



# MULTIPLY 417

Passion: The Bridge between People and Purpose

## Let's talk briefly about CRM's and data

Oct 17, 2022

### Good data from your CRM is critical, so let's look at 5 aspects of good data

But first, please respond to the poll. What CRM do you use?

Salesforce

Kindful

Donor perfect

Planning Center

Raisers Edge

Salsa

Virtous

Cause Vox

Flip Cause



Use spreadsheets when necessary, but upload the critical stuff to your database when done with an event.

Sometimes, more is just more. Save yourself some time and energy. Keep it simple.

#### **5. Correct**

Have you ever sent an email to a couple, except it was the husband and his previous wife? Can you say yuck? Now some people will handle it with grace, but you just don't want to be in that position. Plus most of those emails go straight to the trash bin, virtual or real world.

Having the correct information, something even as simple as a prefix, can mean the difference between getting a donation and having your appeal thrown out with the offers for free time share stays.

Never assume information. Filling in an incorrect piece of information can lead to awkwardness with your donors.

### 1. Consistent

Garbage in, garbage out. Yes, create actual protocols or procedures for what must be tracked and recorded in your database. Ensure that those who have "entry" access, know exactly the same procedures and then create a regular audit, doubling checking it is being followed and working (3x yearly?).

Fail in this realm and not only do you get bad reports and send out bad information (like under stating someone's annual tax deduction), but eventually you also get reduced usage, because your treasurer or your development officer, don't trust the information.

### 2. Complete

Recording the important details for your partners can lead to more opportunities for personal touches. This includes gathering additional information allowing you to focus on specific sections of your giving team through acquisition vehicles like survey cards. Lincoln YFC uses a post card system every year to update their database. Not only do they get a huge response, but it passively raises several thousands dollars, more than paying for itself.

No promises on an immediate net return, but potentially incalculable ROI over time. Regardless of the size of your database, personal touches are critical to honorable and Biblically based engagement and partner relationships.

### 3. Current

Current information on your donors also plays an important role in keeping your data healthy. With the availability of [NCOA \(National Change Of Address\) services](#), your organization has access to address changes that will help you maintain contact with your donor pool. This service and other services, like deceased record finders, can save your organization money and resources by preventing a large pile of returned mail.

### 4. Concise

Keep your data simple and by simple I mean only the relevant stuff and in

When dealing with name recognition gifts or strategies, get in writing exactly what the partners/donor wants.

Case in point, if you put my name it print, it is Rev. Rick J. Fritzemeier. You make think it is silly or pompous (well maybe), but I'm also honoring some other people with different aspects of that usage. That's sort of a big deal for most folks.

Without being creepy, use your standard stalking tools, (Google and Facebook) to get a handle on this. Or better yet, use the query as a point of direct contact with the donor and just ask.

Proper donor data management is tough, but it doesn't have to be impossible. But you do have to pay the price of time to be on top of this critical element.

## Teaching your staff biblically based development

8 years as the National Coordinator for Development Training at YFCUSA and now 2+ with my ministry at Multiply 417, I've trained a lot of ministry staff and Executive Directors in development-fundraising.

I know finances can be tight. I know you have a great responsibility to be fiscally wise. But I also know you must make some wise investments in your foundation, structure, and systems.

Allow me an opportunity to be one of those investments. I can and do provide training, coaching and consulting that will reflect a positive ROI (spiritually, emotionally, team morale, and yes, financially).

I know how to provide training that converts into implementation and positive behavior (or skill) changes.

But if you want to double check, feel free to interact with a few of the chapters I've already had a chance to serve. Becky Wilburn at Chicago YFC, Craig Dickinson at Lane County, or Jameson White at Fresno.

Once you are convinced, let's talk about letting me help you plan what kind of training and/or coaching might be the next step to a whole new level of impact. **[Because of my Multiply 417](#)**

appropriate locations. Continuing to track information that your organization no longer uses or tracking it in multiple places can make your database and reporting cumbersome.

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