

dp donorperfect

# COMMUNITY CONFERENCE **SPARK**





# Hello, my name is Donna Mitchell

“Do the best you can until you know better. Then when you know better, do better.” ~Maya Angelou

## CONNECT WITH ME:



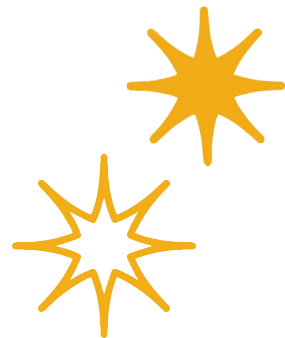
[dmitchell@donorperfect.com](mailto:dmitchell@donorperfect.com)



<https://www.donorperfect.com/learning-center/>



[www.linkedin.com/in/donna-mitchell-022a697/](https://www.linkedin.com/in/donna-mitchell-022a697/)





# Spark Productivity: Streamline Your Communication Processes

Enhance productivity among your staff  
and inspire lasting donor relationships!



# Your Current Situation - New Donors

- ★ Recognize and Communicate
- ★ Schedule Reports
  - Track Engagement Status
  - Monitor your cultivation success
- ★ Stewardship = Lifelong Donors



# What's In It For You?

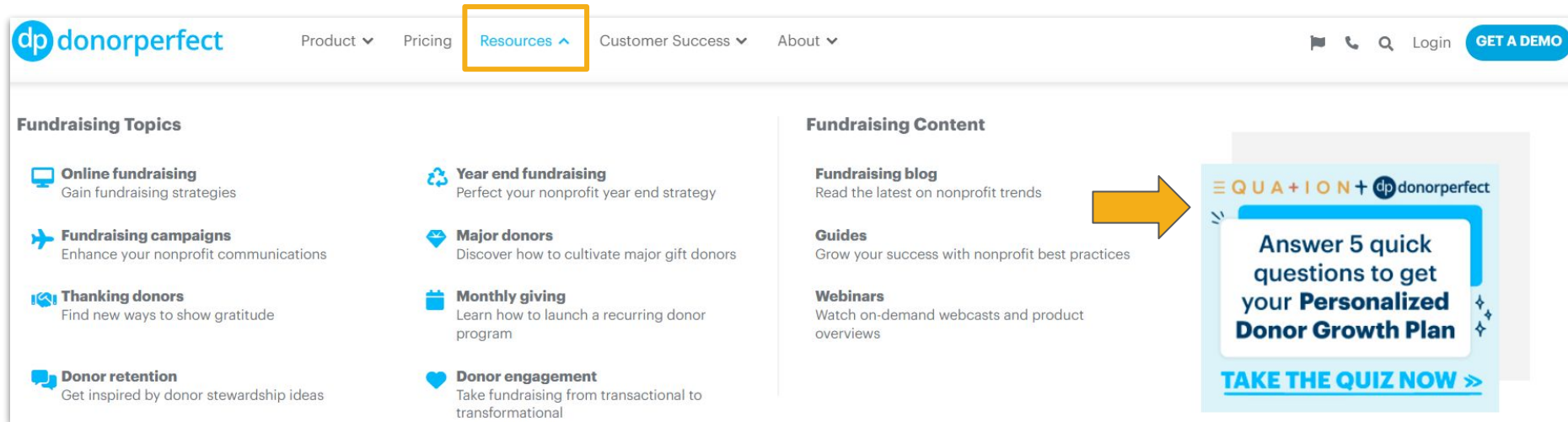
**Track Stewardship: Work smarter, not harder:** Streamline your staff's cultivation, communication, tracking, and reporting processes by using the data you already have in your DP system, and then get results delivered to your inbox using scheduled reports.

**Monitor Success:** monitor the effectiveness of donor communications and engagement that drive donor retention. Use DonorPerfect reports and tools to tweak and replicate your cultivation success.






# What's In It For You?









## Quiz: Personalized Growth Plan to Find New Donors



The screenshot shows the Donorperfect website's navigation bar and main content area. The 'Resources' link in the navigation bar is highlighted with an orange box. A large orange arrow points from the 'Fundraising Content' section to a promotional banner for a quiz.

**dp donorperfect** Product ▾ Pricing Resources ▴ Customer Success ▾ About ▾    Login **GET A DEMO**

### Fundraising Topics

-  **Online fundraising**  
Gain fundraising strategies
-  **Fundraising campaigns**  
Enhance your nonprofit communications
-  **Thanking donors**  
Find new ways to show gratitude
-  **Donor retention**  
Get inspired by donor stewardship ideas
-  **Year end fundraising**  
Perfect your nonprofit year end strategy
-  **Major donors**  
Discover how to cultivate major gift donors
-  **Monthly giving**  
Learn how to launch a recurring donor program
-  **Donor engagement**  
Take fundraising from transactional to transformational

### Fundraising Content

- Fundraising blog**  
Read the latest on nonprofit trends
- Guides**  
Grow your success with nonprofit best practices
- Webinars**  
Watch on-demand webcasts and product overviews

**QUA+ION+ dp donorperfect**

Answer 5 quick questions to get your **Personalized Donor Growth Plan**

**TAKE THE QUIZ NOW >>**





# AGENDA

- ★ The Result
- ★ The Goal
- ★ Targeting New Donors
- ★ Track Donor Engagement
- ★ Create customized reports
- ★ Schedule reports delivered to your inbox





## The Result

Scheduled engagement and gift reports delivered to your mailbox



# Scheduled New Donor Reports

## New Donors This Quarter

Donor ID	First Name	Last Name	Email (EMAIL)	Initial Gift Date	Initial Gift Amount	Last Solicitation	Number of Gifts
505	Amanda	<a href="#">Tadrzynski</a>	atadrzynski@softerware.com	04/11/2024	\$25.00	Annual Appeal 2024	1
Grand Count:				Grand Total:		Grand Total:	
1				25.00		1.00	

## Constituent Summary

Donor ID	Name	Address	Phone	Most Recent Date Given	Most Recent Amount Given	Fiscal Year-to-date	Lifetime Giving Total	Number of Gifts
505	<a href="#">Amanda Tadrzynski</a>	1 Harris Ave Langhorne, PA 19047-5000	M:(267) 563-0540	04/11/2024	25.00	25.00	25.00	1

Donor Count 1

Scheduled reports are included in several DonorPerfect packages





## The Goal

Design and use scheduled reports to keep your staff informed of new donor engagement as they move through your new donor welcome series

# DonorPerfect Fields to Identify New Donors

Fields to find new donors

- ★ Initial Gift Date (Main)
- ★ First Gift = Yes (Gifts)

## Gift Details [Raise more with a donation form!](#)

* Date of Gift	04/11/2024	
Gift Amount	25.00	
Type of Gift	Credit Card	 
Reference / Check Number	9854875	
Fair Market Value	0.00	
QuickBooks Class		
Campaign	Annual Campaign 20	

## Giving & Engagement Profile

Fiscal Year-to-date	25.00	Calendar Year-to-Date	25.00	Lifetime Gift Total	25.00
Last Year YTD	0.00	Last Calendar Year CYTD	0.00	Number of Gifts	1
2 Years Ago CYTD	0.00	2 Years Ago YTD	0.00	Number of Years Donated	1
3 Years Ago YTD	0.00	3 Years Ago CYTD	0.00	Average Gift Amount	25.00
4 Years Ago YTD	0.00	4 Years Ago CYTD	0.00	Max Gift Amount	25.00
5 Years Ago YTD	0.00	5 Years Ago CYTD	0.00	Maximum Gift Date	04/11/2024
6 Years Ago YTD	0.00	6 Years Ago CYTD	0.00	Initial Gift Amount	0.00
Last Gift Date	04/11/2024	Last Gift Amount	25.00	Initial Gift Date	04/11/2024
Last GL Code	Annual Fund	Last Solicitation	Annual Appeal 2024	Last Contact Activity	
Personal Engagement Count	0	Most Frequent Solicitation Description	Annual Appeal 2024	Most Frequent Solicitation Code	AA24

# Finding New Donors

- ★ DonorPerfect Fields
    - Initial Gift Date (Main)
    - First Gift = Yes (Gifts)
  - ★ DonorPerfect Filters
    - Initial Gift Date equals
      - Today
      - This week
      - This month
      - This Year
    - First Gift = Yes
- AND
- Gift Date between (Date Range)



***Tip:*** You can also use your filters in your Constant Contact welcome series email campaigns!



★ Screen Designer

★ Calculated Fields

★ SmartActions

★ Constant Contact

★ Create user-defined fields that can be used in filters and reports

★ System and user-defined calculated fields can do the work for you and be used in filters and reports

★ Automated workflows that create actionable tasks and help your team stay informed

★ Use new donor filters for your welcome series email campaign

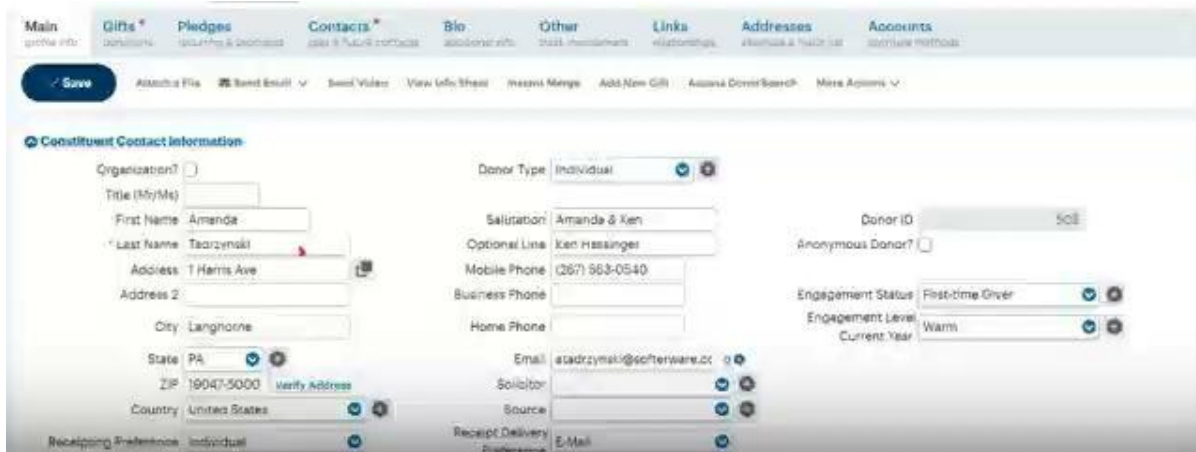
# Examples of User-Defined Calculated Fields

## ★ Engagement Status

- First-time Donor
- At Risk
- Lapsed Donor

## ★ Engagement Level

- Hot
- Warm
- Cold



The screenshot shows a web-based form for "Constituent Contact Information". The form is divided into several sections with tabs at the top: Main (profile info), Gifts (donations), Pledges (pledges & promises), Contacts (add & manage contacts), Bio (add donor info), Other (donor information), Links (relationships), Addresses (addresses & mail list), and Accounts (donor methods). Below the tabs, there are buttons for "Save", "Attach a File", "Send Email", "Send Video", "View Info Sheet", "Inspect Merge", "Add New Gift", "Assign Donor Search", and "More Actions". The form fields are organized into two main columns. The left column includes fields for "Organization?", "Title (Mr/Ms)", "First Name" (Amanda), "Last Name" (Tadzynski), "Address" (1 Harris Ave), "Address 2", "City" (Langhorne), "State" (PA), "ZIP" (19047-5000), "Country" (United States), and "Recalculating Preference" (Individual). The right column includes fields for "Donor Type" (Individual), "Salutation" (Amanda & Ken), "Optional Line" (Ken Hassinger), "Mobile Phone" ((267) 963-0540), "Business Phone", "Home Phone", "Email" (atadzynski@software.cc), "Solitor", "Source", "Receipt Delivery Preference" (E-Mail), "Donor ID" (501), "Anonymous Donor?" (checkbox), "Engagement Status" (First-time Donor), "Engagement Level" (Warm), and "Current Year". Each field has a small icon to its right, likely for editing or deleting the field.



# Scheduled Reporting Needs

## ★ New Donors

- Today
- This week
- This month
- This year

## ★ Scheduled Reports

- Daily
- Weekly
- Monthly



## Demonstration

Create and schedule an Easy Report listing new donors and engagement status



# Recap

- ★ The Goal
- ★ Targeting New Donors
  - Initial Gift Date
  - First Gift = Yes
- ★ Track Donor Engagement
  - Personalized Emails and Letters
- ★ Create and schedule customized reports delivered to your inbox



# DonorPerfect Scheduled Reports

## ★ All Easy Reports

### Listing Reports

- ★ Constituent Summary
- ★ Count Records
- ★ Donor Names, Addresses, and Phone Numbers

## Financial Reports

- ★ Adjusted Gifts
- ★ Gifts by Date
- ★ Daily Log
- ★ Last Year But Not This Year
- ★ Monthly Giving Report
- ★ Some Year But Not This Year
- ★ Tribute Gifts
- ★ Tribute Listing
- ★ Tribute Summary





# DonorPerfect Resources

## DonorPerfect Community Knowledgebase Articles

### [Acquiring New Donors Quiz](#)

[DonorPerfect Calculated Fields](#)

[SmartActions](#)

[Using the Easy Report Builder](#) [SmartActions](#)

[Constant Contact Integration](#)

[Constant Contact Field Mapping](#)

## \*[DonorPerfect Live Webinars and Virtual Classes](#) & [#On-Demand Webinars](#)

### Filters and Reporting

#10 Finding the Data You Want 101

#11 Finding the Data You Want 102

#5 Basic Reporting 101

#12 Using DP Reports

#15 Financial Reporting in DonorPerfect

### Contact Management

#13 Creating a Mailing List

\*Custom Data for Donor Communication

### Constant Contact

#DonorPerfect & Constant Contact

\*Using DonorPerfect for an Email Campaign

\***Calculated Fields** - A Way to Use Your Data

\***Acquiring New Donors**

\***Screen Designer in DP:** Data Entry Screens Your Way

\***DP Easy Report Builder**

\***SmartActions:** Doing the Work to Keep You Informed and Connected





# Questions?





# Thank you!

