

DONOR ENGAGEMENT

Working with Fundraising Tools; A Best Practice Guide



Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



Agenda

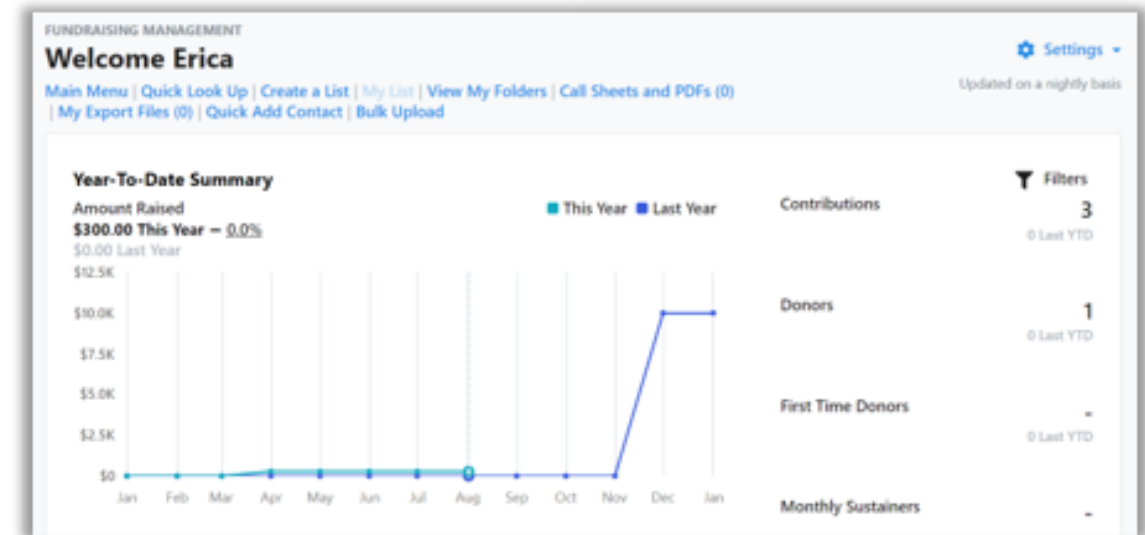
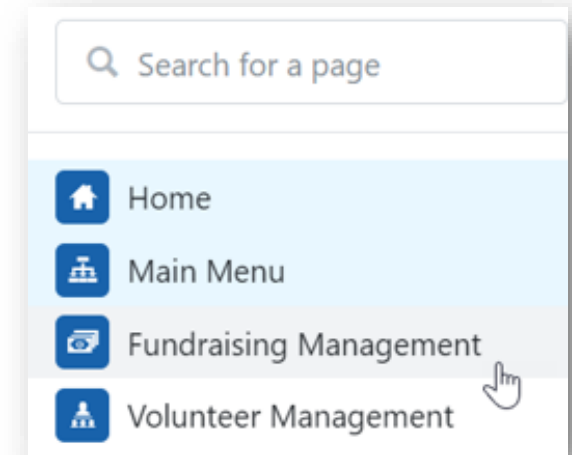
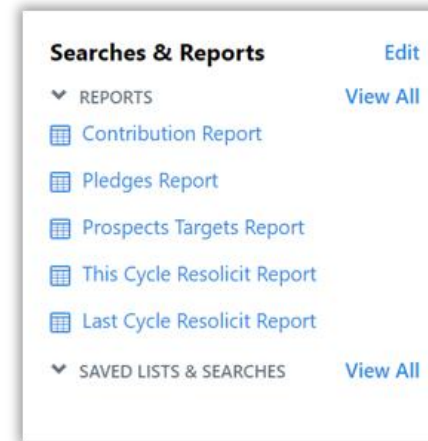
1. Understanding the basics of fundraising engagement with the Fundraising Management Dashboard
2. Participate in an in-depth review of Fundraising Tools
3. Locate resources for Fundraising Analysis
4. Q&A



Fundraising Management Dashboard

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.



Customizing Your Dashboard

The screenshot shows a fundraising management dashboard for a user named Leslie. The dashboard includes a navigation menu, a year-to-date summary with a line chart, and several key performance indicators (KPIs) for Contributions, Donors, First Time Donors, and Monthly Sustainers. A settings menu is open on the right side, showing a list of items to be displayed on the dashboard.

FUNDRAISING MANAGEMENT
Welcome Leslie Settings
Updated on a nightly basis

Main Menu | Quick Look Up | Create a List | My List | View My Folders | Call Sheets and PDFs (0) | My Export Files (0) | Quick Add Contact | Bulk Upload

Year-To-Date Summary
Amount Raised
\$11,050.27 This Year ▼ **-99.9%**
\$10,133,169.00 Last Year

■ This Year ■ Last Year

Contributions **125** ▼ **-73.2%**
467 Last YTD

Donors **22** ▼ **-87.4%**
175 Last YTD

First Time Donors **7** ▼ **-95.7%**
161 Last YTD

Monthly Sustainers **20** ▲ **33.3%**
15 Last Year

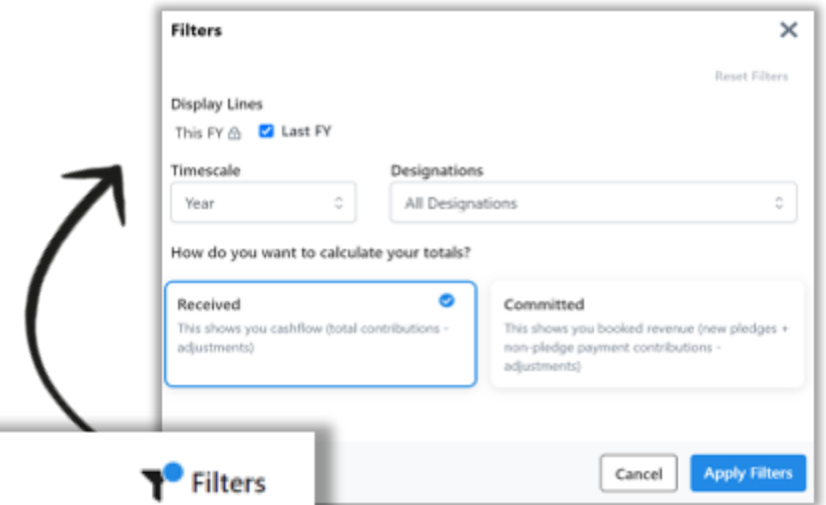
Filters

Show the following

- Select All
- Direct Response
- Donor Retention
- Follow Ups
- Contribution Summary
- Monthly Giving
- Recent Contacts
- Searches & Reports
- Tips

Apply

Customizing Your Summary Chart



Filters Reset Filters

Display Lines
This FY Last FY

Timescale: Year

Designations: All Designations

How do you want to calculate your totals?

Received
This shows you cashflow (total contributions - adjustments)

Committed
This shows you booked revenue (new pledges + non-pledge payment contributions - adjustments)



Fundraising Tools

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](#)

The screenshot displays the 'DIGITAL ADS PLAN' interface for 'Google Acquisition Summer 2022', which is currently in 'DRAFT' status. The interface is divided into three main sections: 'Details', 'Audience', and 'Review', each with a progress indicator. The 'Details' section includes 'Plan Details' (Campaign: New Donor Campaign, Effort Name: Google Acquisition Summer 2022, Start Date: 06/01/2022, End Date: 08/31/2022, Plan Description: Quarterly acquisition campaign), 'Budgets' (Designation: People For Good Designation, Budgeted Cost: \$5,000.00), and 'Platform Information' (Platform: Google, Creative: Google - Happy Donor ad). The 'Audience' section shows 'Included in Audience: Online Donor \$25-500', 'Excluded from Audience: Major Donors', 'Count: 2,534', 'Source Code: GA12345SUM2022', and 'Audience Type: All Individual Contacts'. The 'Status' section indicates the plan is in 'Draft' status.

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](#)

Export & Apply Bulk Actions

Select the bulk action(s) you'd like to apply to all records included in your report. Once the export is complete, the bulk action(s) will be applied.

If you have a large list, the export process may take a few minutes to complete.

Bulk Actions *

- Mark All Contributions as Thanked
All unthanked Contributions listed will be marked as Thanked on today's date: 3/2/21
- Mark All Tribute Gifts as Print Notification Sent
All unnotified Tribute Gifts listed will be marked as Print Notification Sent on today's date: 3/2/21
- Mark All Membership Cards as Sent
All unsent Membership Cards listed will be marked as Sent on today's date: 3/2/21

Close Export & Apply Bulk Actions

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](#)



Custom Call Sheets

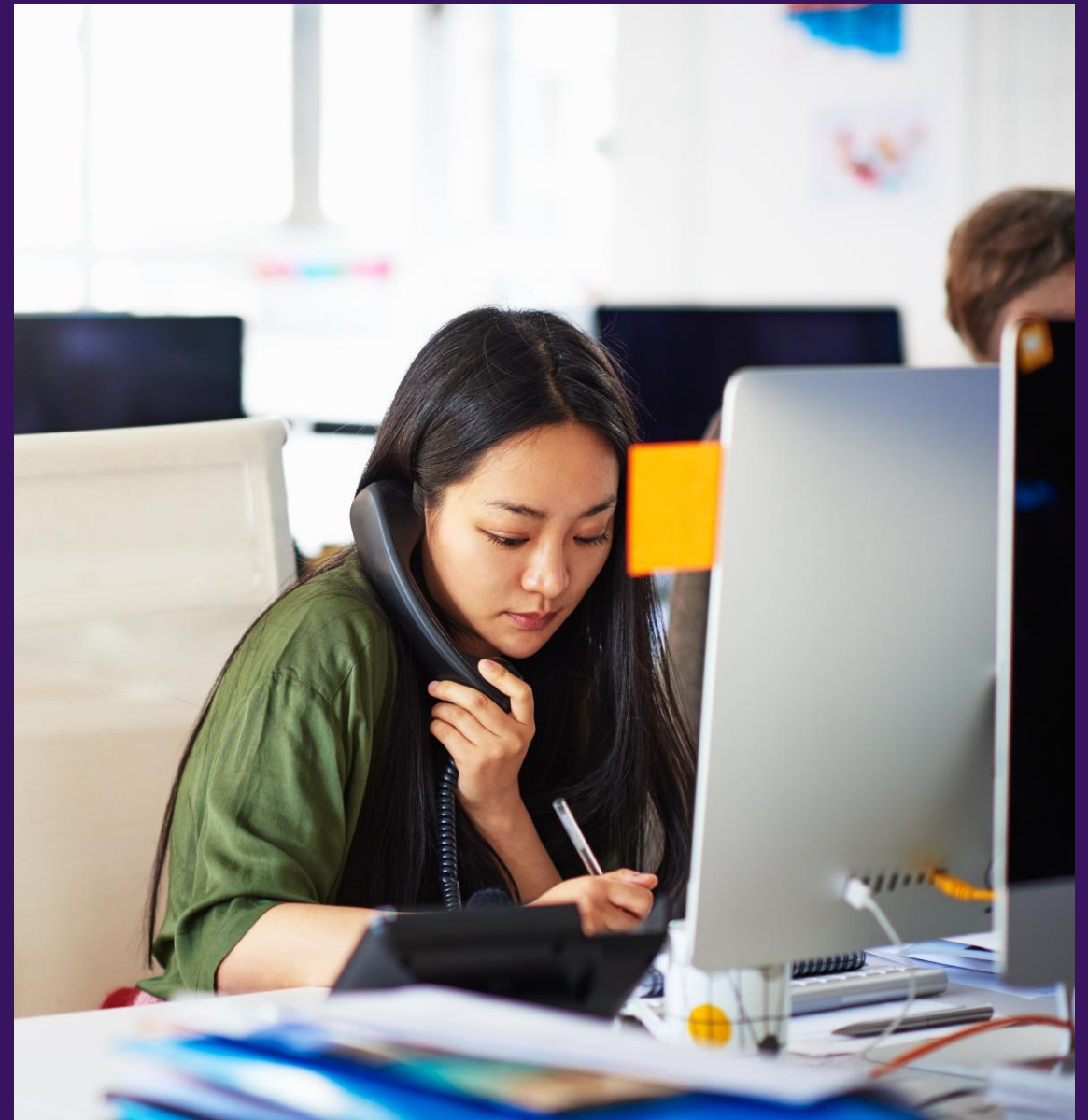
Custom Call Sheets can be created from **Report Manager** by going to the PDF Reports section.

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](#)

The screenshot displays a software interface with three main sections:

- Contributions**: A table with columns for ID, Date, Amount, Type, Designation, Source Code, and Per-Cyc. It contains two rows of data for contributions of \$500.00.
- Attributions & Soft Credits**: A summary section showing \$0.00 Total Amount Attributed, 0 Number of Attributions, and \$0.00 Average Attributed Gift.
- Pledges**: A section currently showing "No Pledges".

ID	Date	Amount	Type	Designation	Source Code	Per-Cyc
20108028	4/8/22	\$500.00		Friends of Jane G...	CC Fundraiser	...
20107819	3/17/22	\$500.00		Friends of Jane G...	CC Fundraiser	...

Attributions & Soft Credits

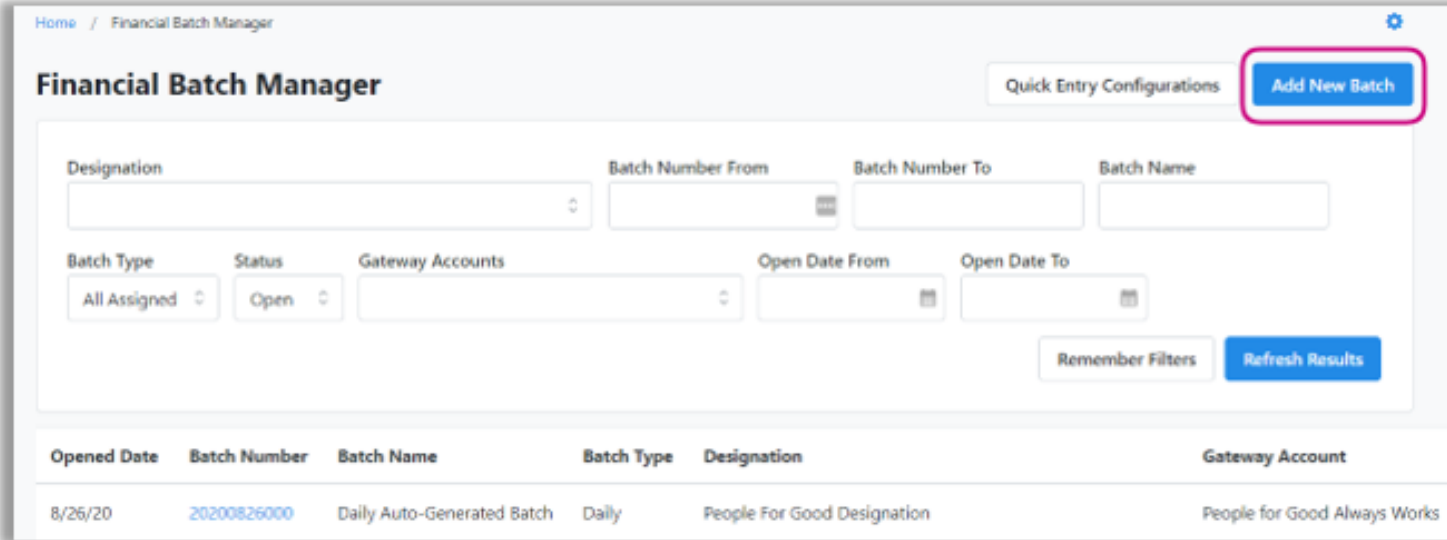
\$0.00	0	\$0.00
Total Amount Attributed	Number of Attributions	Average Attributed Gift

Pledges

No Pledges

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.



The screenshot displays the 'Financial Batch Manager' interface. At the top, there is a breadcrumb 'Home / Financial Batch Manager' and a settings gear icon. The main title 'Financial Batch Manager' is on the left, and 'Quick Entry Configurations' and 'Add New Batch' (highlighted with a red box) are on the right. Below the title are several filter fields: 'Designation' (dropdown), 'Batch Number From' (text with calendar icon), 'Batch Number To' (text with calendar icon), 'Batch Name' (text), 'Batch Type' (dropdown with 'All Assigned' selected), 'Status' (dropdown with 'Open' selected), 'Gateway Accounts' (text with dropdown arrow), 'Open Date From' (text with calendar icon), and 'Open Date To' (text with calendar icon). At the bottom of the filter section are 'Remember Filters' and 'Refresh Results' buttons. Below the filters is a table with the following data:

Opened Date	Batch Number	Batch Name	Batch Type	Designation	Gateway Account
8/26/20	20200826000	Daily Auto-Generated Batch	Daily	People For Good Designation	People for Good Always Works

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](#)

Financial Households

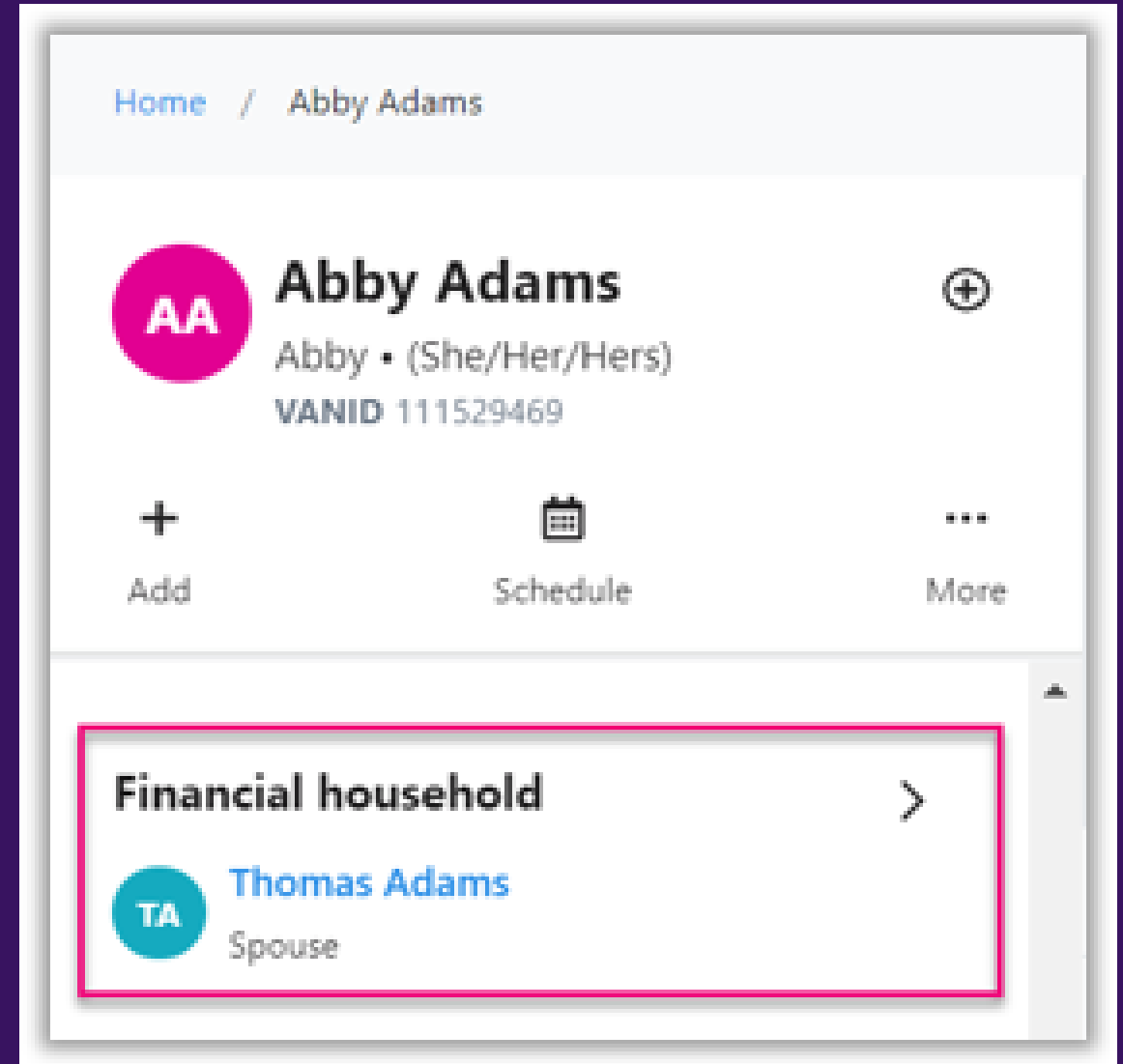
Financial Households provides a way to link two or more records that give together and therefore need to be thanked and reported on as a group.

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](#)



The screenshot shows a user profile for Abby Adams. At the top, there is a breadcrumb trail: "Home / Abby Adams". Below this is a profile card for Abby Adams, featuring a pink circular avatar with the initials "AA". To the right of the avatar is a plus sign icon. The profile card displays the name "Abby Adams", the name "Abby • (She/Her/Hers)", and the VANID "111529469". Below the profile card are three action buttons: "Add" with a plus sign icon, "Schedule" with a calendar icon, and "More" with a three-dot icon. Below the profile card is a section titled "Financial household" with a right-pointing chevron icon. This section contains a card for "Thomas Adams", with a teal circular avatar containing the initials "TA" and the role "Spouse". The "Financial household" section is highlighted with a pink rectangular border.

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](#)

The screenshot displays the 'Manage Relationships' interface. At the top, there is a table with the following data:

Contact	Relationship	Added By	Date	
Sarah Austen	Parent (Child)	Dogood, D.	5/29/19	Delete

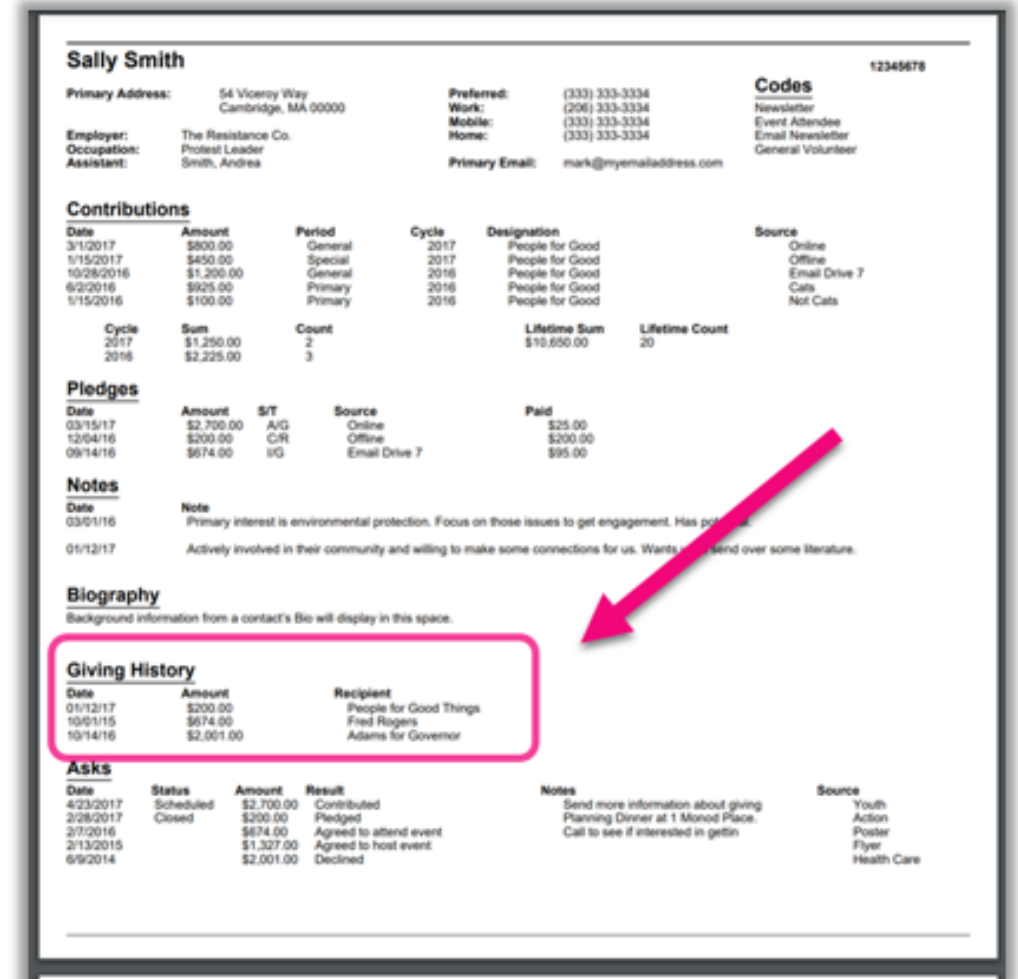
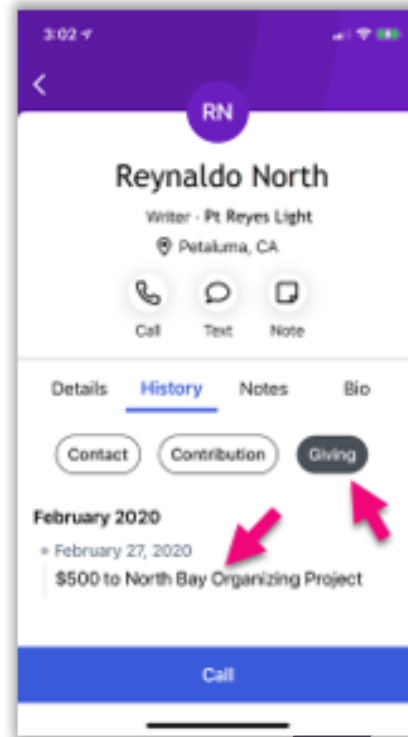
A pink arrow points from the 'Add Relationships' button below the table to a modal window. The modal window contains a table for adding new relationships:

Relationship		Add to Financial Household	Type of Contact	Name	Address	City	Age	Phone
Accountant	⊖	<input type="checkbox"/>	Person	Boaz, Charles	25803 Via Cruz	Valencia		
Beneficiary	⊖	<input checked="" type="checkbox"/>	Person	Good, Christine	8301 E 95th Pl	Crown Point		
Brother In Law	⊖	<input type="checkbox"/>	Person	Good, Dean	2340 Oregonia Rd	Lebanon	64	(317) 908-9142

Giving History

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

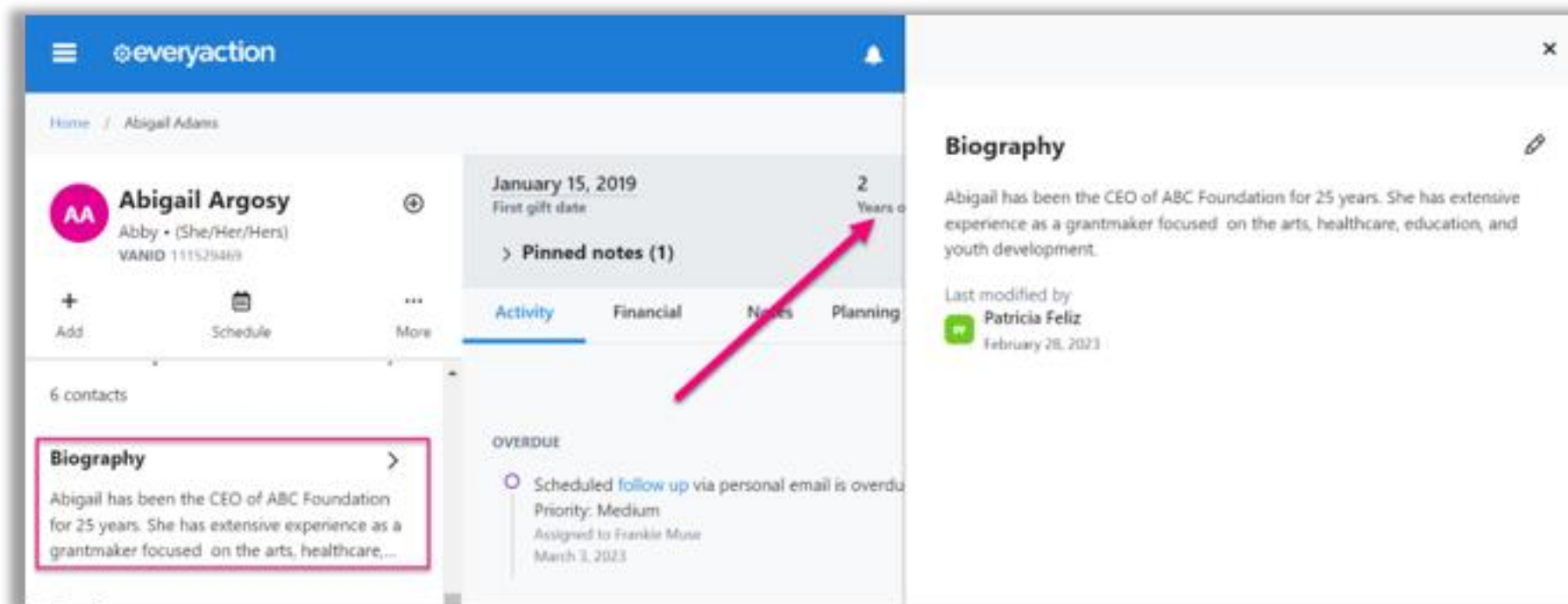
Learn more about how to use Giving History: [How to: Add and use Giving History](#)



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](#)



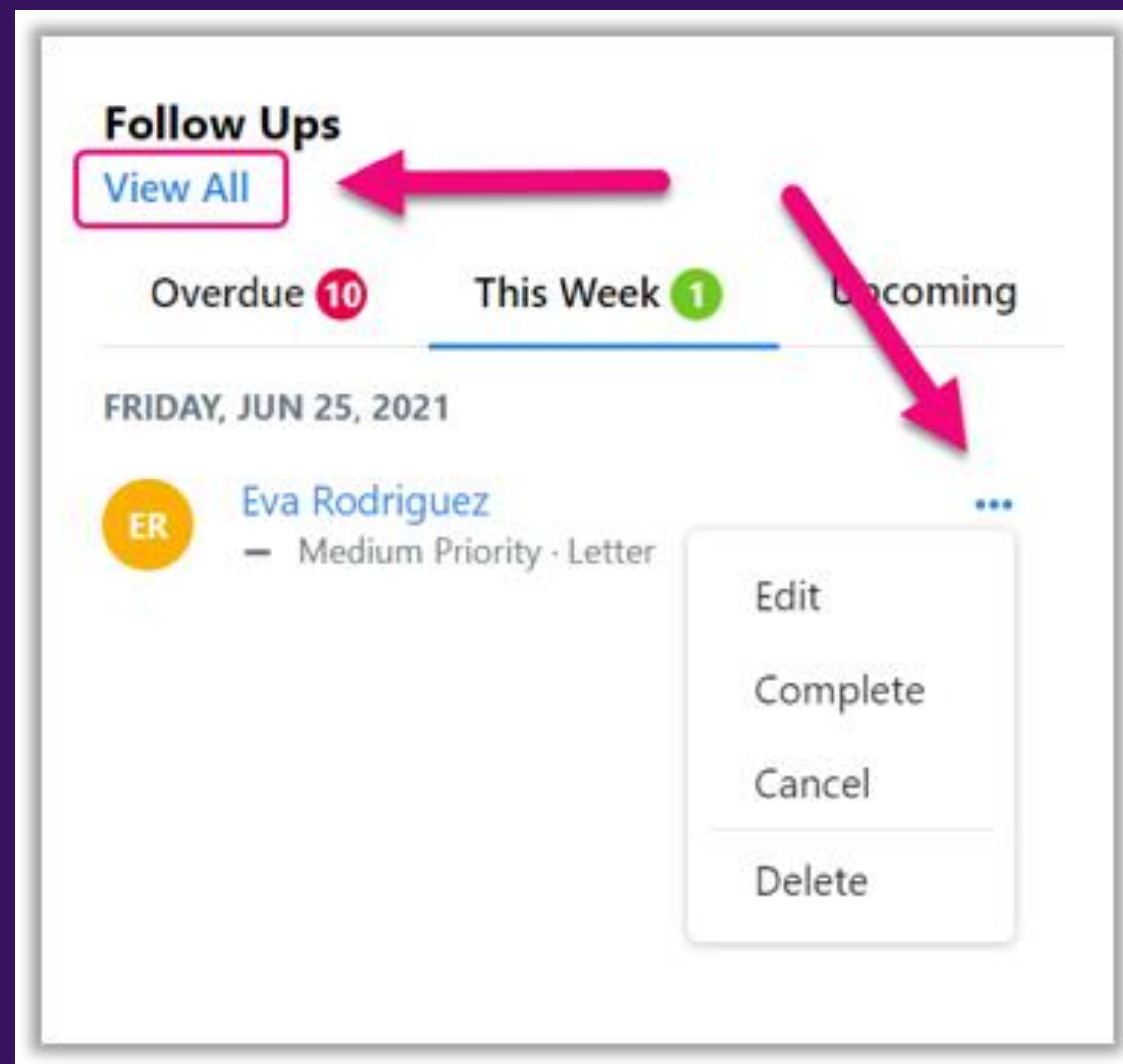
Follow Ups

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](#)

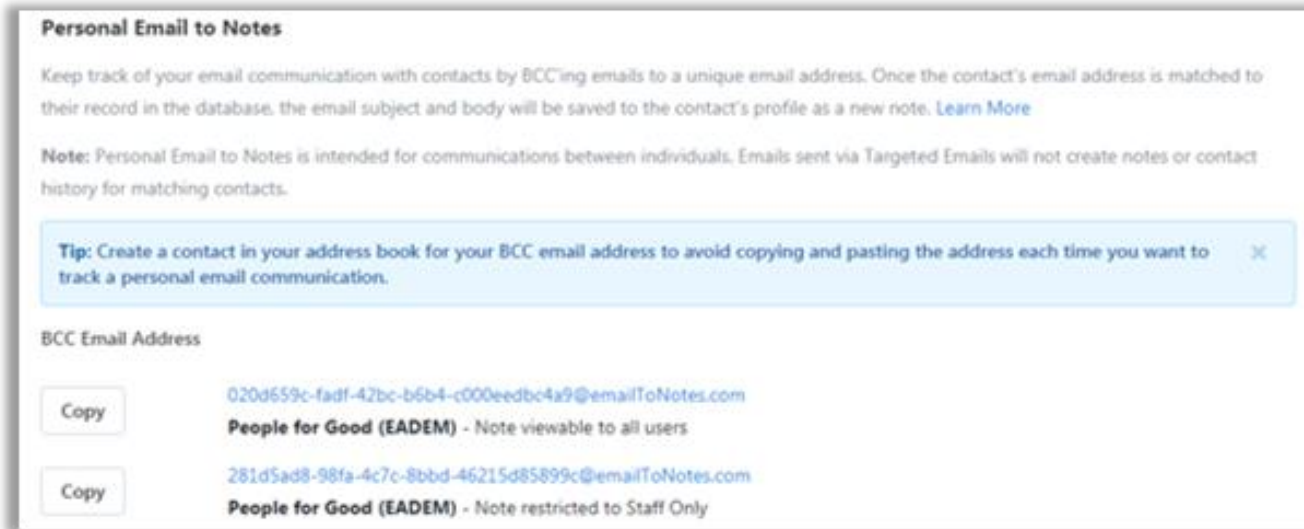


The screenshot displays the 'Follow Ups' section of a software interface. At the top, there is a 'View All' button highlighted with a pink box and a pink arrow pointing to it. Below this are three filter tabs: 'Overdue' with a red circle containing the number '10', 'This Week' with a green circle containing the number '1', and 'Upcoming'. A horizontal line is drawn under the 'This Week' tab. Below the filters, the date 'FRIDAY, JUN 25, 2021' is shown. A list item for 'Eva Rodriguez' is displayed, featuring a yellow circular icon with the initials 'ER', the name 'Eva Rodriguez', and the text 'Medium Priority · Letter'. To the right of the list item is a three-dot menu icon. A pink arrow points from this menu icon to a dropdown menu that is open, showing four options: 'Edit', 'Complete', 'Cancel', and 'Delete'.

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.



Personal Email to Notes

Keep track of your email communication with contacts by BCC'ing emails to a unique email address. Once the contact's email address is matched to their record in the database, the email subject and body will be saved to the contact's profile as a new note. [Learn More](#)

Note: Personal Email to Notes is intended for communications between individuals. Emails sent via Targeted Emails will not create notes or contact history for matching contacts.

Tip: Create a contact in your address book for your BCC email address to avoid copying and pasting the address each time you want to track a personal email communication. ✕

BCC Email Address

<input type="button" value="Copy"/>	020d659c-fadf-42bc-b6b4-c000eedbc4a9@emailToNotes.com People for Good (EADEM) - Note viewable to all users
<input type="button" value="Copy"/>	281d5ad8-98fa-4c7c-8bbd-46215d85899c@emailToNotes.com People for Good (EADEM) - Note restricted to Staff Only

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

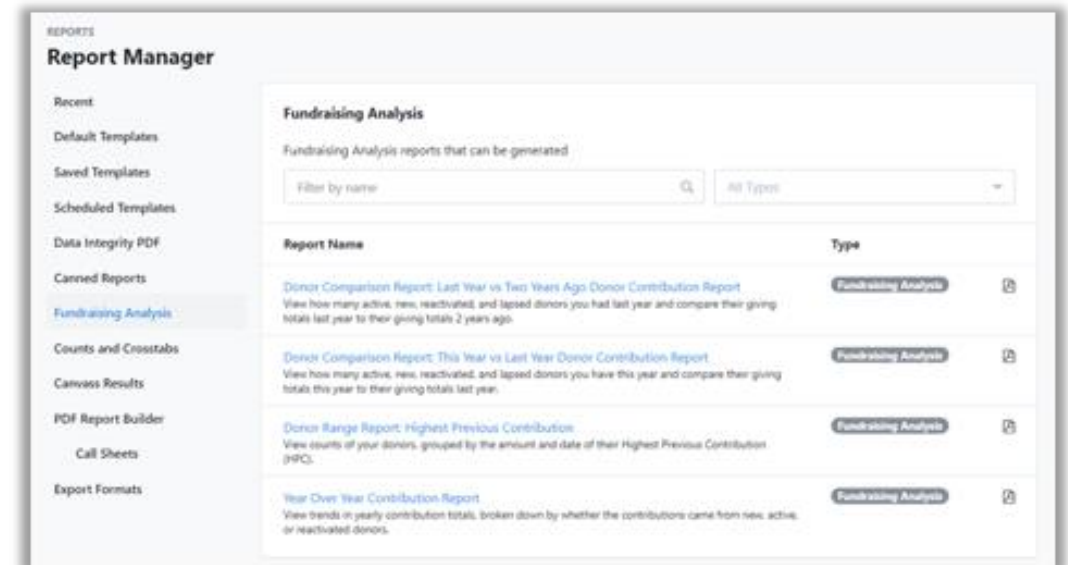
Fundraising Analysis

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:



- 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

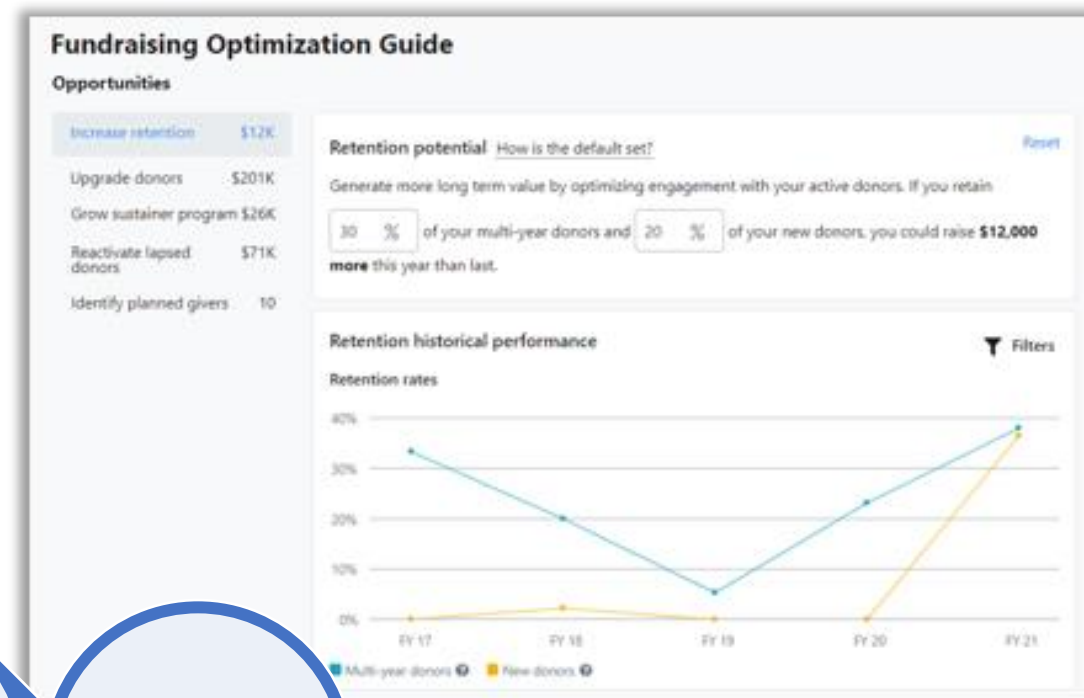
Learn more about how to use **DonorTrends**:

- [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.



Learn more about Fundraising Optimization Guide:

[How to: Raise more with the Fundraising Optimization Guide](#)

Q&A

Additional Resources

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



Feedback & Training Survey

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



Thank You for Attending!

