



**CharityEngine**<sup>®</sup>  
Powering the good to be great.

# Can Your CRM Do This?

Secrets to Explosive Fundraising

May 15, 2024

# Meet Your Speakers

## Moderator

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**Dave Martin**

Vice President of Marketing  
CharityEngine

## Guest Speakers

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**Sondra Madison**

Principal  
Madison Habib Impact Philanthropy



**Jeff Habib**

Principal  
Madison Habib Impact Philanthropy



# Madison Habib Impact Philanthropy

More than 50 years of organizational development and fundraising have positioned Sondra Madison and Jeff Habib to partner with nonprofits to uncover and address key strategic concerns. They have worked with the nation's leading nonprofits—such as Boys & Girls Clubs of America, Alzheimer's Association, Habitat for Humanity International, Wounded Warrior Project, and Feeding America—to raise hundreds of millions of dollars annually.



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# Why is CharityEngine sponsoring this webinar?

- We love to partner with industry experts
- Our goal is to create ridiculously helpful content for nonprofits



# What is CharityEngine?



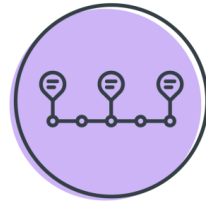
- The only fundraising platform with **real-time, unified data**
- A system of **native tools** that power multichannel campaigns
- A **trusted partner** of top charities, like Wounded Warrior Project and Easterseals
- A **100% privately owned company**



# Agenda



Five Ways Technology Holds Nonprofits Back



Where are You on the Tech-Savvy Spectrum?



Secrets to Innovation





# Five Ways Tech Holds Nonprofits Back



# 1. Tech is complex and can have a steep learning curve.



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## 2. Tech doesn't always scale as you grow your fundraising program.



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### 3. Systems that don't talk to each other can hinder understanding constituent value.



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# 4. Unrealistic budgets don't take ongoing tech costs or implementation into consideration.



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# 5. Constituent experience is impacted by tech functionality.



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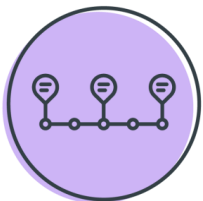
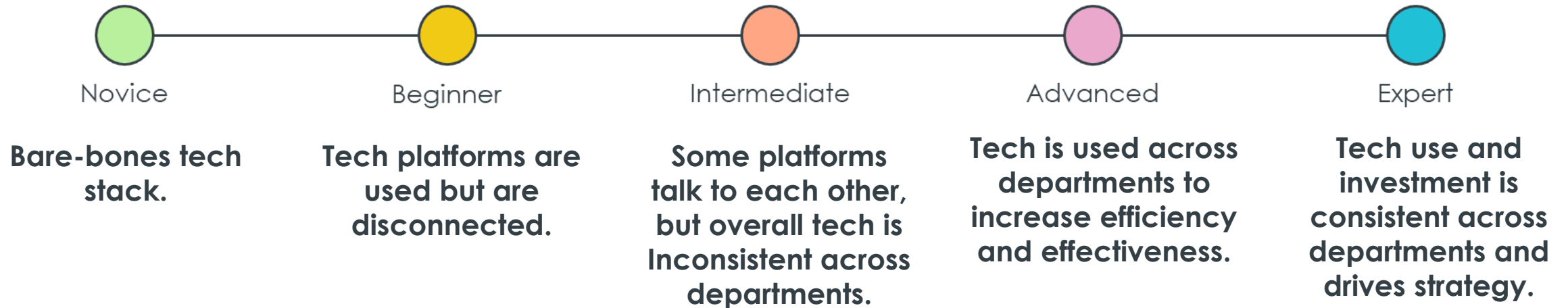




# Where are You on the Tech-Savvy Spectrum?



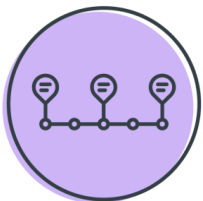
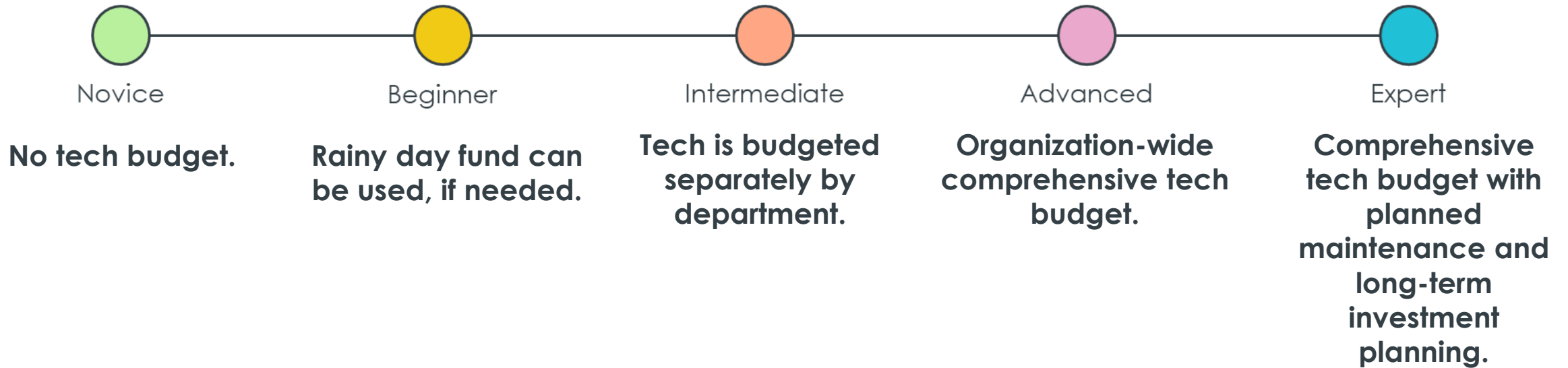
# Tech-Savvy Spectrum – Tech Culture



Where are You on the Tech-Savvy Spectrum?



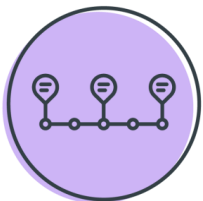
# Tech-Savvy Spectrum - Budget



Where are You on the Tech-Savvy Spectrum?



# Tech-Savvy Spectrum – Staff Resources



Where are You on the Tech-Savvy Spectrum?





# Tech-Savvy Spectrum – Fundraising



Novice

Limited database functionality. Email platforms with no segmentation capability. Revenue manually entered into finance systems.



Beginner

Transactional donor data is not in CRM but is connected to email and finance platforms.



Intermediate

Linked CRM and email platforms are used for cultivation, solicitation, and stewardship. Systems allow for basic RFM segmentation, but not much more.



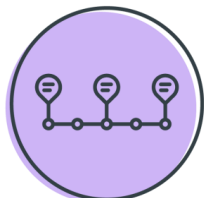
Advanced

Multichannel data is shared across platforms. Moves management is a CRM function. Robust CRM segmentation functionality.



Expert

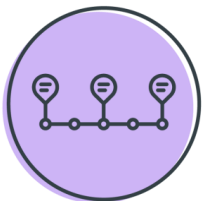
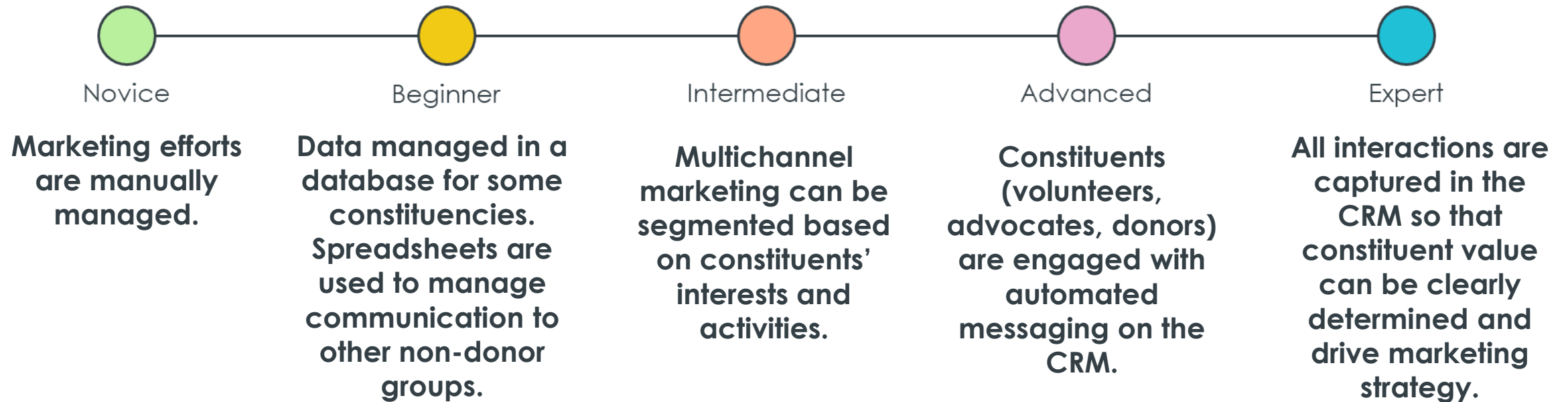
All fundraising platforms are synced. All reporting is done from the CRM. Data-based triggers drive efforts and messaging.



Where are You on the Tech-Savvy Spectrum?



# Tech-Savvy Spectrum – Marketing



Where are You on the Tech-Savvy Spectrum?





# Secrets to Innovation



# Easy Wins to Implement

- Create business rules for data management, including data fidelity.
- Understand your tech stack and address how data is shared across platforms.
- Set up CRM coding to easily track year-over-year metrics.
- Always be future focused – stay away from quick fixes.



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# Rely on One Source for Constituent Data

- Audit where your constituent data lives to understand what is inside the database and what exists externally.
- Understand what data points drive engagement now, and what you need to for future engagement.



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# Leverage Donor-First Data

- Determine the key data points needed to create personalized messaging and journeys for all types of constituents.
- Map Donor First data points to the CRM, where they can be used for segmentation in messaging.
- Build on-going opportunities to collect donor-first data into the annual fundraising/marketing calendar.



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# Think and Act Like a For Profit

- **Data is an asset**
- **Actionable, customized dashboards and reporting suite**
- **Nonprofit Sustainer Engagement = For-Profit Subscriber Management**
- **Embedded payment processing functionality is key for:**
  - **Revenue**
  - **Retention**
  - **Donor Experience**



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# Questions?

