

Tame Your Donor Data Dragons

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Presentation Outline

1. Donor Data 101

- a. What is data?
- b. The Good, The Bad, & The Ugly
- c. Common data tools used by nonprofits
- d. Assessing your current and prospective data tools
 - i. Bad tools, bad data, or both
 - ii. The best short-term data/tool plan: Love the one you're with
 - iii. The joys & sorrows of "all-in-one" tools
 - iv. The joys & sorrows of too many tools

2. Let's Tame Those Data Dragons

- a. Eliminate unproductive data dumps
- b. Identify & remove unnecessary data
- c. Sort, filter, & scrub your data
- d. Eliminate duplicates
- e. Verify addresses (NCOA)

3. You've Tamed Your Data Dragons. Now What?

- a. Integrations- get your tools to talk to each other
- b. Improve your communications
- c. Learn more about your donors
- d. Identify donor prospects
- e. Measure, improve, repeat

4. Tools

- a. TTG's Fundraising Metrics Dashboard
- b. Fundraising Report Card
- c. Fundraising Effectiveness Project

5. Questions & Answers

Key Questions & Take Aways

What are my Data Dragons (a.k.a., what data problems do I need to solve)?

Are my dragons the result of bad tools, bad data, or both?

What integrations exist in my current tools?

CRM:

Email Marketing:

Donation/Payment Processor:

Other _____:

What three things will I do in the weeks and months ahead to improve my data?

1.

2.

3.

Additional Resources Available!

Email Jonathan Helder at jhelder@timothygroup.com to receive digital copies of the slides from today's presentation as well as a digital copy of the Timothy Group's Fundraising Metrics Dashboard. Get access to great articles, webinars, and other resources at timothygroup.com. Be sure to sign up for our e-newsletter "What's New in Donor Relations" and to receive our inspiring "Fundraising Verse of the Week."

Other tools mentioned in the presentation

- FundraisingReportCard.com
- Associations for Fundraising Professionals Fundraising Effectiveness Project

the **TIMOTHY** group

DATA SERVICES

Whether it's managing donor records, understanding the effectiveness of your communications effort, or helping your team identify that next big prospect, data plays a vital role in your organization's success. The Timothy Group is committed to providing the best qualitative and quantitative tools to support our clients. Through our Data Services we can help "tame your data dragons" to ensure you are using the right tools to move your ministry into the 21st Century.

Digital Tool Assessment & Recommendations

Do you love your current digital tools (e.g., donor database/CRM, payment processor, email marketing software)? Do they provide best-practice outcomes at an appropriate cost for your organization? Do your tools "talk to each other" (aka, integrate)? The Timothy Group works with the ever-increasing list of digital tools and can help you identify what tools are the best fit for your organization. While assessing current tools can be complicated and changing to new tools can be nerve-wracking, the Timothy Group can give you confidence to make the right choice for your organization's long-term success.



Data Cleaning & Optimization

Clean and well-maintained data improves the effectiveness of your communications and fundraising efforts saving your organization time and money. Could your organization's data use a good scrubbing? Do you need help setting up the internal processes needed to keep things tidy? Whether it is finding duplicates donors, identifying incorrect data, verifying addresses through the US postal service (aka NCOA), or pulling data from multiple sources into one location, the Timothy Group can help you get your data in tip-top shape.

Reporting & Segmentation

Having clean data and great tools alone is not the goal. The true value derived from your data/tools comes from fully utilizing them to support your organization's communications and fundraising efforts. Does your donor database feel like a black box? Do you need help creating reports and/or dashboards to help increase transparency? Do you need help with prospect identification and segmentation? We use a multi-factor approach to help you identify your best prospects for legacy gifts, monthly donors, major donors, etc. Our experienced team can help you build the reports and dashboards you need to support your next campaign.



Want to learn more about how the Timothy Group's Data Services can help your ministry?

We would love the opportunity to learn more about your ministry and help you maximize your data and tools. While many of the services above are included in our service contracts, we are happy to quote Data Services by the hour or by the project. To set up a free 30-minute initial consultation simply ask your current Timothy Group Consultant or contact Jonathan Helder, Timothy Group Consultant and Data Specialist, at 616-901-5669 or jhelder@timothygroup.com.