

dp donorperfect

COMMUNITY CONFERENCE
SPARK





Hello, my name is Arlene Lesse

Let me show you how to be more efficient and
effective fundraisers!

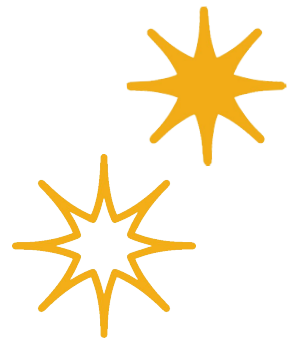
CONNECT WITH ME:



alesse@donorperfect.com



[linkedin.com/in/arlene-lesse](https://www.linkedin.com/in/arlene-lesse)





Spark More Donations Through Timely Connections



Agenda

- End Result
- Contact Management
 - Donor Outreach
 - Portfolio Management including Calculated Fields
- Reports
- SmartActions



End Result with Two Reports

Gift Comparison by Time Period: SOLICITOR by YEAR

From 01/01/2023 to 05/31/2024

SOLICITOR ↕	Count ↕	Sum ↕	Count ↕	Sum ↕	Count ↕	Sum ↕
	01/01/2023 - 12/31/2023		1/1/2024 - 05/31/2024		Total	
NO CODE	2	<u>\$750.00</u>	2	<u>\$725.00</u>	4	<u>\$1,475.00</u>
Mary Moore (MARYMOORE)	3	<u>\$2,100.00</u>	3	<u>\$2,400.00</u>	6	<u>\$4,500.00</u>
Rick Grimes (RGRIMES)	5	<u>\$4,950.00</u>	5	<u>\$5,900.00</u>	10	<u>\$10,850.00</u>
Sean Reilly (SEANREILLY)	2	<u>\$7,250.00</u>	2	<u>\$5,500.00</u>	4	<u>\$12,750.00</u>
Vanessa Charles (VANESSACHARLES)	3	<u>\$3,000.00</u>	3	<u>\$3,600.00</u>	6	<u>\$6,600.00</u>
Total	15	<u>\$18,050.00</u>	15	<u>\$18,125.00</u>	30	<u>\$36,175.00</u>

Portfolio Management

Solicitor Descr	Last Portfolio Mgmt Stage	Donor ID	First Name	Last Name	Last Portfolio Date	Last Portfolio Ask Amount
Mary Moore	3-Cultivation					
		23	Margaret	Avery	02/22/2024	\$5,000.00
		67	Jim	Barkley	03/15/2024	\$7,500.00
		Count: 2				Total: \$12,500.00
Rick Grimes	3-Cultivation					
		29	Kelly	Martin	01/31/2024	\$2,500.00
		30	Thomas	Sawyer	02/17/2024	\$20,000.00
		Count: 2				Total: \$22,500.00
Sean Reilly	2-Qualification					
		46	Jennifer	Stonewall	04/30/2023	
		Count: 1				Total: \$0.00
Sean Reilly	3-Cultivation					
		49	Samantha	Newcomb	05/15/2024	
		Count: 1				Total: \$0.00
Vanessa Charles	3-Cultivation					
		59	Tom	Buresch	08/17/2023	\$10,000.00
		Count: 1				Total: \$10,000.00
		Grand Count: 7				Grand Total: \$45,000.00



Contact Management is the Key

- Track communications and touchpoints with donor
 - Syncs with calendar

Scheduled Donor Outreach

Contacts assigned to you that are past due, for today, or due in 7 days

This Week

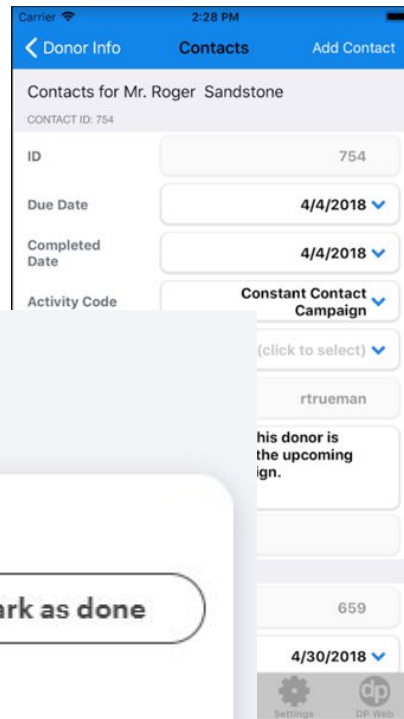
May 14

Justin Ackland

Telephone Call [view details](#)

Mark as done

[Hide contacts due in the next 7 days](#)



Carrier 2:28 PM

< Donor Info Contacts Add Contact

Contacts for Mr. Roger Sandstone

CONTACT ID: 754

ID	754
Due Date	4/4/2018 ▾
Completed Date	4/4/2018 ▾
Activity Code	Constant Contact Campaign ▾
	(click to select) ▾
	rtrueman
	his donor is the upcoming ign.
	659
	4/30/2018 ▾

Settings dp Web



Contact Management Becomes Portfolio Management

↑ Contact Details

Contact/Entry Date



Contact ID

Due Date



Activity



Time

Mailing Code



Completed Date



Assigned To



Contact Notes

[Insert Today's Date](#)

Portfolio Mgmt Stage

Portfolio Mgmt Ask
Amount

Field Properties

Field

Displ

Field Des

Display Properties

☐ TextBox Code Lookup?Display Width: Display Codes/Descriptions: ☒ Descriptions ☐ CodesSection: Position: Leave Blank for DefaultTab Order: Leave Blank for Default☐ New Line☒ Display?

Display Properties

Section: Position: Leave Blank for DefaultTab Order: Leave Blank for Default☐ New Line☒ Display?

Steps For Creating a Calculated Field



**Add a New
Calculation**

**Build a New
Field**

**Select Your
Formula**

**Apply a
Selection
Filter**

**Save Your
Work**

**Run
Calculation**

Portfolio Management - Calculated Fields

- Calculated fields
 - Last Portfolio Management Stage
 - Last Portfolio Management Ask Amount
 - Last Portfolio Management Date

	Active	Order		Calculation Name	Screen	Field To Update	Description
		1		Last Portfolio Mgmt Stage	Contact	LAST_PORTFOLIO_STAGE	Last Portfolio Mgmt Stage
		2		Last Portfolio Mgmt Ask Amount	Contact	LAST_PORTFOLIO_ASK	Last Portfolio Mgmt Ask Amount
		3		Last Portfolio Mgmt Date	Contact	LAST_PORTFOLIO_DATE	Last Portfolio Mgmt Date



Add New Easy Report

Group by:

→ Solicitor Description (Main/Bio - SOLICITOR) ✕

→ Last Portfolio Mgmt Stage (Main/Bio - LAST_PORTFOLIO_STAGE) ✕

Donor ID ✕	First Name ✕	Last Name ✕	Last Portfolio Date ✕	Last Portfolio Ask Amount ✕
Contacts DONOR_ID	Main/Bio FIRST_NAME	Main/Bio LAST_NAME	Main/Bio LAST_PORTFOLIO_DATE	Main/Bio LAST_PORTFOLIO_ASK
Options	Options	Options	Options	Options
Sort ↑↓	Sort ↑↓	Sort ↑↓	Sort ↑↓	Sort ↑↓
Footer	Sort Order	Sort Order	Footer	Footer
Count	2	1	Sum	
	Footer	Footer		
	None	None		

Options and Filters

☒ Include "NO MAIL" Names
☐ Summary (No Detail)
☐ Include Pledges (No Pledge Payments)

Filters (By DONOR)

Manage Fields Clear Values

Selection Filter
 (Portfolio Mgmt Stage is not blank)

Main / Bio

Donor ID

Donor Type

State

Gift / Pledge

Date of Gift

General Ledger

Gift Amount

Solicitation

Run Report

Save Save as Schedule Send

Portfolio Management

Solicitor Descr	Last Portfolio Mgmt Stage	Donor ID	First Name	Last Name	Last Portfolio Date	Last Portfolio Ask Amount
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		Count: 2		Total: \$12,500.00		
Rick Grimes	3-Cultivation	29	Kelly	Martin	01/31/2024	\$2,500.00
		30	Thomas	Saaver	02/17/2024	\$20,000.00
		Count: 2		Total: \$22,500.00		
Sean Reilly	2-Qualification	46	Jennifer	Stonewall	04/30/2023	
		Count: 1		Total: \$0.00		
Sean Reilly	3-Cultivation	49	Samantha	Newcomb	05/15/2024	
		Count: 1		Total: \$0.00		
Vanessa Charles	3-Cultivation	59	Tom	Bucsess	08/17/2023	\$10,000.00
		Count: 1		Total: \$10,000.00		
		Grand Count:		Grand Total:		
		7		\$45,000.00		

Portfolio Management Export Template

Template Settings

	A	B	C	D	E	F	G	H
1	DONOR_ID	first_name	last_name	LAST_PORTFOLIO_STAGE	LAST_PORTFOLIO_DATE	LAST_PORTFOLIO_ASK	SOLICITOR	
2	23	Margaret	Avery	3-Cultivation	2/22/2024	\$5,000.00	Mary Moore	
3	67	Jim	Barkley	3-Cultivation	3/15/2024	\$7,500.00	Mary Moore	
4	59	Tom	Burgess	3-Cultivation	8/17/2023	\$10,000.00	Vanessa Charles	
5	29	Kelly	Martin	3-Cultivation	1/31/2024	\$2,500.00	Rick Grimes	
6	49	Samantha	Newcomb	3-Cultivation	5/15/2024		Sean Reilly	
7	30	Thomas	Sawyer	3-Cultivation	2/17/2024	\$20,000.00	Rick Grimes	
8	46	Jennifer	Stonewall	2-Qualification	4/30/2023		Sean Reilly	
9								

Solicitor Analysis

Gift Comparison by Time Period: SOLICITOR by YEAR

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SmartActions

- Automations to make you more efficient
 - Trigger
 - New Gift Save
 - Selection filter: Gift Amount greater than or equal to \$1,000 and Solicitor = X
 - Configure Actions
 - Send an email to Solicitor X
 - Create contact transaction for Solicitor X to thank donor



Recap

- Staying in touch with donors is critical to retention
- Use Contact Management to track past and future touchpoints
- Portfolio management can be tracked on the Contacts screen
 - To identify touch points made with major donors
 - To measure the effectiveness of solicitors
- Use Calculated Fields to simplify reporting on portfolio management
- Various report options available
- SmartActions can automate the notification of the gift to the solicitor





Q & A

Thank you!