



# C + R + M

Putting It All Together

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Remember me?

# We focus on customizing Target's direct mail program. So they don't have to.

Xerox software allows Target to deliver specially personalized offers to each and every mailbox. Which in turn allows Target to focus on delighting all their guests, each and every time they visit.

[RealBusiness.com](http://RealBusiness.com)

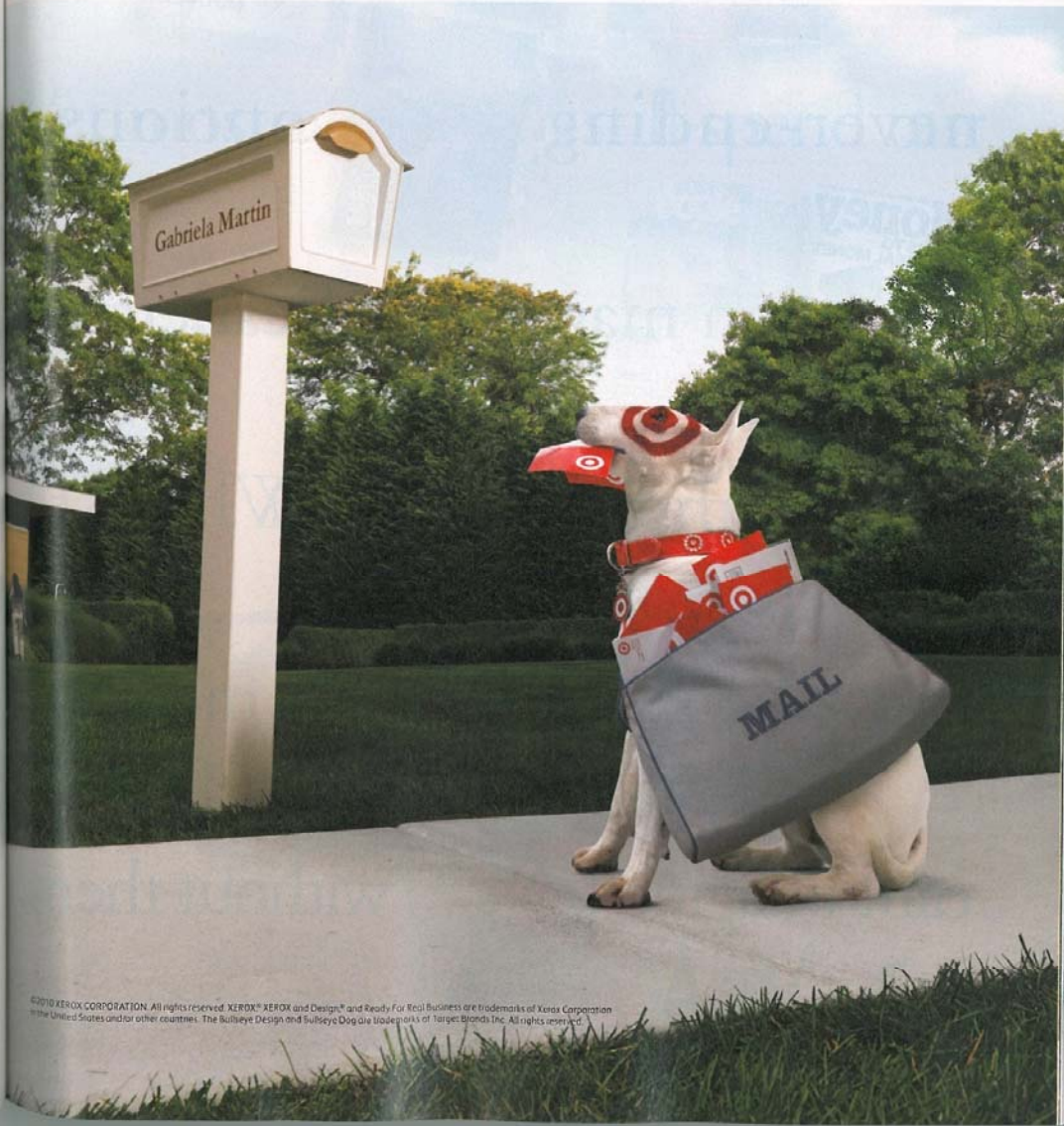
Ready For Real Business **xerox** 

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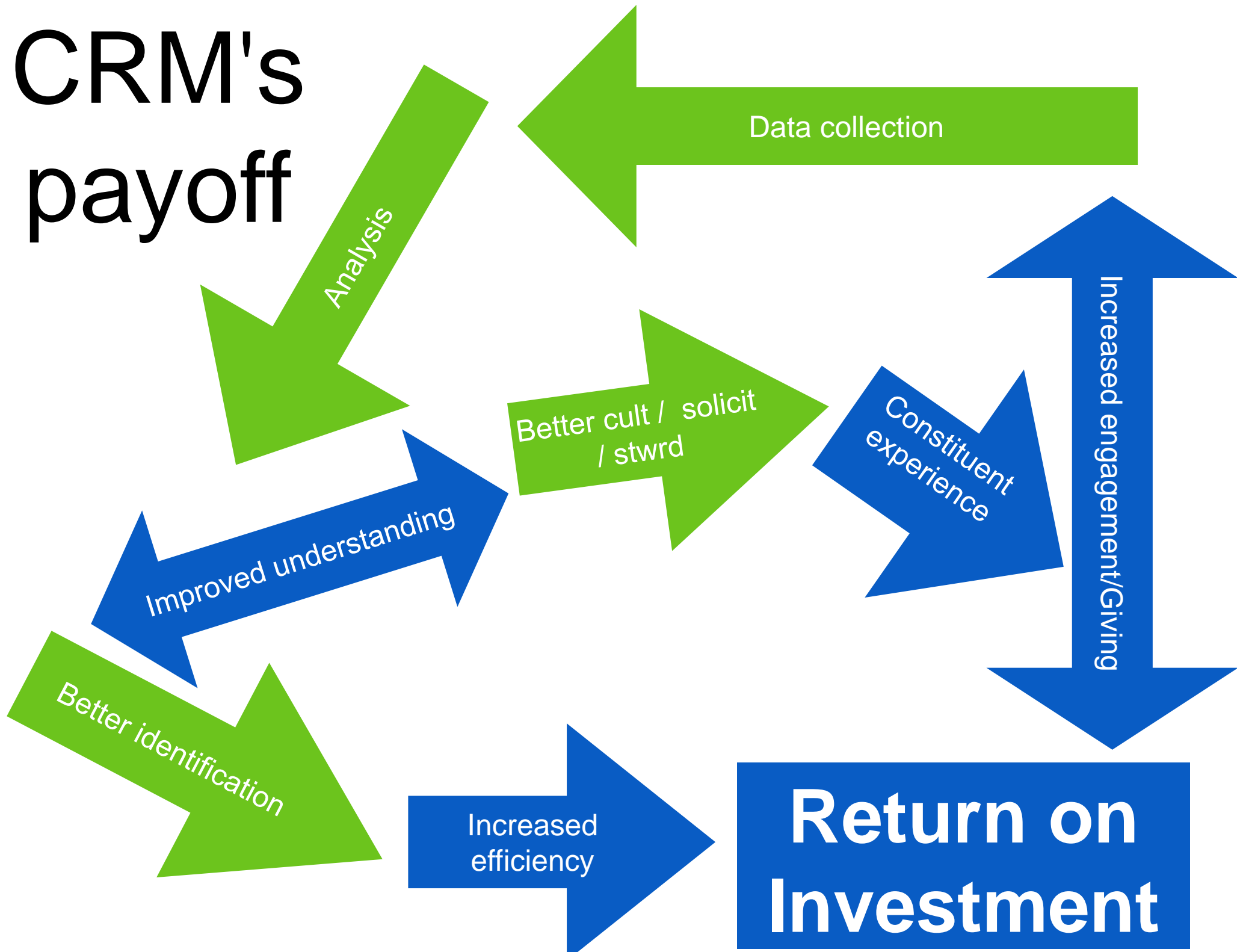
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# CRM's payoff

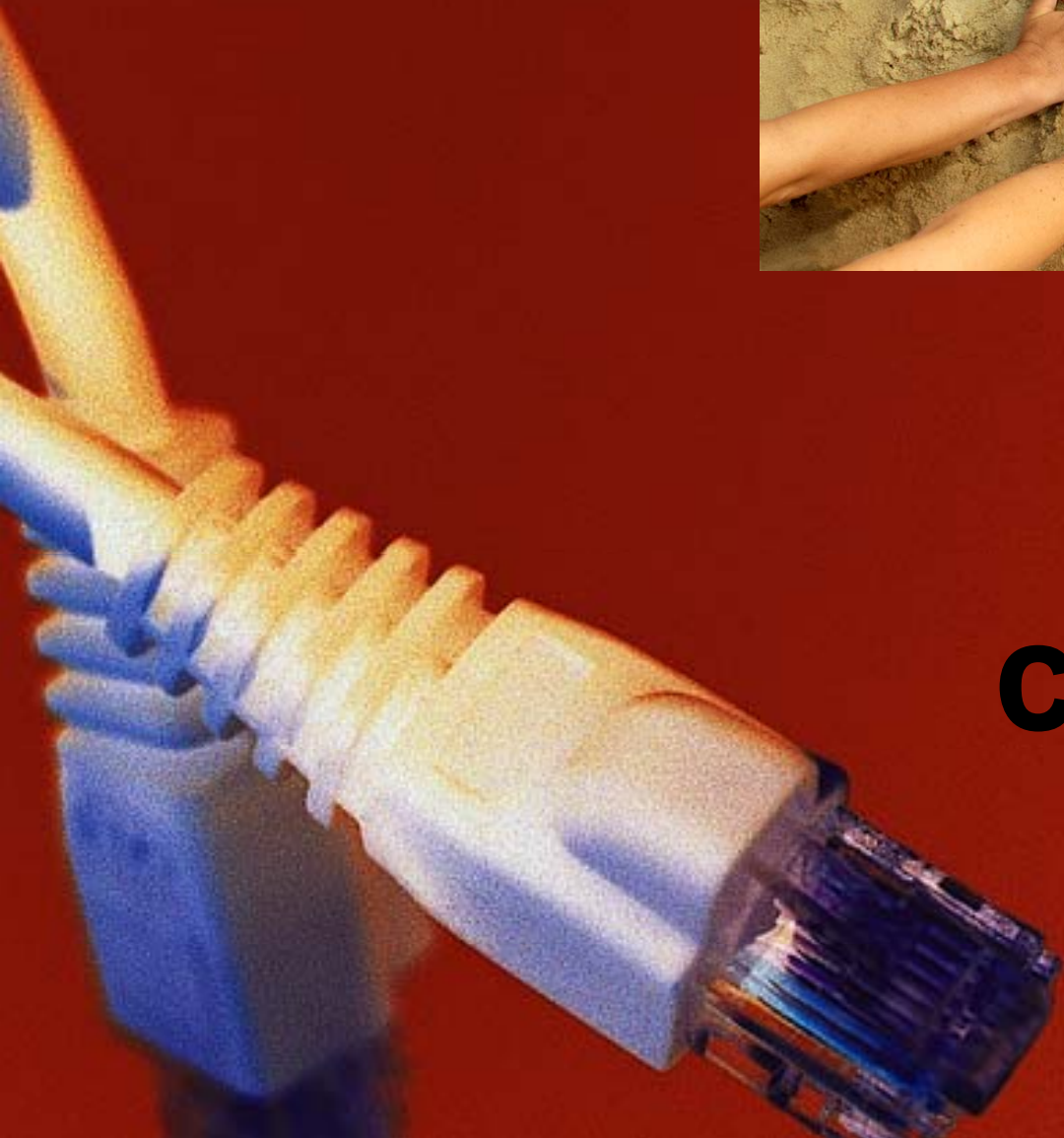




**Create brilliant strategies for people and groups.**



**Seek  
connections.**

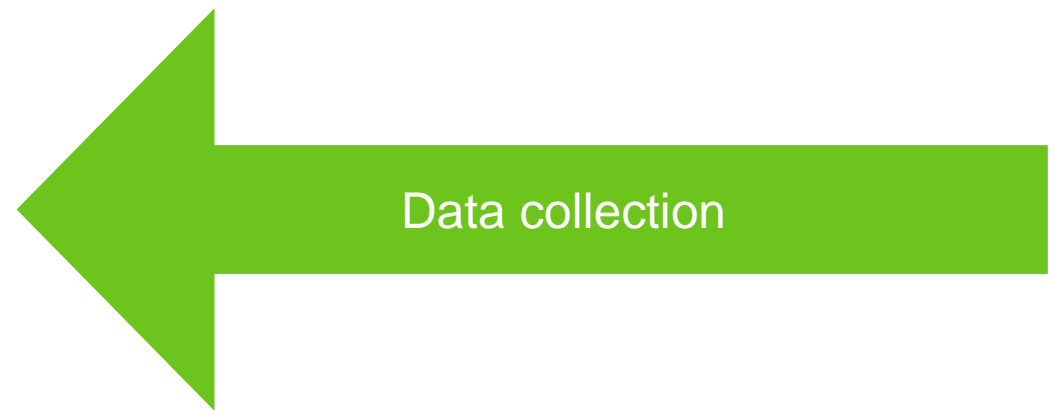




**Go for the stretch gift.**

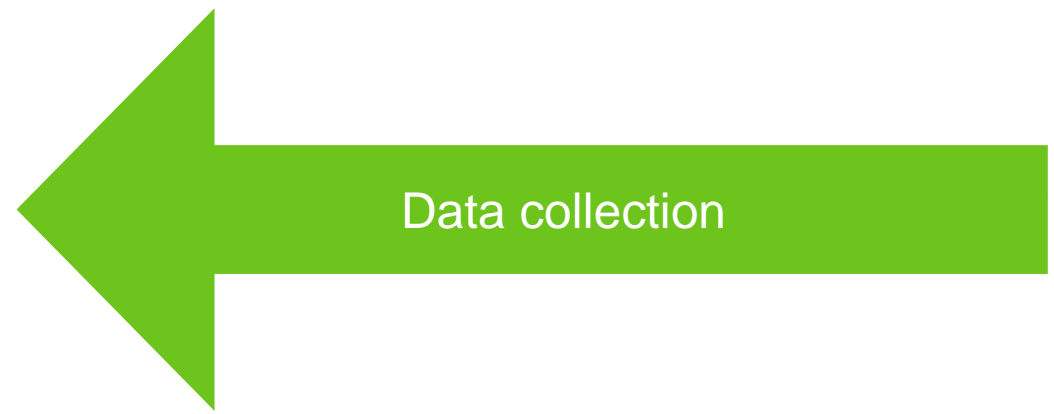


**Tend the  
relationship.**



## **C = Constituent**

- Name
- Spouse name
- Preferred Name
- Address
- Email
- Phone
- Contact preferences
- Gender
- Birth date
- Other family members/friends/associates
- Purchased demographic data
- Giving capacity
- Indicators specific to your organization

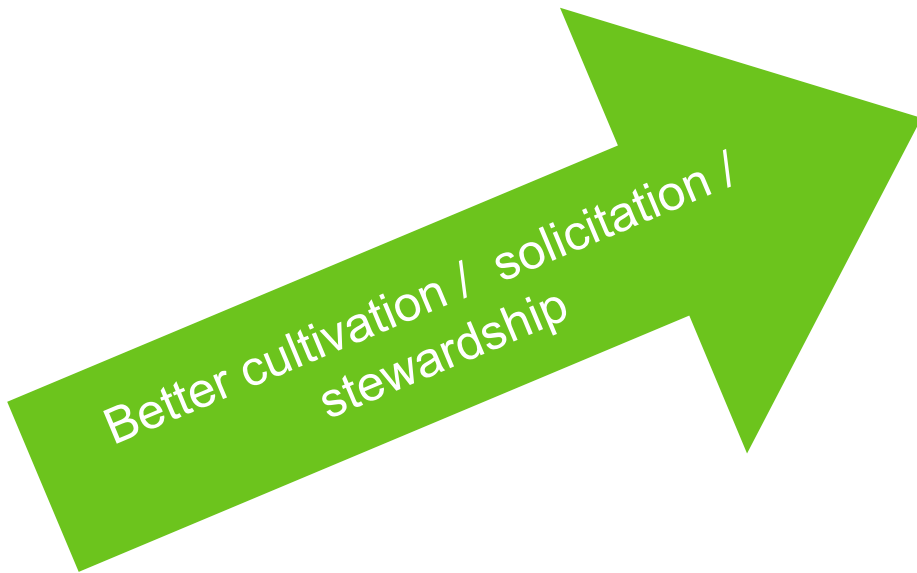


## **R = Relationship**

- Giving
- Contact reports
- Volunteer roles
- Event attendance
- Development officer assigned
- Proposal tracking
- Appeal tracking
- Likelihood scoring
- Affinity/attachment scoring
- Inclination scoring
- Email click tracking
- Survey responsiveness/responses
- Measures specific to your organization, e.g. season ticket holders, alumni, etc.



Recognize patterns.

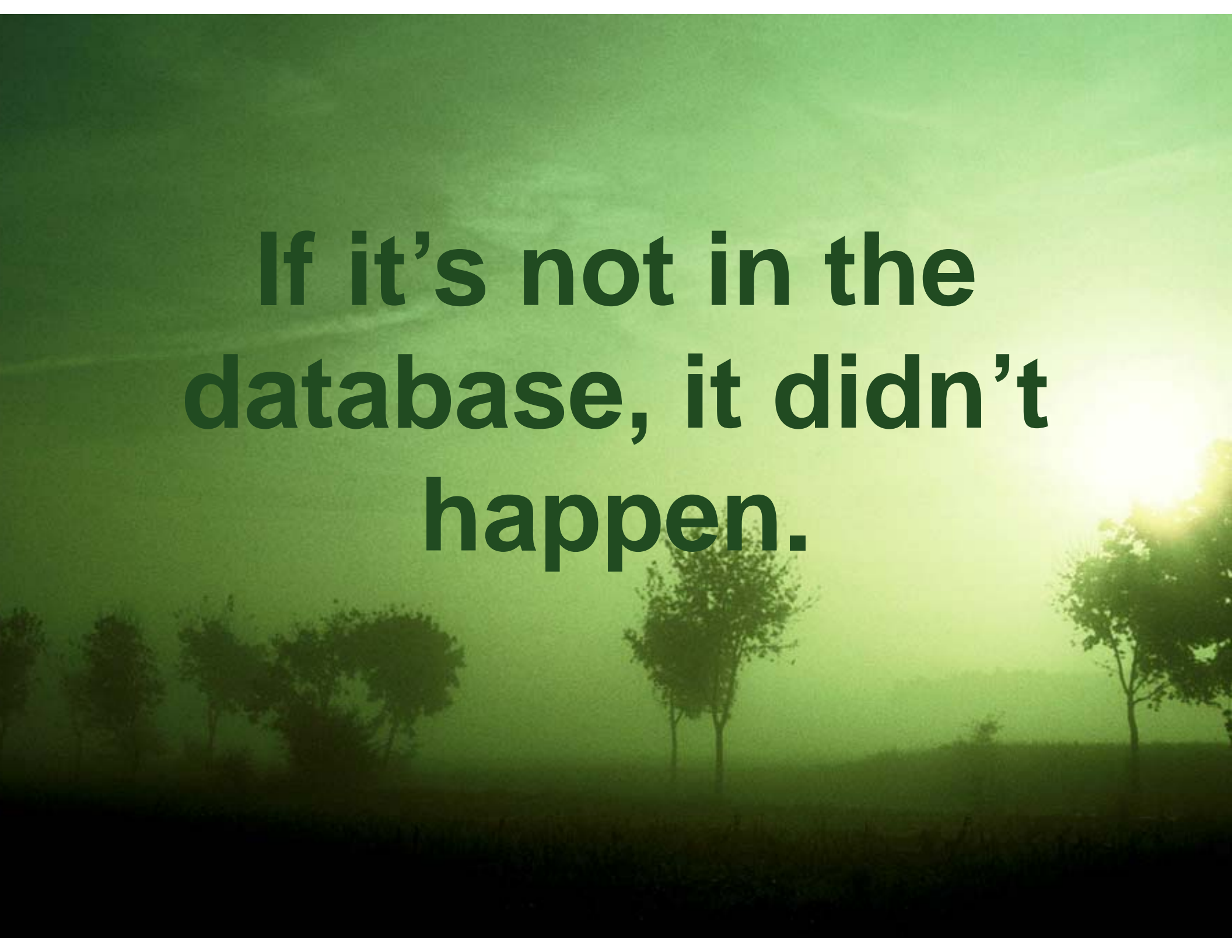


Evaluate prospects, strategies and performance.

**M = Management**

# Care and Feeding for Your CRM



A green-tinted landscape with trees and a bright sun on the right side. The text is overlaid in a dark green color.

**If it's not in the  
database, it didn't  
happen.**



**Data Understanding <--> Business Understanding**

# Where are we headed?

## Strategic

- Allocating staff and budget resources
- Long-term revenue forecasting
- Campaign goal-setting

## Tactical

- Sophisticated appeal segmentation and testing
- Prospect management systems
- Decisions regarding specific initiatives (e.g. cancel an event, raise money for a specific project)

## Operational

- Proper entry and receipting of gifts
- Production of solicitations with correct address data

# Today

- **Contact reports**
- **Appeal coding**
- **Using database for mass email**
- **Prospect management and tracking**
- **Proposal tracking**

# Tomorrow

- **Briefings/profiles generated from database**
- **Analysis of which types of communications work best with particular types of constituents**
- **Email content based on an individual's link clicks in previous emails**
- **Useful on-demand reports to support portfolio management**
- **Revenue forecasting**

# Resources

*Fundraising Analytics: Using Data to Guide Strategy*

Joshua Birkholz, John Wiley & Sons, Inc., 2008

• *Advancement Services: Research and Technology Support for Fund Raising*

John H. Taylor, editor, Council for Advancement and Support of Education (CASE), 1999

• *An Executive's Guide to Fundraising Operations: Principles, Tools & Trends*

Christopher Cannon, CFRE, John Wiley & Sons, Inc., 2011

• *Prospect Research: A Primer for Growing Nonprofits*

Cecilia Hogan, Jones and Bartlett Publishers, Inc., 2003

• *A Kaleidoscope of Prospect Development: The Shapes and Shades of Major Donor Prospecting*

Bobbie J. Strand, CASE, 2008

• Cool Data blog

<http://cooldata.wordpress.com/>

• Fundraising Nerd blog

[www.amandajarman.net](http://www.amandajarman.net)

• Fund Services listserv

[www.fundsvcs.org](http://www.fundsvcs.org)

• Association of Advancement Services Professionals

[www.advserv.org](http://www.advserv.org)

• Association of Professional Researchers for Advancement (APRA)-NW

[www.apra-nw.org](http://www.apra-nw.org)

• APRA International

[www.aprahome.org](http://www.aprahome.org)

Questions?



# Contact



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We improve non-profits and the  
communities they serve.

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