DONOR ENGAGEMENT

Working with Fundraising Tools; A Best Practice Guide

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Meet your Trainer...

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Donor Engagement

EveryAction

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Agenda

1. Understanding the basics of fundraising engagement with the Fundraising Management Dashboard
2. Participate in an in-depth review of Fundraising Tools
3. Locate resources for Fundraising Analysis
4. Q&A

Fundraising Management Dashboard

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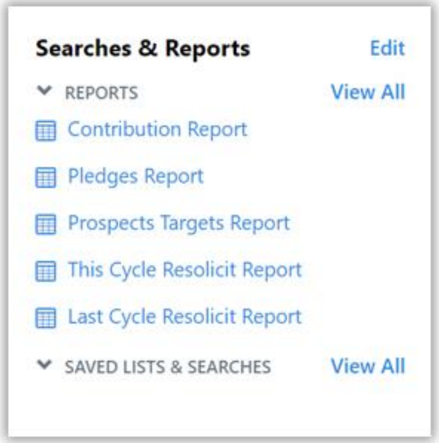
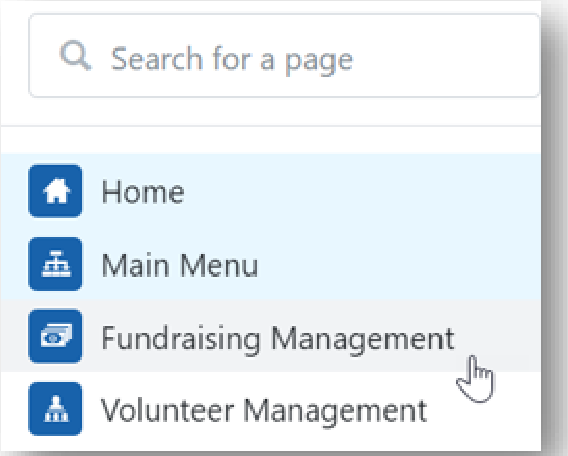
Fundraising Management Dashboard

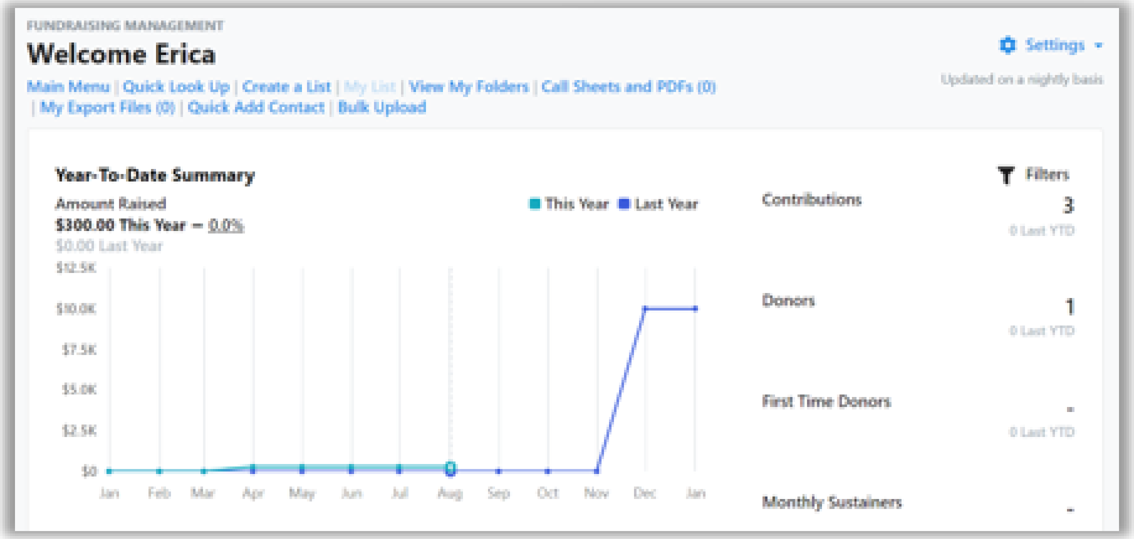
- The **Fundraising Management Dashboard** is a central hub that shows you how all of your programs are performing and gives you a one-click access to actions you should be taking today.

- You will probably already have the **Fundraising Management Dashboard** set as your default home screen, but you can also access it from the **Sidebar.**

- What you see on the dashboard will depend on which package you have, the filters you set, and which cards you select to view.







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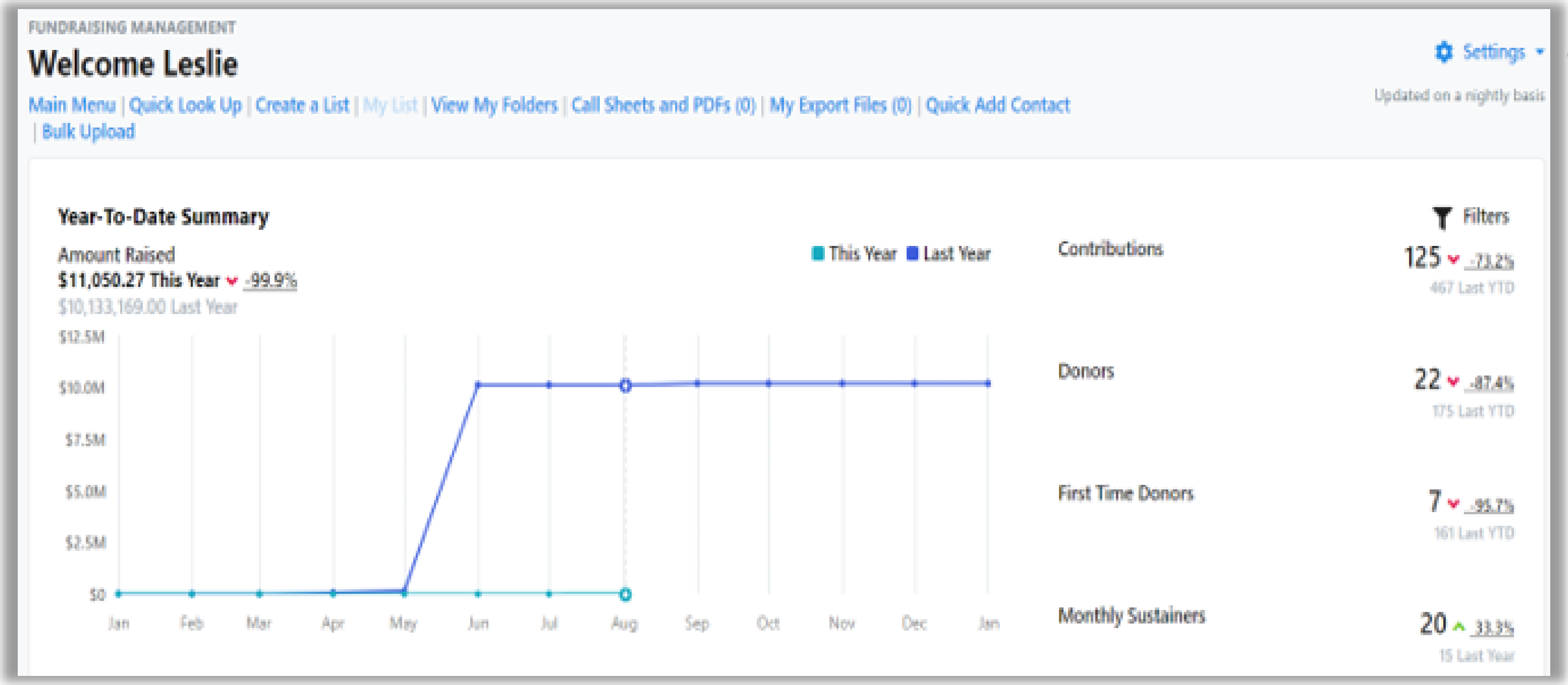
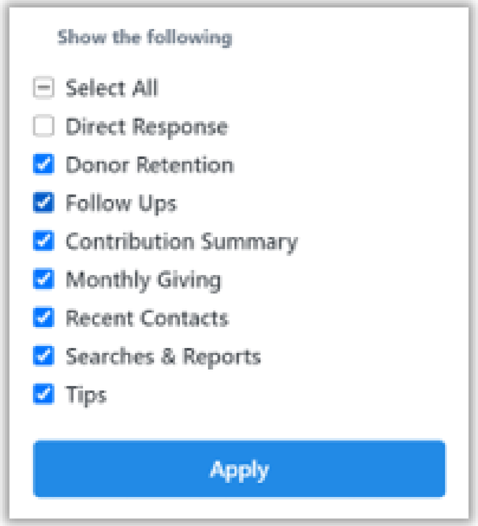
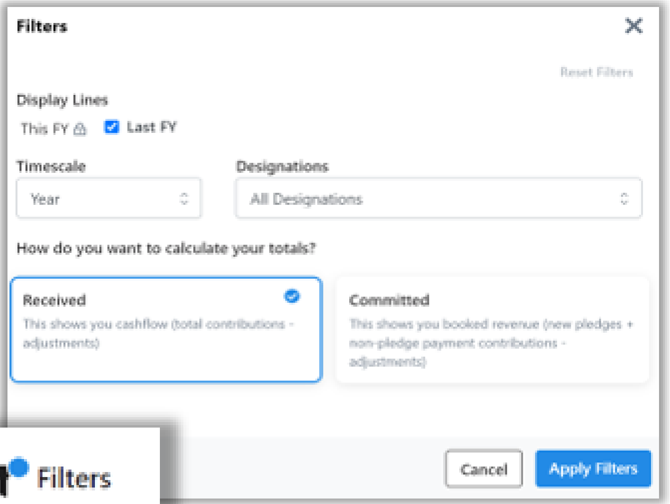
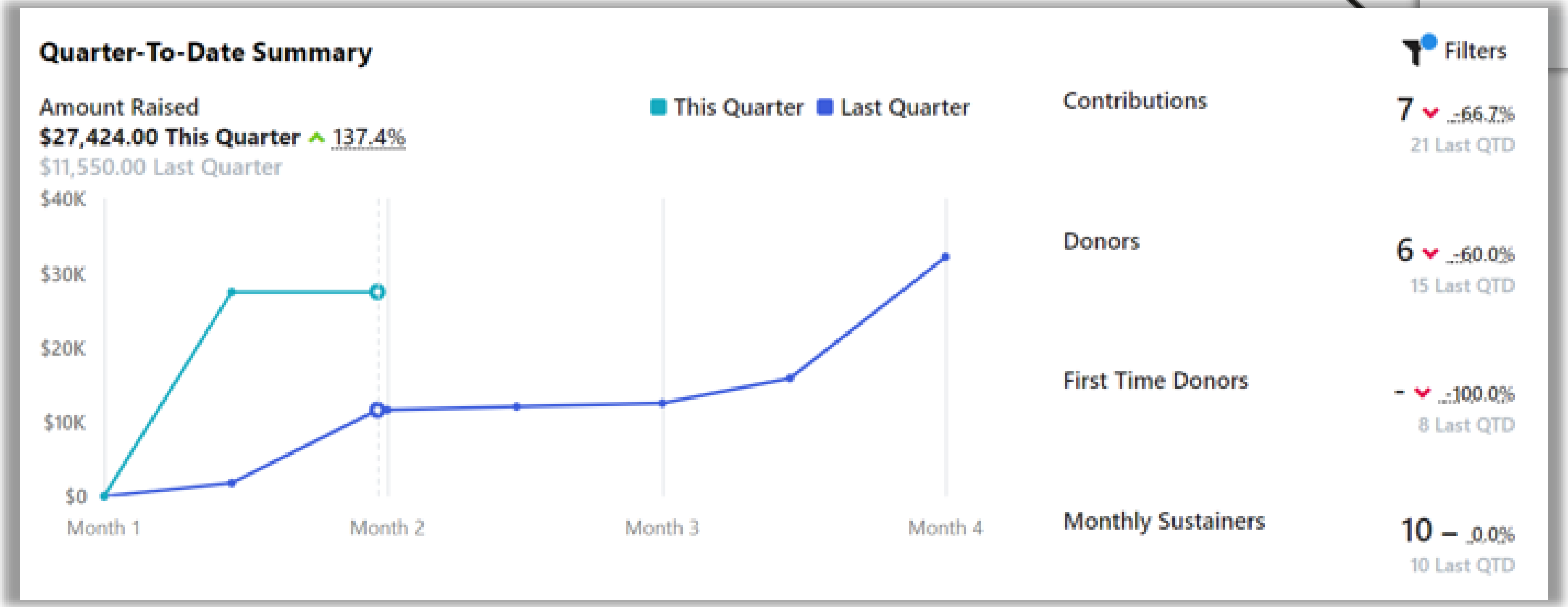
Customizing Your Dashboard





Customizing Your Summary Chart





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Fundraising Tools

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Fundraising Tools Overview

In addition to:

•**Tracking pledges**,

•**Contributions** (monetary and non-monetary donations),

•And **recurring commitments**,

you have several powerful fundraising features available to you, depending on the package(s) in your account.

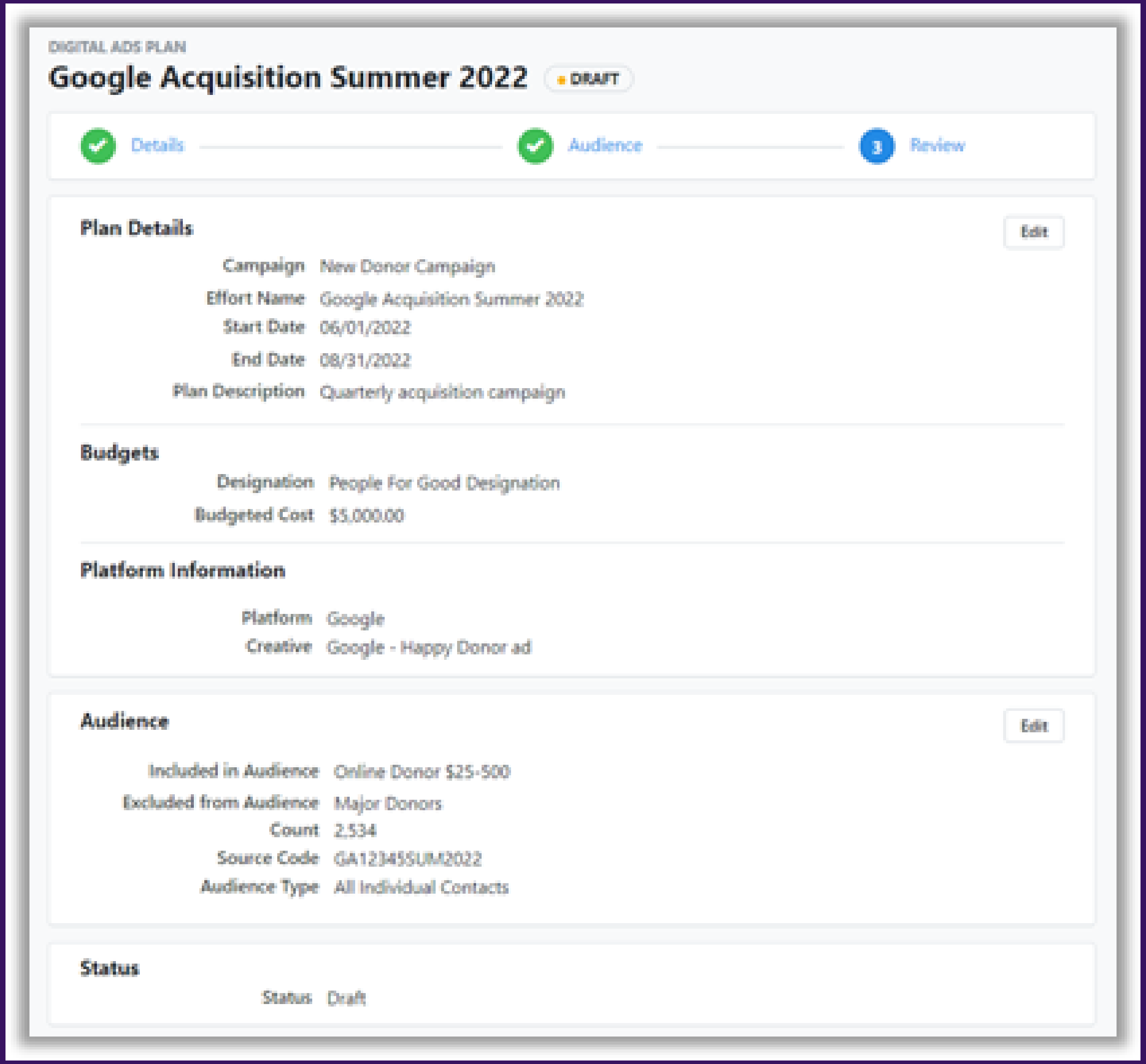
Digital Ad Plans

Digital Ad Plans is a feature that provides users with a way to track which supporters in the database were selected and targeted with a digital ad and easily push these individuals to Facebook or export for use on another platform. Users can also use the lookalike feature in Facebook's Ad Manager to acquire new supporters.

Learn more about how to use **Digital Ad Plans**:

•[How to: Set up and use Digital Ad Plans]

•[How to: Track results from Digital Ads]



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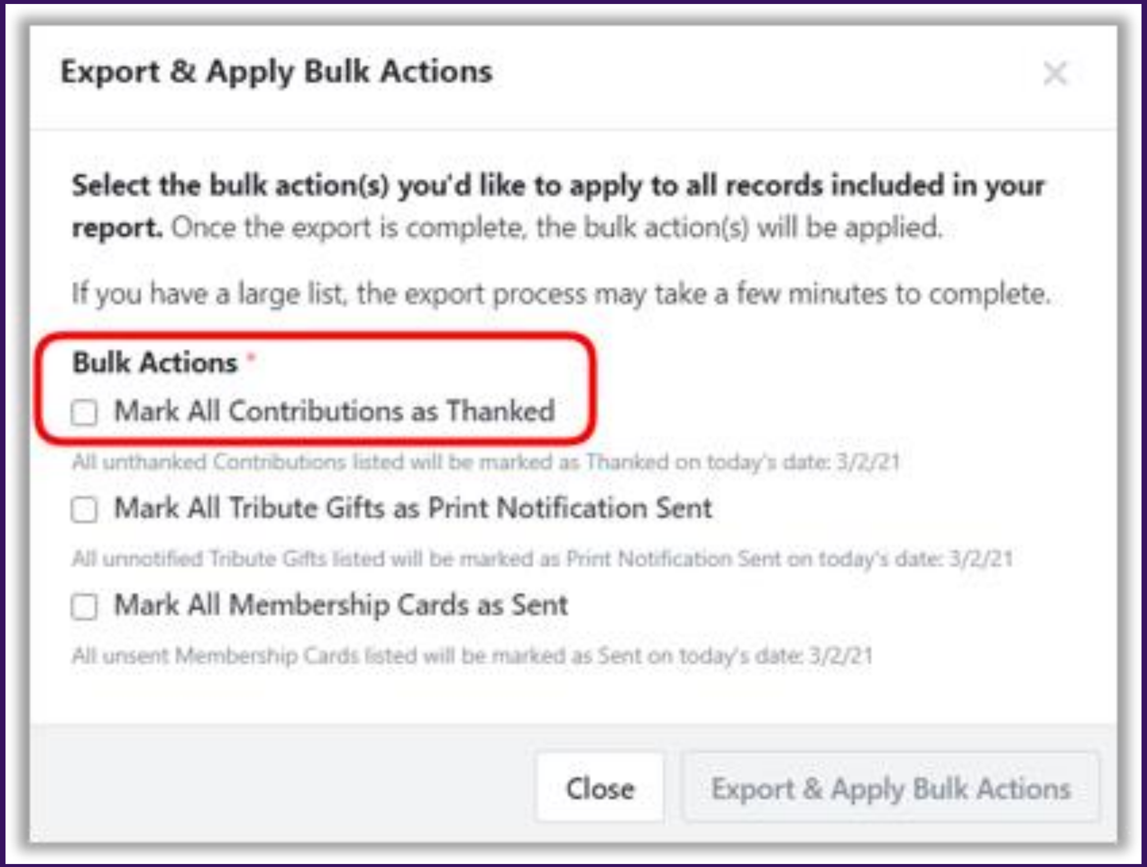
Acknowledgements

Acknowledgments allow organizations to track who has been thanked for their contribution - in other words, to manage acknowledgments. This can be indicated individually on a contribution ('mark as thanked') and can also be indicated in bulk using the
Contribution Acknowledgment Report.

Learn more about how to
use Acknowledgements:

- How to: Mark contributions as Thanked
- How to: Create Mail Merge Templates
- How to: Generate letters using Mail Merge
- How to: Add and report on contributions



Asks, or Ask Plans

Asks, or Ask Plans, provide users with a place to store their planned asks, and all necessary details including the type (contribution, event, etc), the amount (if applicable), status (scheduled or closed), date, notes, and results.

It also allows users to add Contact History when closing out an Ask, so users can easily view, search, and report on who has been contacted.

Learn more about how to use Asks:

•Best Practices: Creating dynamic contribution ask amounts

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Custom Call Sheets

Custom Call Sheets can be created from **Report Manager** by going to the PDF Reports section.

Users can:

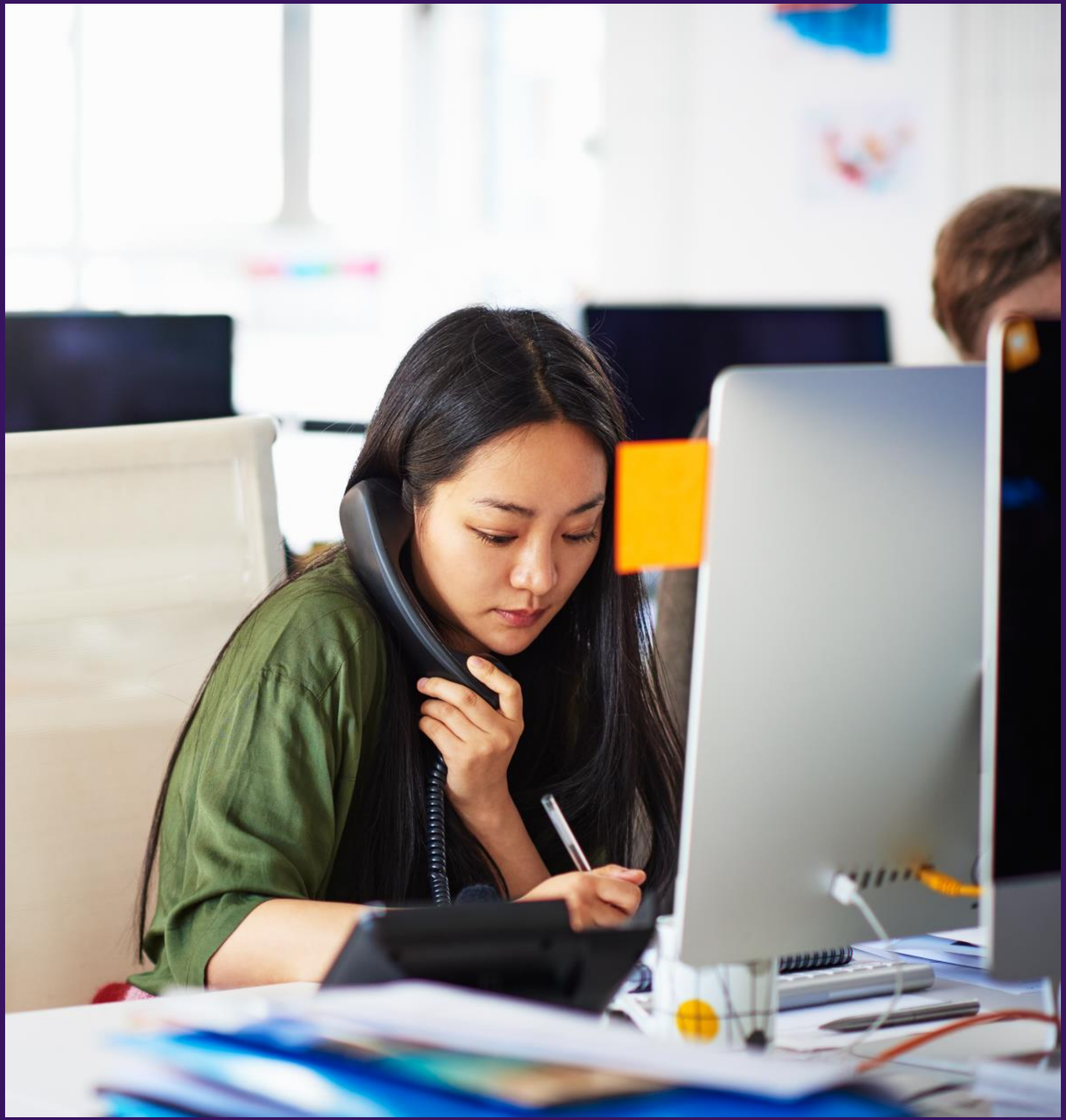
•Select what information is displayed, where, and how

•Drag and drop fields onto the call sheet

•Determine formatting and styling for each one.

Sub-reports for Contributions, Giving History, Relationships, Pledges, and more can be added to a call sheet, and users can set very specific details for each section.

Learn more about how to use Custom Call Sheets: [Video: Building and Printing Call Sheets]

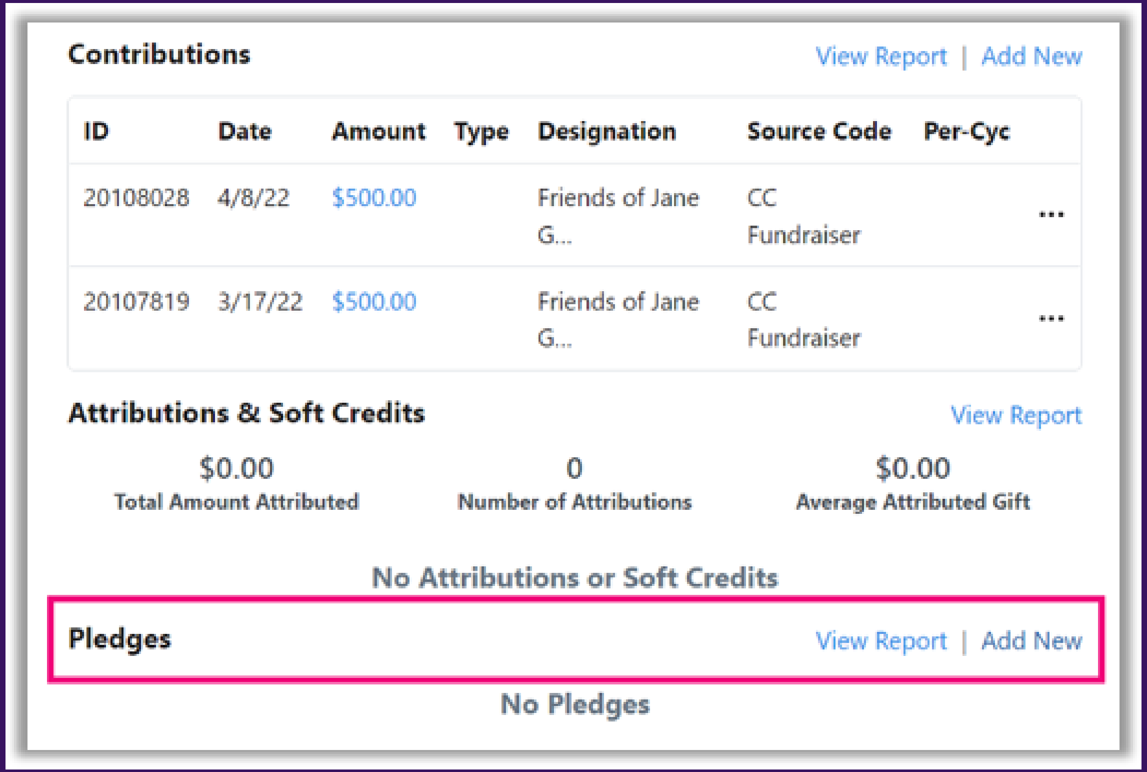


Pledges

Pledges allow organizations to manage the details of what a supporter has pledged to give, whether it's a monetary or another type of donation.

Users can also indicate commitment level (intent, promise, not specified), fulfillment (including installments) by tying contributions to a pledge, and attribution, among other things.

Learn more about how to use Pledges: [How to: Add and use Pledges]



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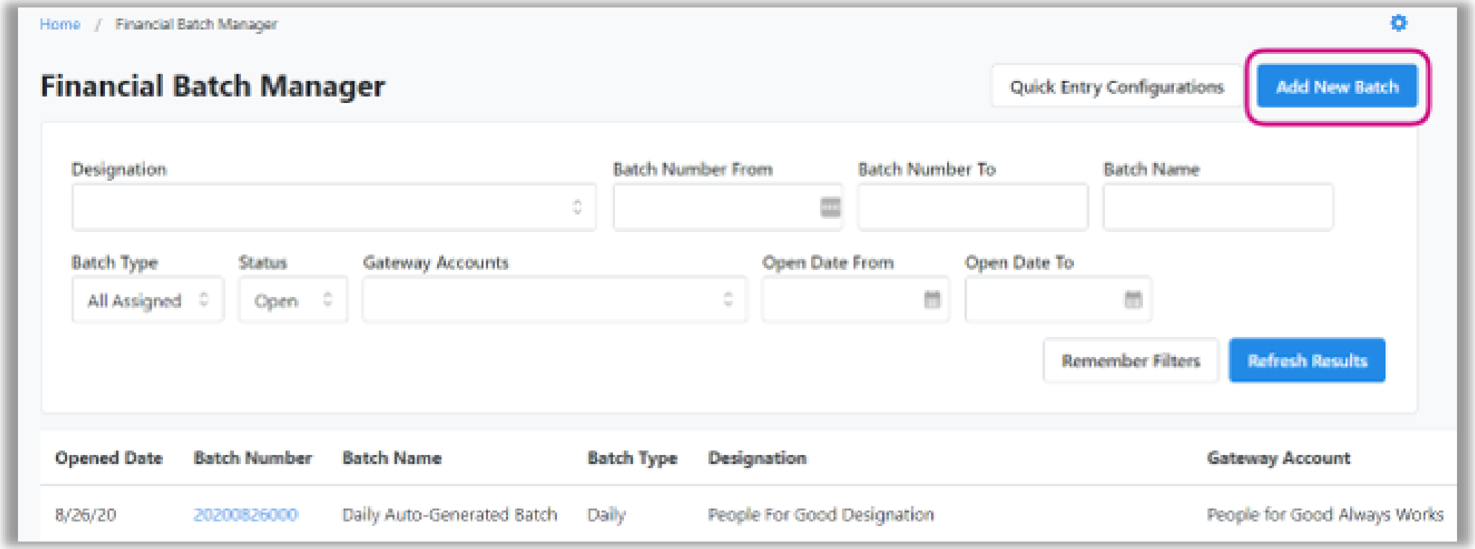
Financial Batch Manager

Financial Batch Manager is used to group Contributions to make it easy for an organization's accounting team to reconcile with their database and their bank statements.



Learn more about how to use **Financial Batch Manager:**

- How to: Create and manage batches in Financial Batch Manager
- How to: Add Contributions to Financial Batches

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Financial Households

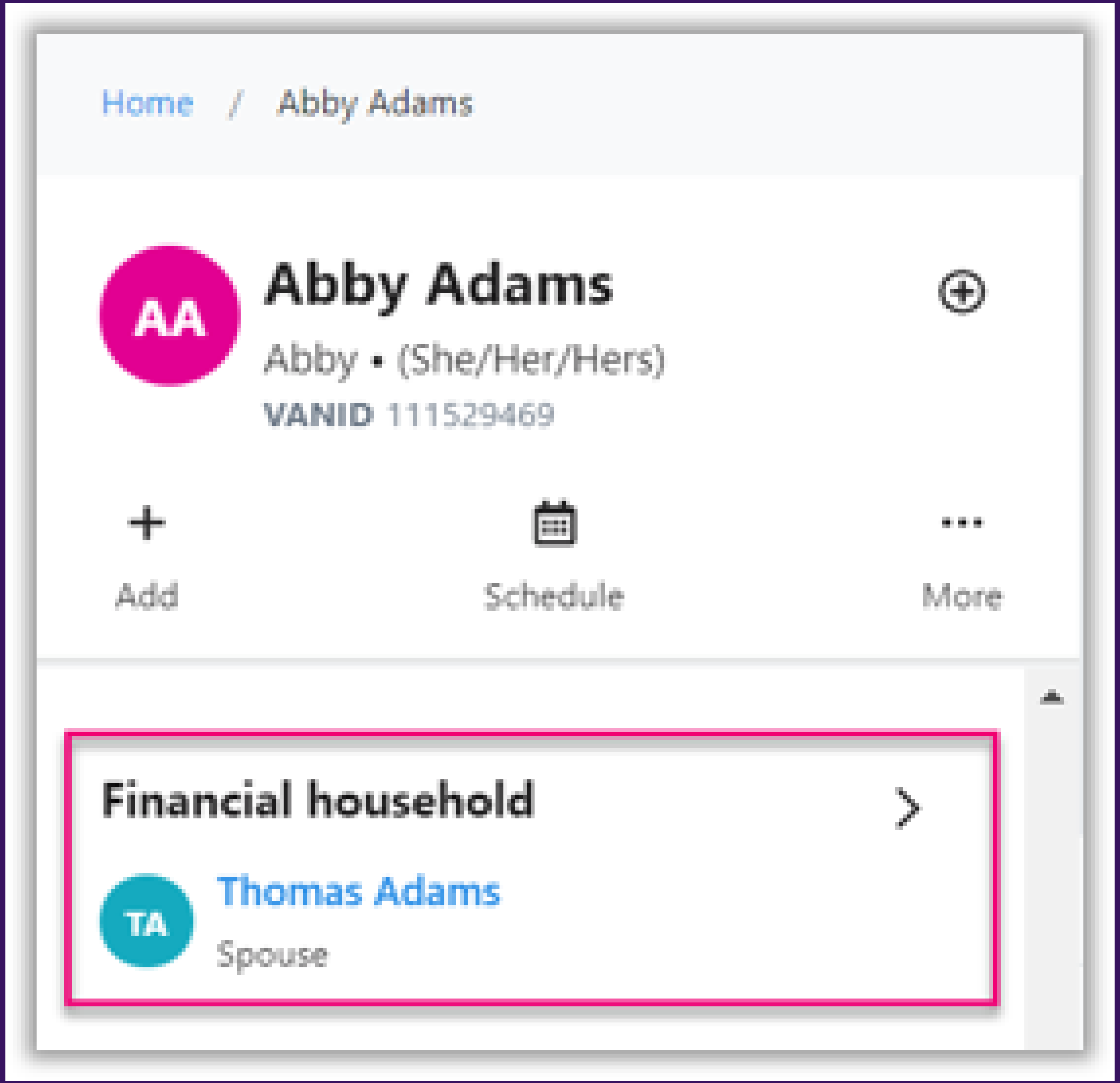
Financial Households provides a way to link two or more records that give together and therefore need to be thanked and reported on as a group.

We strongly encourage organizations to keep one contact record per individual, and contribution must be attributed to one or the other; users can then create a Financial Household, linking the records together so that they can search on how much the Financial Household has given collectively, and easily thank people accordingly.

They also allow for the customization of envelope names and salutations. Financial Households cannot be created in bulk but can be manually created.

Learn more about how to use Financial Households:

•[How to: Manage Financial Households]



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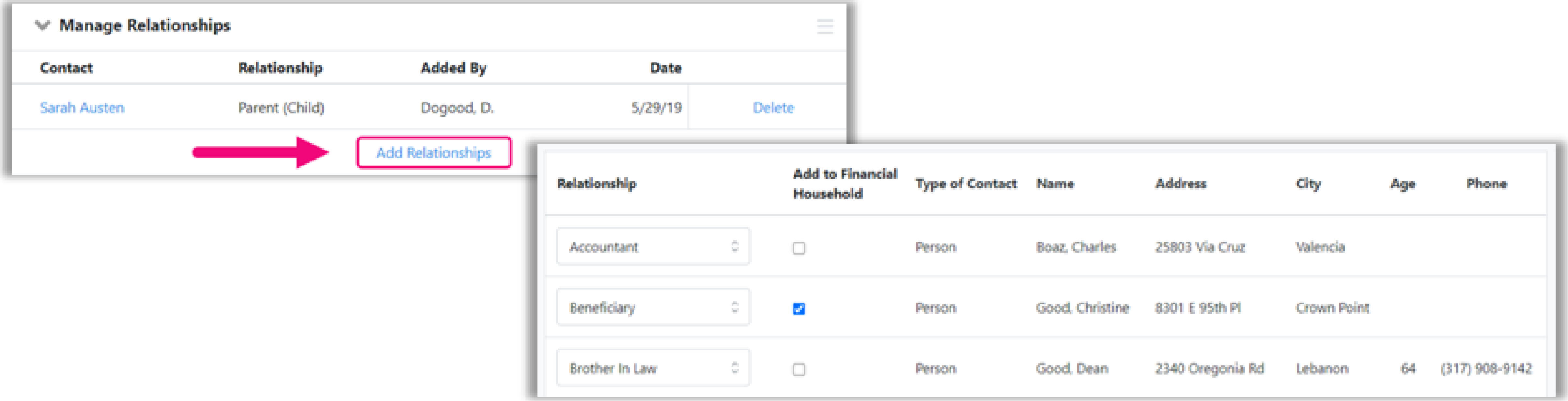
Relationships

Relationships are a different tool that allows users to link two records together and indicate their relationship to one another. However, unlike **Financial Households,** it is not used to indicate that they give together or should be acknowledged together. Users can indicate relationships between family members, coworkers, church members, and much more.

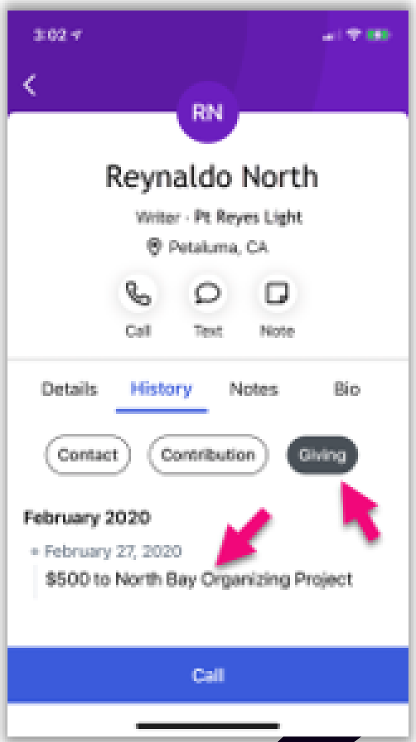
Learn more about how to use Relationships: [How to: Create and use Relationships]()

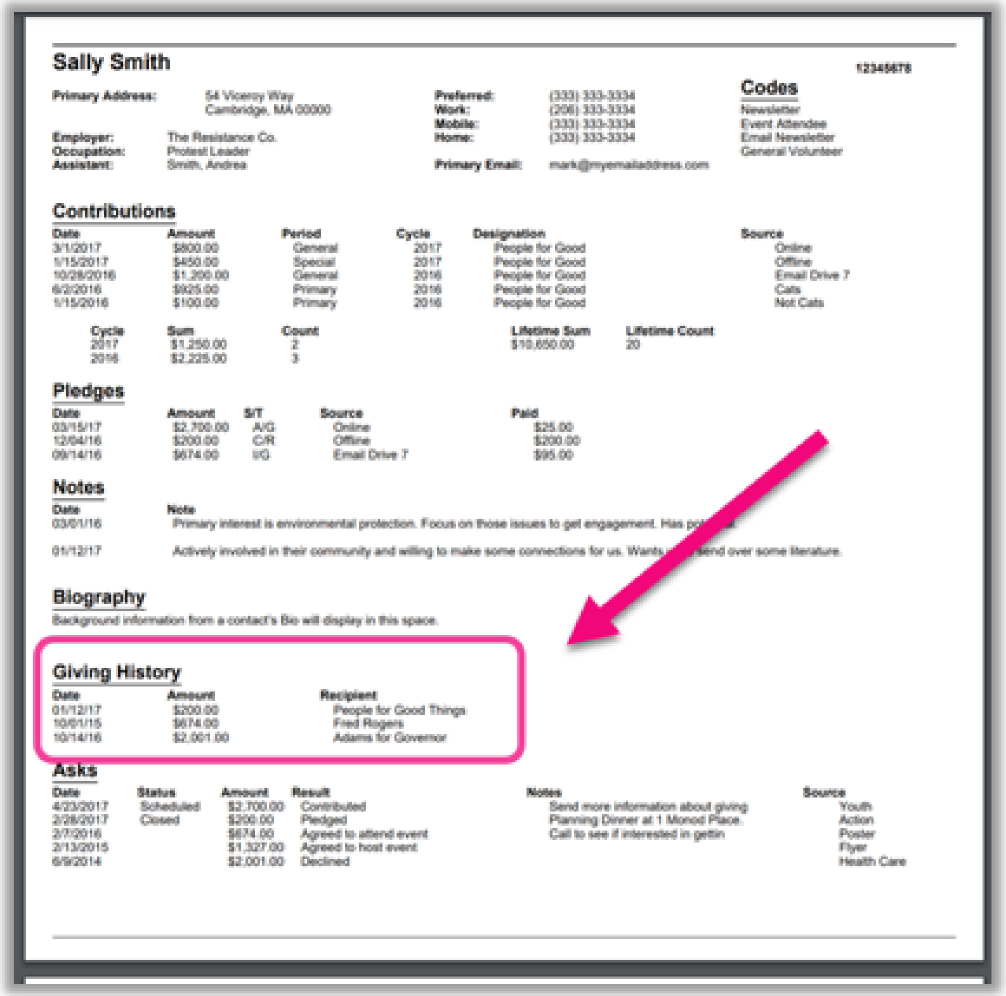


Giving History

Giving History is a place for organizations to store research about other campaigns, organizations, or causes that a person has given to.

Learn more about how to use Giving History: [How to: Add and use Giving History]()

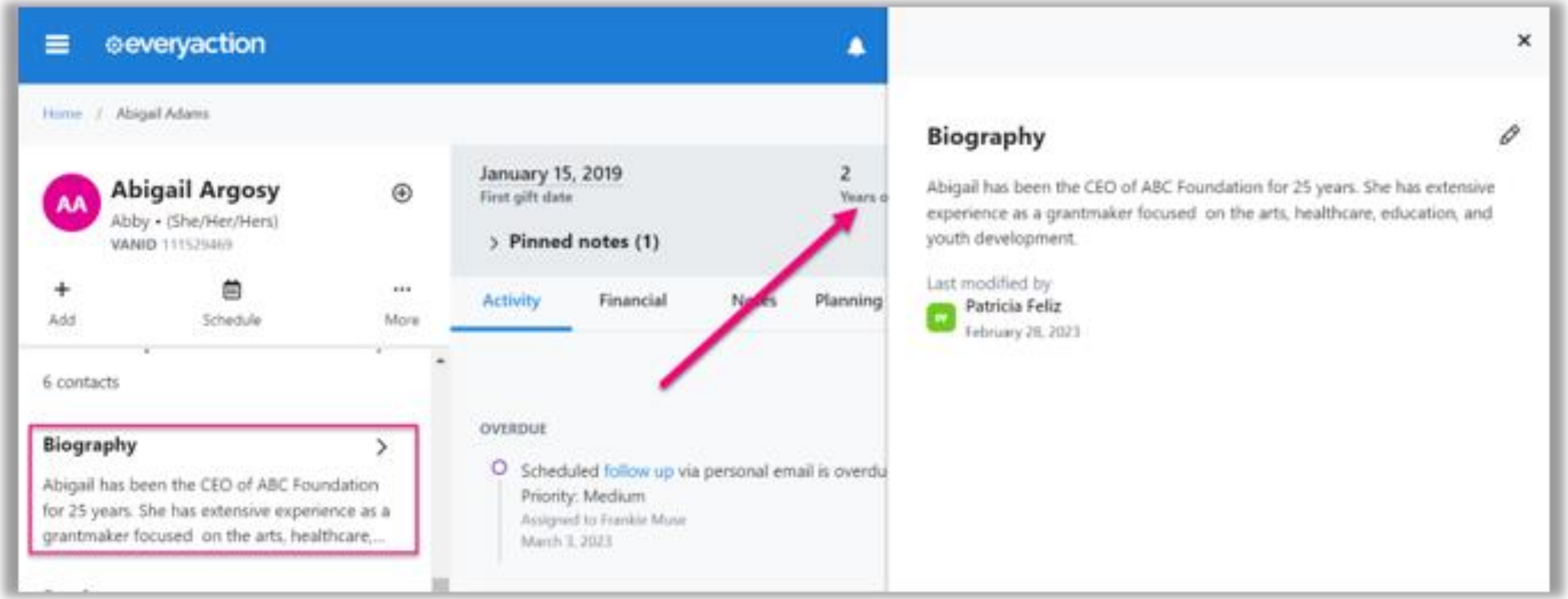




Biographies

Biographies allow users to store research about the person (usually separate from Giving History). It might include work history, interest or hobbies, or any relevant biographical information. Users can also upload images to a contact record.

Learn more about how to use Biographies: [How to: Add images and biographies on contact records]



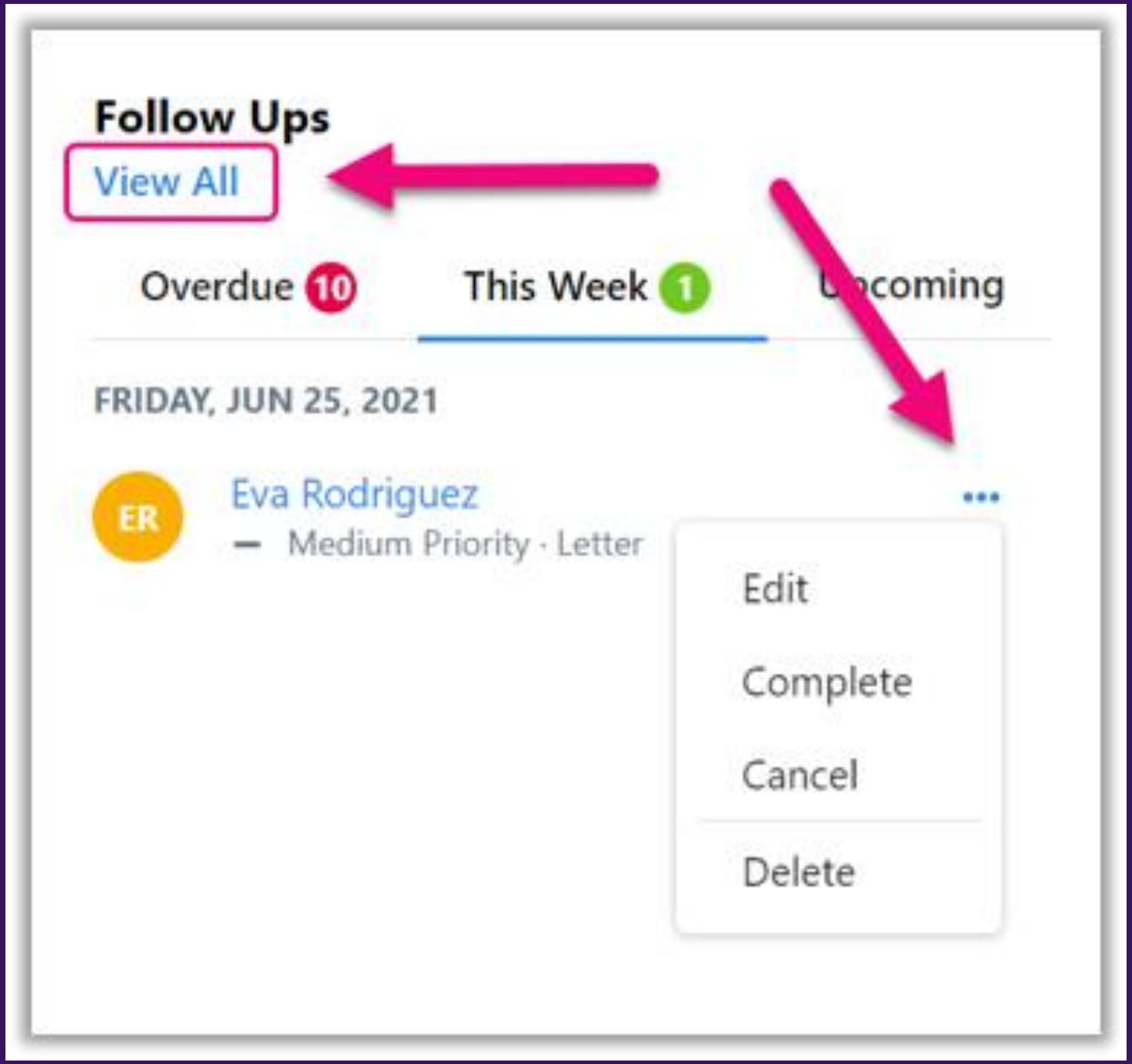
Follow Ups

Follow Ups can be used for multiple purposes and can be particularly helpful for fundraisers to keep track of which individuals they need to follow up with.

When adding a Follow Up to a contact record, users can indicate the date and method of outreach needed, as well as any relevant notes.

Follow Ups that need to be completed by a particular user can be viewed by clicking on **'My Follow Ups'** on the main menu or in the sidebar menu; this brings them to the Follow Ups Report, which can also be accessed and further filtered and edited from **Report Manager.**

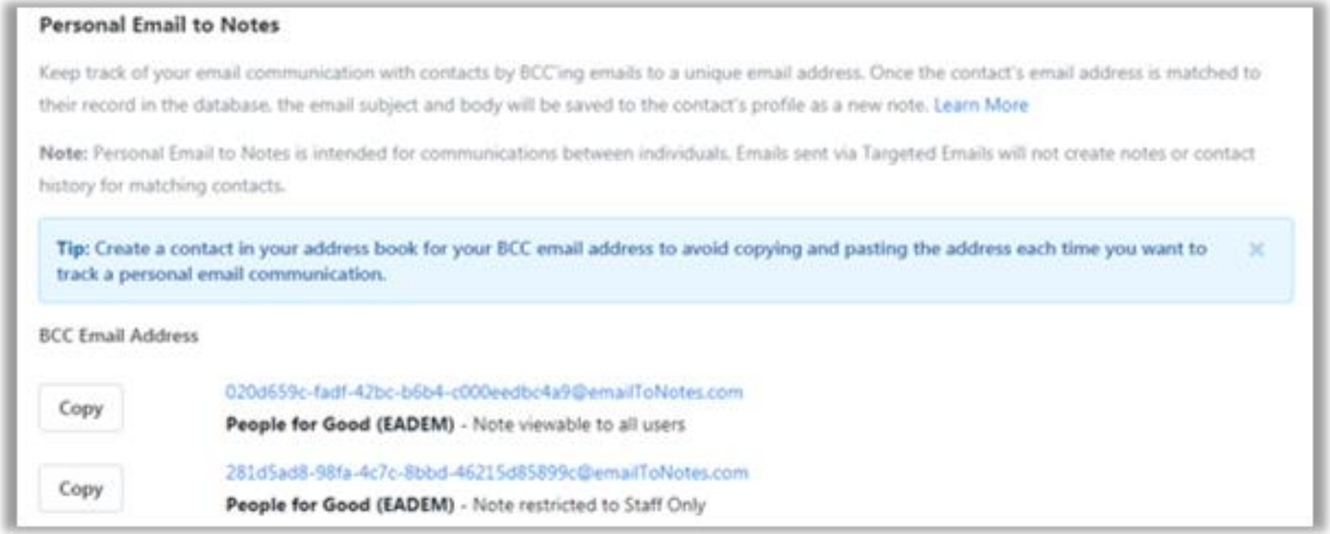
Learn more about how to use Follow Ups: [How to: Add and use contact Follow Ups]



Personal Email to Notes

Personal Email to Notes is a feature designed to simplify the process of recording the details in the database of personal emails that were sent to contacts from your Outlook, Gmail, or another personal email account.

With this feature, you can automatically record the details of an email that you send to a supporter by BCCing a unique email address that is linked to their record in their database by creating a **Note** and **Contact History** on their contact record.



Learn more about how to use Personal Email to Notes: [How to: Use Personal Email to Notes]

Fundraising Analysis

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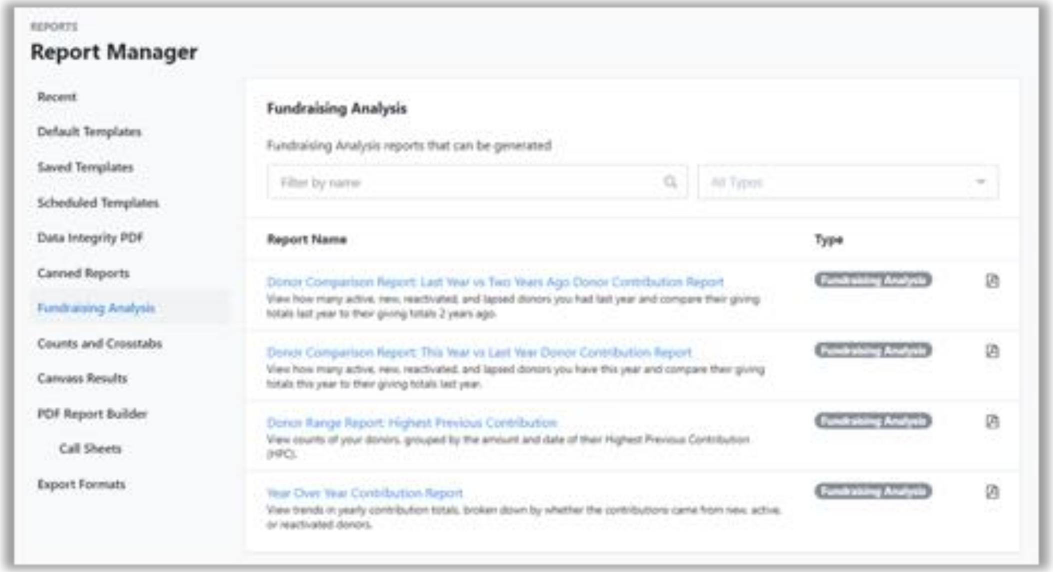
Using Fundraising Analysis Reports to Improve Outcomes

The data you've collected on your donors is a valuable tool to improve your fundraising outcomes. Our **Donor Comparison Reports** help you:

- Compare fundraising performance by calendar or fiscal year for the last 10 years.
- Track how many donors lapsed, reactivated, upgraded or downgraded from year to year.
- Review average gift sizes by donor type or fundraising source.
- View total donor tallies by the amount and date of their **Highest Previous Contribution**

Learn more about how to use the Fundraising Analysis Report: [Fundraising Analysis Reports]



DonorTrends

DonorTrends is a predictive analysis tool that helps you raise more money by using artificial intelligence to rank your donors on their likelihood to respond to specific Asks in five areas:

Yearly Donor Retention/Renewal → Yearly Donor Upgrading → Sustainer Conversion and Upgrading → Lapsed Donor Reactivation → Planned Giver Identification

- The models help you hone strategic engagement with your donor file and can be used to: craft segmentation to support differentiated treatment for your donors within major online and offline campaigns.
- identify the best targets for time and/or cost limited cultivation and solicitation
- uncover groups for experiments with churn intervention strategies

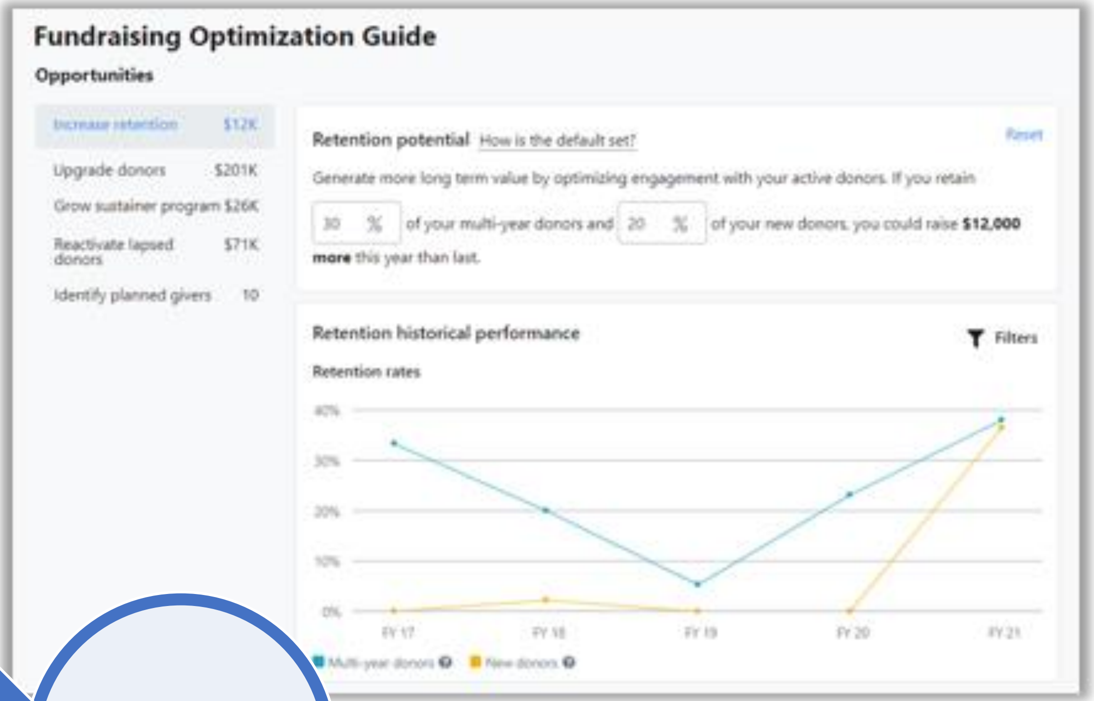
Learn more about how to use **DonorTrends:**

•Overview: DonorTrends

•How to: Use DonorTrends to find better prospects

Fundraising Optimization Guide

The **Fundraising Optimization Guide** is designed to help you understand your active donor file by using key fundraising metrics to track your historical performance and predict future growth.



If you also have **DonorTrends** predictive analytics, you will get straightforward action steps for optimizing your performance.

Increase Retention → Upgrade Donors → Grow Your Sustainer Program → Reactivate lapsed donors → Identify planned givers

Learn more about Fundraising Optimization Guide:
[How to: Raise more with the Fundraising Optimization Guide]

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Q&A

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Additional Resources

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Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

Help Center Resources

- Overview: Fundraising Management dashboard in EveryAction
- Video: Fundraising Management Dashboard (EveryAction)
- Overview: Political Fundraising Tools
- Training Webinar: High Touch Fundraising and Grants
- Training Webinar: Measuring Fundraising Success
- How to: Use DonorTrends to find better prospects
- Best Practices: Using Fundraising Analysis Reports to improve outcomes

Additional Training

- Bonterra Academy: [Bonterra Academy Self Signup]
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

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Feedback & Training Survey

- Please fill out our 1-minute survey that appears after the webinar.
- Access the survey here: Training Feedback Survey

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Thank You for Attending!

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