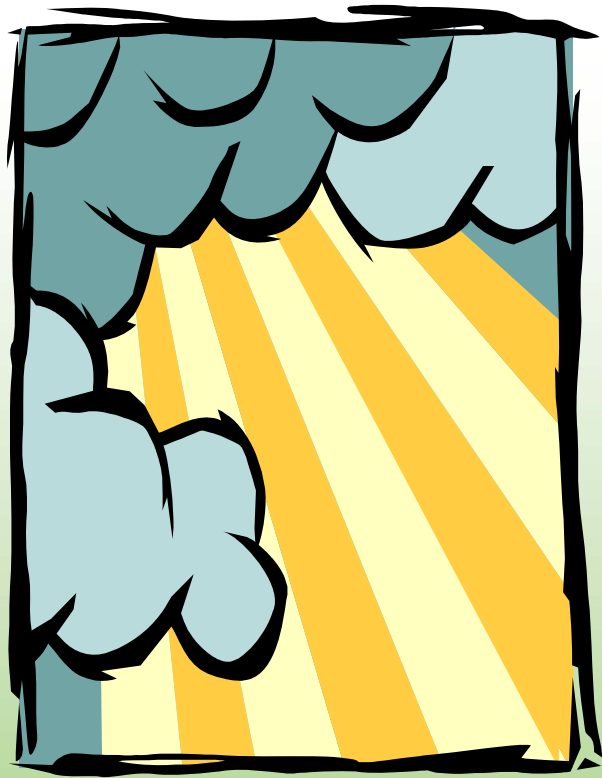


Gayle's Fundraising Fundamentals

- ✧ Donors are in the driver's seat.
- ✧ Keep the donors and members you have.
- ✧ Planning is essential to a robust program.
- ✧ To grow you must: retain, replace and raise your donations compared to last year.
- ✧ You must present a compelling case for support.
- ✧ You must ask.
- ✧ Good data and the ability to retrieve it is essential.



Understanding Your Donors



Each aspect of fundraising growth relies on your organization's ability to record and analyze information about your donors and their giving patterns.



Understanding Your Data



**Many of our
RILWP partners
have adopted
Salesforce, but
data collection
and reporting can
be done with any
CRM program
and it can even
be done by hand.**



Understanding Your Data

Salesforce, or any other CRM software, is simply a tool. Your organization will still need to do the thinking and analysis, that makes the donor data you collect meaningful to your fundraising efforts.



Don't Be Daunted – Commit, Plan & Take Action!

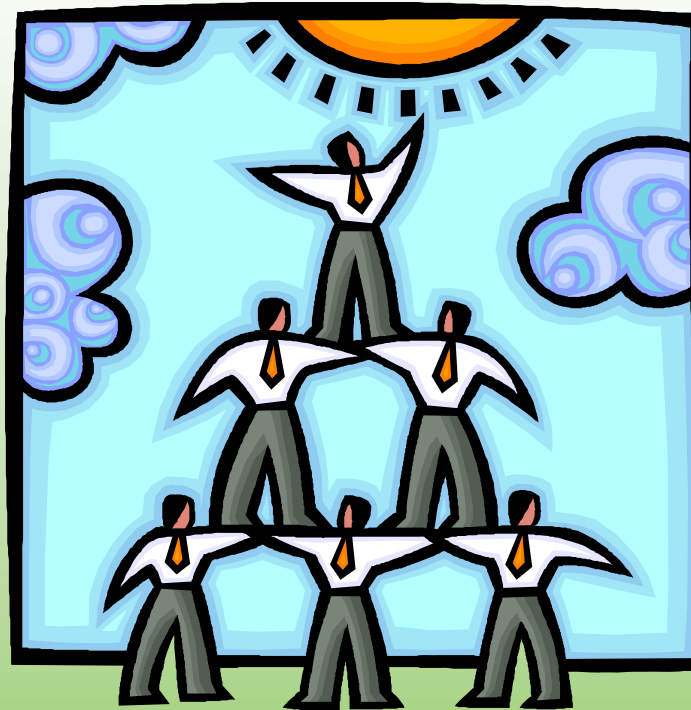
**Your information does not have to be complete
to move forward.**

**Your plan doesn't have to be perfect to get
underway.**

**Your organization must make a commitment.
Your investment must include adequate staff
and/or volunteer time.**



As you move forward with your plan, your organization will learn more about your donors. After your first effort, you will be able to improve your next campaign or event!

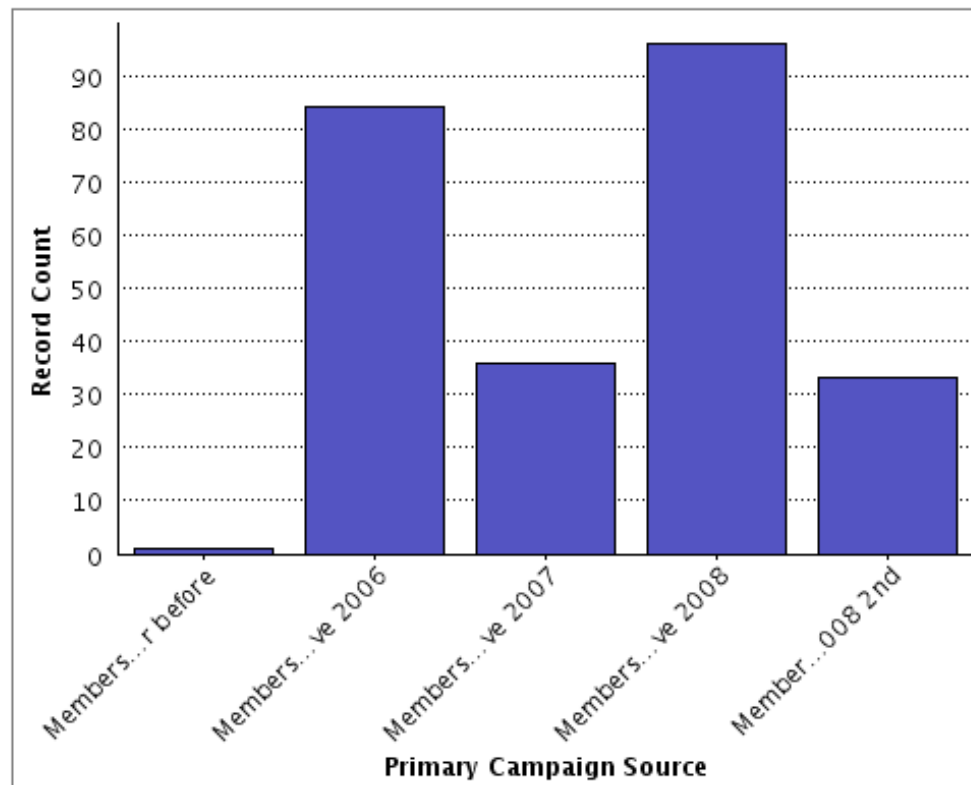


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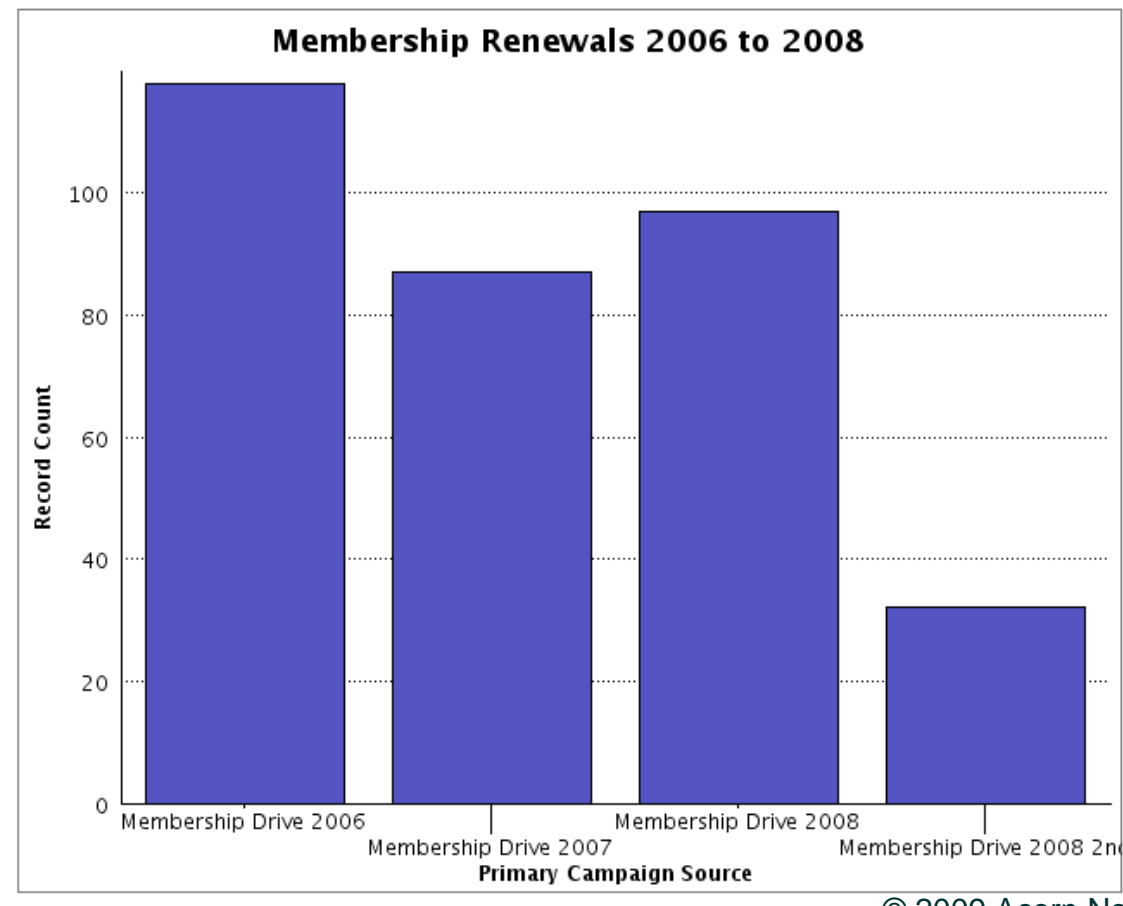
Small Steps Forward Add Up

Without CRM software, a membership follow-up mailing wasn't practical, but sending out this mailing in 2008 turned out to be very worthwhile. This initial report revealed that 2007 data was incomplete and there was little history before 2006.



Finetuned Report Shows...

After correcting the missing data and revising the report, this graph clearly shows the results: the second mailing resulted over 30 additional gifts. It is part of a more detailed report.



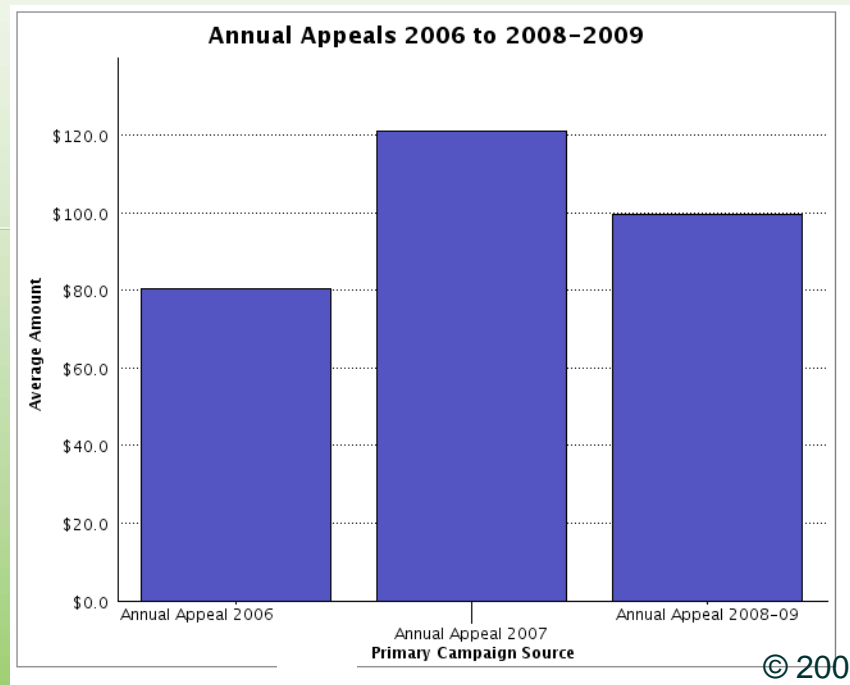
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Is a New Campaign Working ?

Before initiating an annual appeal this organization had overlooked asking its 'life' members for donations. Since the first successful appeal in 2006, it has become a significant income stream, exceeding membership revenue.

This report compares the average size of gifts to this campaign across the years. Other reports reveal the scale of this new income stream. We all know that 2008 was a tough year...

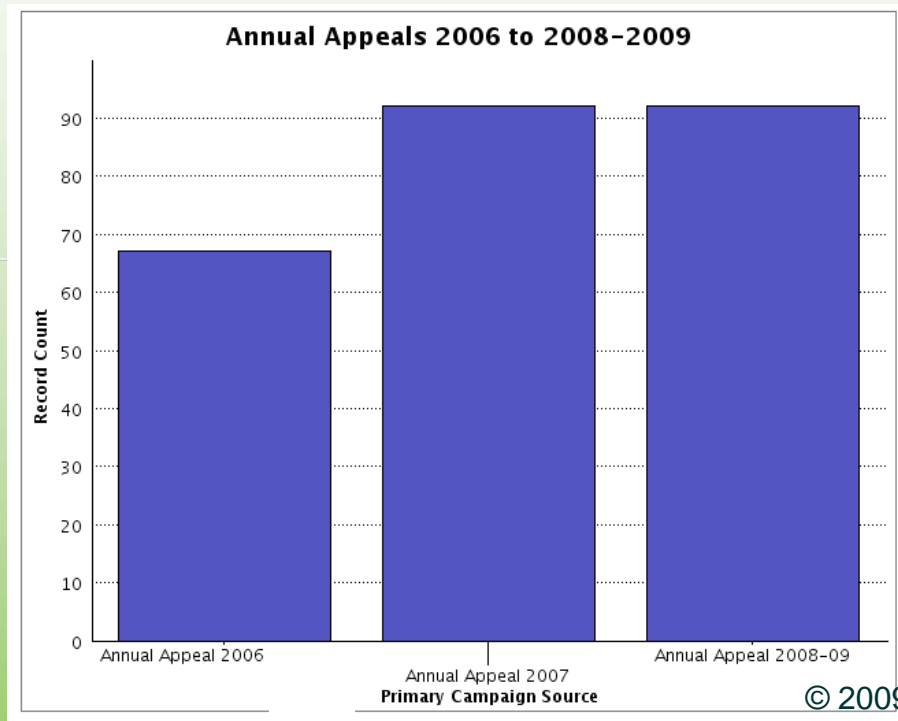


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Is a New Campaign Still Working ?

By comparing reports, the organization could see that although average giving was slightly lower in 2008, participation remained strong – a very good sign! Other reports show that this income is generated in large part from newer members who joined during a major land acquisition effort in 2006. Clearly their analysis shows that this organization has made a meaningful connection with these new donors.



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Starting Out in a New CRM Database



- ✧ Think carefully about how you will use your data-consider your current practices.
- ✧ Think carefully about the data you want to collect-consider your goals.
- ✧ Proof your data looking for errors and inconsistencies.
- ✧ Remember that as you use the database, your reporting options will increase.
- ✧ It is a good practice to reconcile your CRM totals with your accounting records.





The End Part 1

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