CommunityConference

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

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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

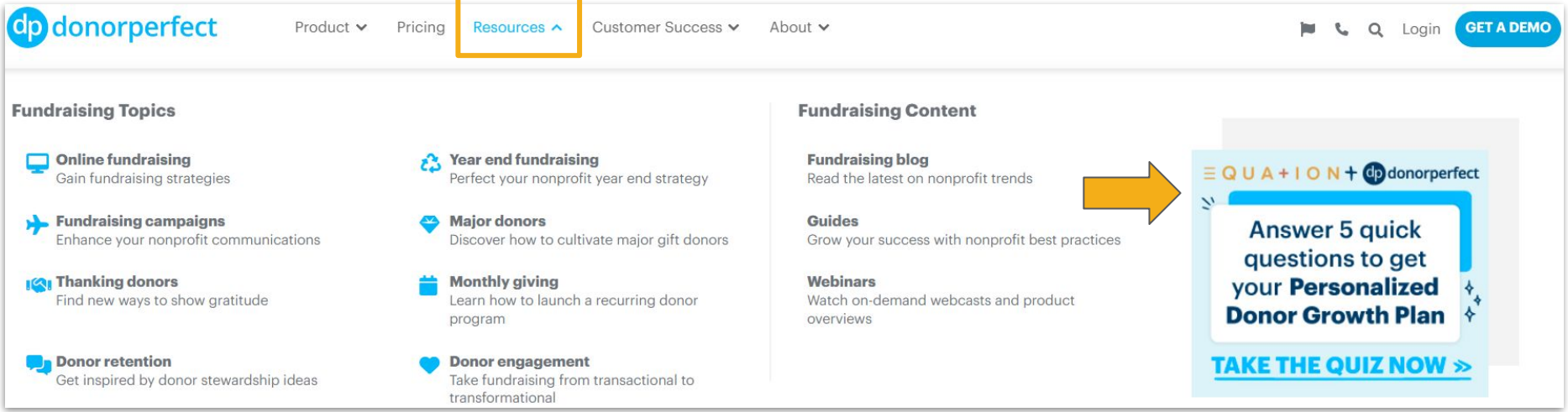
What's In It For You?

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



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	Tadrzynski	atadrzynski@softerware.com	04/11/2024	$25.00	Annual Appeal 2024	1
Grand Count: 1					**Grand Total: 25.00**		**Grand Total: 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	Amanda Tadrzynski	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

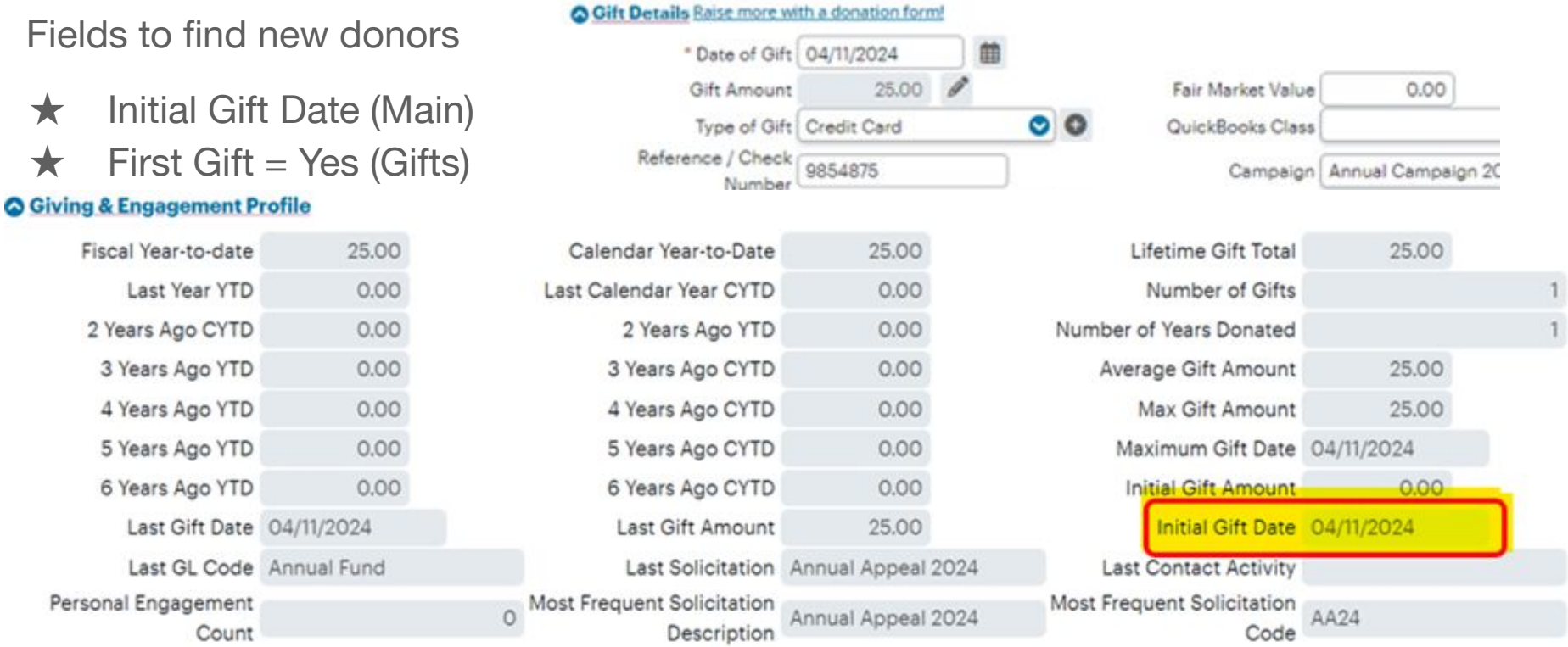
The Goal

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)



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)

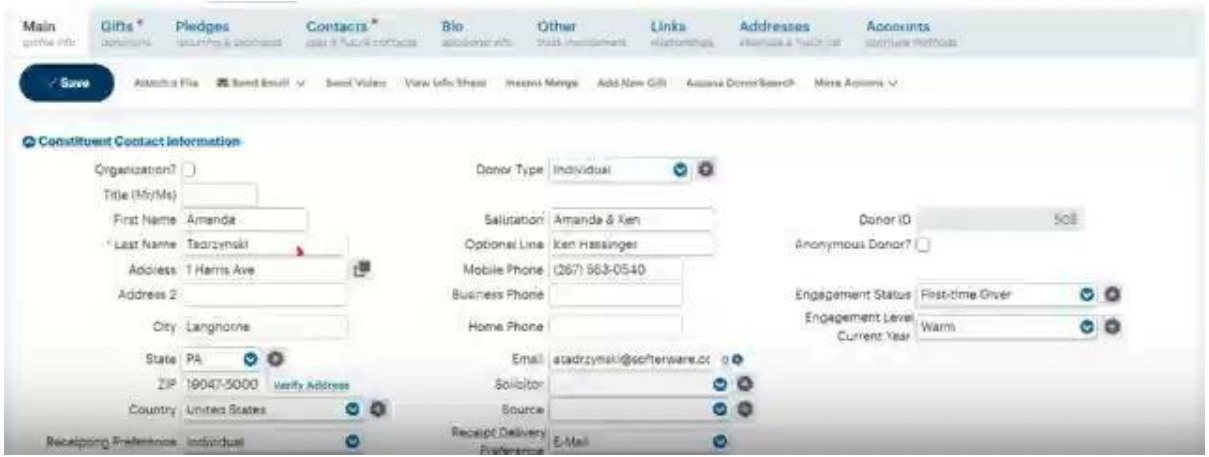
***Tip**: You can also use your filters in your Constant Contact welcome series email campaigns!*

- ★ 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



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!