

Simple Tips to Get the Most Out of Your Donor Data



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions



FUNDRAISING TECH

Made for you



Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



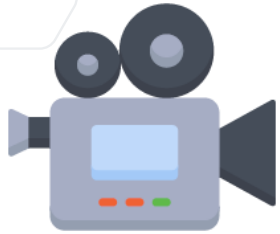
Time saving data tools

Save time, attract and retain donors, and raise more money with all of your fundraising data in one place



Powerful integrations

Easily integrate with your third-party CRM, email provider, and accounting software



+ A copy of the slides can be requested at
go.qgiv.com/simple-tips-for-data



+ Feel free to ask questions!
Email marketing@qgiv.com.



+ Share your highlights and takeaways with the
[#qgivwebinar](https://twitter.com/qgivwebinar) hashtag, and make sure you follow
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Meet the Speaker



Justin Cook, Product Marketing Manager

- + With Qgiv for 4 years and a marketing professional for 7!
- + Digital marketing and optimizing the user journey are my areas of expertise.
- + I have 3 animals: 1 dog and 2 cats.

Why Focus on Donor Data?



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Why is Donor Data Important?

DATA



Monitor performance of fundraising campaign and events.

Make better fundraising decisions with strategies backed by data.

Improve relationships with your donors.

Your organization raises more!





+

Data Tells a Story

Data without proper presentation looks like a giant mess.

As your organization learns to use data, you gain basic fundraising insight into your donors.

The goal is to tell a story with your data to view in-depth insights of how donors interact with your organization.

DATA



SORTED



ARRANGED



PRESENTED VISUALLY



EXPLAINED WITH A STORY





+

What Are We Covering Today?

We'll take a look at all aspects of donor data and how your organization can use this information to improve your fundraising campaigns and events. We'll cover:

- + What data you need be looking at
- + How to use data to improve your fundraising
- + Tools to track and collect donor information
- + Qgiv's data tools



+



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Our Journey



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Building Our Data House



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What It's Like Without Data

Without donor data, there is nothing. However, we have the proper programs in place (or land in this case!) to start collecting what we need!

In order for us to improve our campaigns and events, we need to implement a few things.





Track Donor Data

In order to use data, you need to have the proper tracking in place to collect and retain that information! Things your organization should be using to enhance your fundraising:

- + Fundraising software and a nonprofit CRM
- + Tracking platforms like Google Analytics and Facebook Pixel

Make sure to collect donor information as well as transactional data!





Identify Important Data

Donor data is plentiful, but the most important data will help you monitor fundraising performance effectively!

1. Total amount raised from all sources (offline, online)
2. Total donations/registrations
3. Total donors/event attendees
4. New donors/recurring donors
5. New event attendees/returning event attendees
6. One-time vs. recurring donations
7. Donors preferred restrictions





Organize Your Data

The next step in our story is to acquire the tools we need to view and compare our campaign/event performance.

- + Build dashboards and reports to view our performance holistically
- + Add comparisons to previous campaigns/events by time frame
- + Create form comparisons to compare one fundraiser to a similar fundraiser





The Final Step: Context

Context is the final piece of our puzzle. Our foundational data and our tools are very important but without context, our data doesn't tell us the full story and we can miss out on very important insights. Things to look at:

- + What appeals/invites did we send out?
- + Which channels did we send these?
- + What was our messaging?
- + Which audience did we target?

Analyze the performance of each!





Our Data Story



Implement data tracking through a fundraising tool, a CRM, and data platforms.



Identify your most important data for each type of campaign/event.



Organize your data in an easy to view and understandable format.



Add context to your data to tell your story!



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Advanced Donor Data

Take the next step in your data journey with advanced donor data. These stats will help your organization dive into your donor's giving patterns and help you build deeper donor relationships.

1. At-risk or lapsed donors
2. Donor retention rates
3. Donor churn rate
4. Donor levels: small, mid-level, and major donors



How to Use This Data to Improve Your Fundraising



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Improve Fundraising Appeals

Use donor data to improve the effectiveness of your fundraising appeals! One method is to send targeted fundraising appeals based on the interactions of the donor with your organization.

Send targeted appeals to:

- + One-time donors vs. recurring donors
- + Past event attendees vs. new attendees
- + Fundraisers from peer-to-peer events



COVID-19 has brought many changes to everyday life, but one thing remains the same: cats and dogs in our community need help.

Animal shelters like SPCA Florida may have to close to the public and operate with reduced staff. We are preparing for this scenario, and we need your support.

We plan to move as many pets as possible off premises and into [foster homes](#). This will help while we have staffing shortages as employees and volunteers are asking to self-quarantine. The virus is unpredictable and the situation can change at any given time, therefore, we are not sure how long these pets will need to be in foster homes.





Targeted Donor Outreach

You can also use your donor data to tailor fundraising appeals to certain audiences based on demographics and preferred giving channel.

Use donor data to identify:

- + Your donors' preferred giving channel.
- + Which messages resonate with your donors.
- + How often they give to your organization.

Use this data to determine the best time and giving channel to ask for another donation!





Grow Donor Relationships

Growing your relationship with donors is easy when you use donor data appropriately.

Make donors feel special when you:

- + Send personalized thank you's.
- + Send donor summaries.
- + Call donors (if you collect phone number).
- + Send a thank you gift through mail.

Thank you for bringing hope and healing to the world's forgotten poor.

Today you've made a difference, Quincy Givens.

I am deeply moved by your compassion and generosity. Thank you for your gift of \$100.00 to Mercy Ships.

Your gift helps us reach more people in Africa who suffer without healthcare—and helps save more lives by providing vital surgeries, including:

- Orthopedic
- Plastic Reconstructive
- Eye Care
- Maxillofacial
- General surgeries, and more



Track Performance of Campaigns

Use your donor data to track how fundraising campaigns are performing. Do you know your highest performing channel? How about lowest?

Utilize this data to:

- + Understand your donor's preferred giving channel.
- + Learn which messages are resonating with your donors.
- + Compare campaigns MoM, YoY, or whatever you prefer.



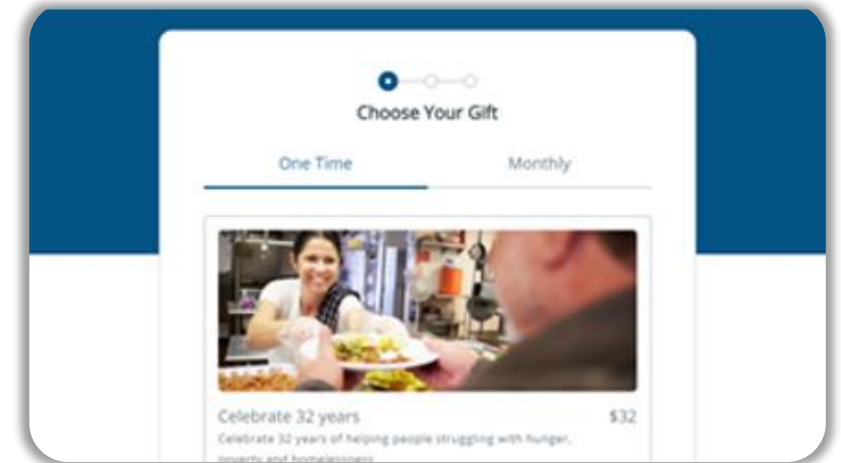
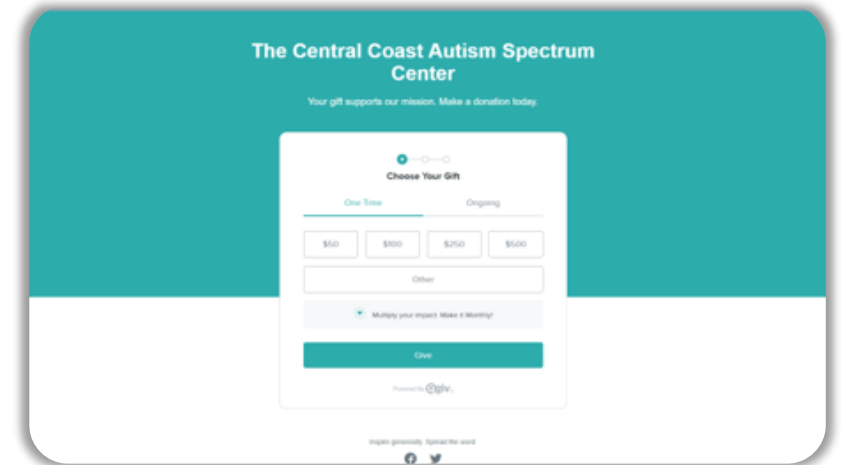


A/B Test

When updating donation forms and event forms, it's important to monitor changes to see if those changes had a positive or negative impact.

- + Did you add a new field?
- + A new image?
- + Change the landing page text?

Make sure to track performance after updates like this.





What Else?

Donor data is a wealth of knowledge and your organization can tap into this to raise more!

Donor data can help you to:

- + Identify current major donors and potential major donors.
- + Identify and re-engage lapsed donors.
- + Identify and engage at-risk donors.
- + Calculate donor lifetime value vs. donor acquisition costs

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Tools to Track and Collect Donor Information



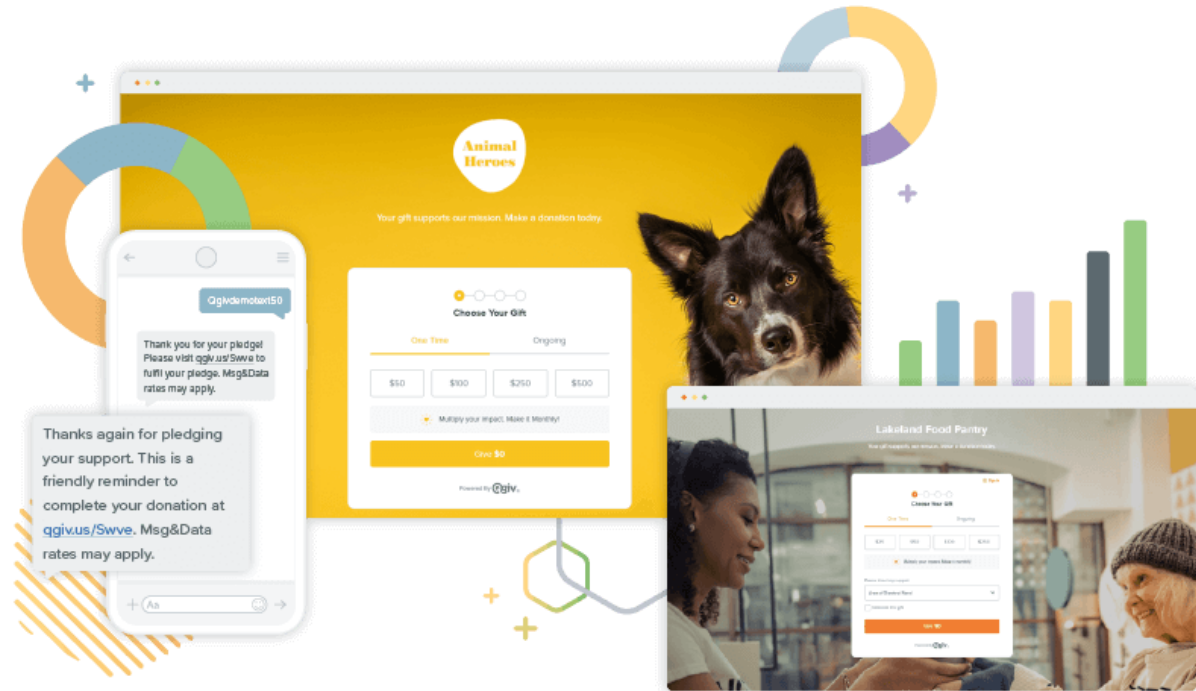
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Fundraising Tools

Fundraising tools, such as Qgiv, collect high-level data for your organization.

- + Monitor performance of fundraising campaigns and events.
- + Collect donor information through forms.
- + Track new donors, recurring donors, at-risk donors, and lapsed donors.
- + Calculate donor lifetime value and acquisition costs.





CRM Tools

Customer relationship management tools, or CRM, add extra management abilities for contacts.

- + Manage all aspects of your ecosystem including donors, volunteers, sponsors, grantees, and more.
- + Collect and add detailed information to donor records.
- + Other features like donor timelines, giving summaries, engagement scores, etc.





Other Tracking Tools

Your organization has access to a ton of other free tools to track donors!

- + Google Analytics
- + Google Tag Manager
- + Facebook Pixels
- + Google Search Console



Qgiv's Data Tools

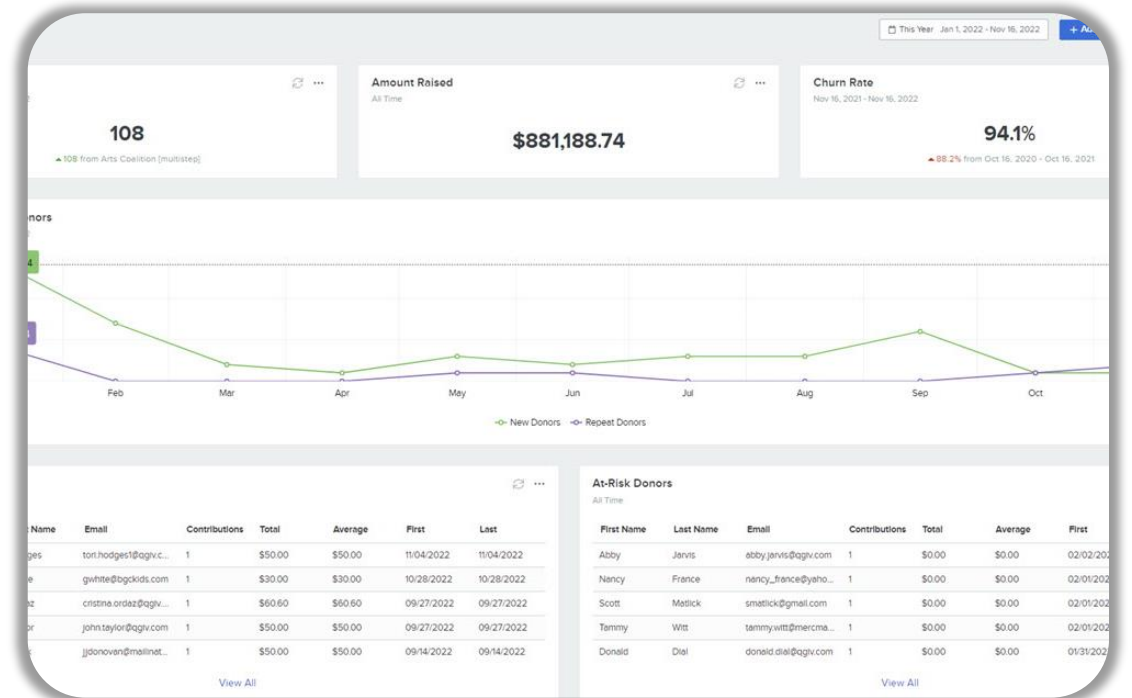


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Customizable Dashboards

- + Select from preconfigured dashboards
- + Create a dashboard from scratch from long list of data insights
- + Create and maintain dashboards for each user at your organization depending on role





Data Insights

- + 40+ data insights to choose from
- + Display data in a way that makes the most sense for your organization
- + Add or remove insights based on what data is needed at that time

Metric ?

Amount Left to be Raised ▼

Amount Left to be Raised

Amount Raised

At-Risk Donors

Auction Constituents

Auction Overview

Average Bid

Average Contribution Amount



Pre-built Reports

- + Recurring donor reporting
- + Donation and event specific reporting (Peer-to-Peer/Auction)
- + Text giving (inbound and outbound)
- + Store and badge reporting for peer-to-peer

TRANSACTION REPORTS

- Transactions**
Use this option to pull data for all processed transactions. You can filter by date and status, or use advanced filters for more specific results.
[View Report](#)
- Recurring Payments**
Use this option to pull data on all recurring entries in the system with information on start and end dates, next bill dates, payment types, etc.
[View Report](#)
- Recurring Forecast**
Use this report to view recurring payments that are expected to process in the future.
[View Report](#)
- Invoice**
Use this report to view details on fulfilled and unfulfilled invoices.
[View Report](#)

ADVANCED STATISTICS REPORTS

- New Donors**
New donors gave for the first time in the the past 3 months.
[New Donors](#)
- At-Risk Donors**
At-risk donors have given in the past, but not in the past 9 months.
[At-Risk Donors](#)
- Lapsed Donors**
Lapsed donors have given in the past, but not in the past 12 months.
[Lapsed Donors](#)



Custom Reports

- + Save complex filter sets as custom reports to save time later
- + Add, remove, and rearrange the default fields to make more sense for the data you're looking for
- + Add static fields to account for your unique needs with third-party applications
- + Change column headers
- + Build reports for specific job roles

Report Builder

Reports → Custom Reports → Transaction Summary Report

Event Report [Edit](#)

Use this custom report to pull summary data on all transactions, along with custom field data. [Edit](#)

Advanced Filtering Range: Last Month

Select Filters To Apply

[+ Add a Field](#)

- Transaction ID** Standard Field → Transaction Information → Transaction ID
- Time (ET)** Standard Field → Transaction Information → Time (ET)
- Batch Date** Standard Field → Transaction Information → Batch Date
- Deposit Date** Standard Field → Transaction Information → Deposit Date
- Status** Standard Field → Transaction Information → Status

13990492	12/02/2021	Quincey Givens
13990478	12/02/2021	Danielle Oleszkiewicz
13990466	12/02/2021	Jonathan Smith
13990442	12/02/2021	Jonathan Smith
13988767	12/02/2021	Jonathan Smith
13980646	12/01/2021	Jonathan Smith
13943244	11/30/2021	Jonathan Smith
13942855	11/30/2021	Jonathan Smith
13942437	11/30/2021	Jonathan Smith
13941953	11/30/2021	Jonathan Smith

80 Rows



Associated Info

Easily add qualifiers to your Qgiv URLs to track donation sources on the fly.

It's as easy as:

- + Choosing a qualifier
- + Adding it to the end of the base URL
- + Using that URL in newsletters, on social media, in specific QR codes, etc.



E	F	G	H	L
First Name	Last Name	Suffix	Email	Associated Info
Jennifer	Mansfield		jennifer@qgiv.com	newsletteroct22

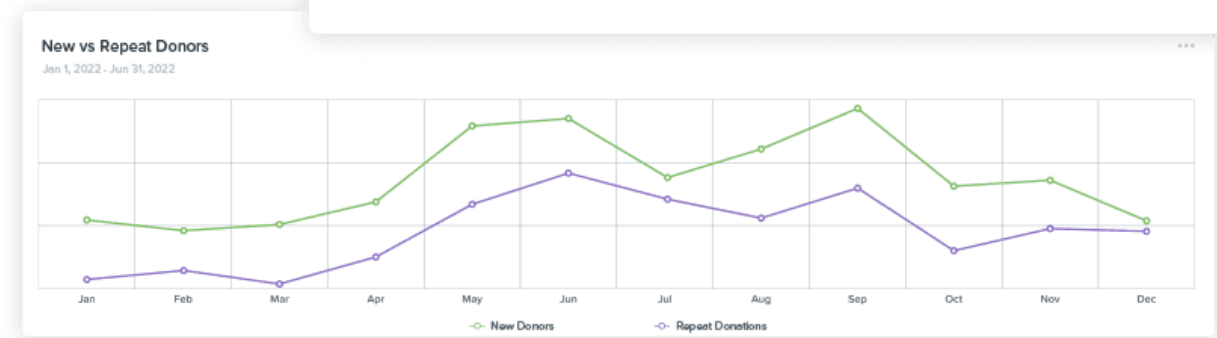
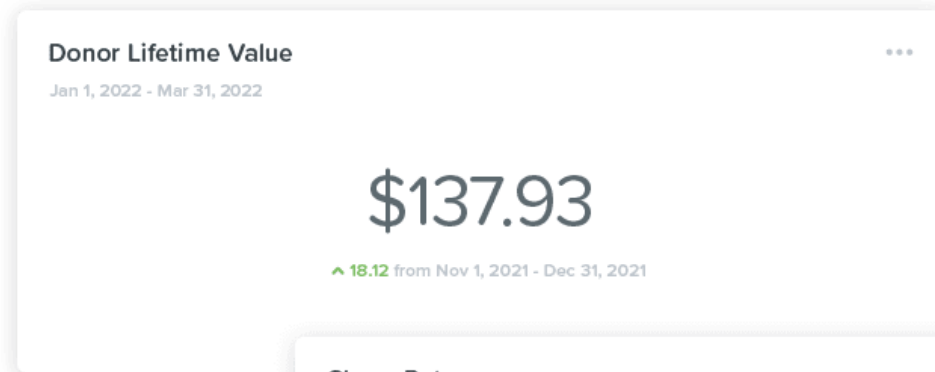


Advanced Donor Stats

+ Access to advanced statistics including:

- At-risk donors
- Churn rate
- Donor lifetime value
- Lapsed donors
- New donors
- Retention rate

+ Ability to add these insights to your Qgiv dashboards

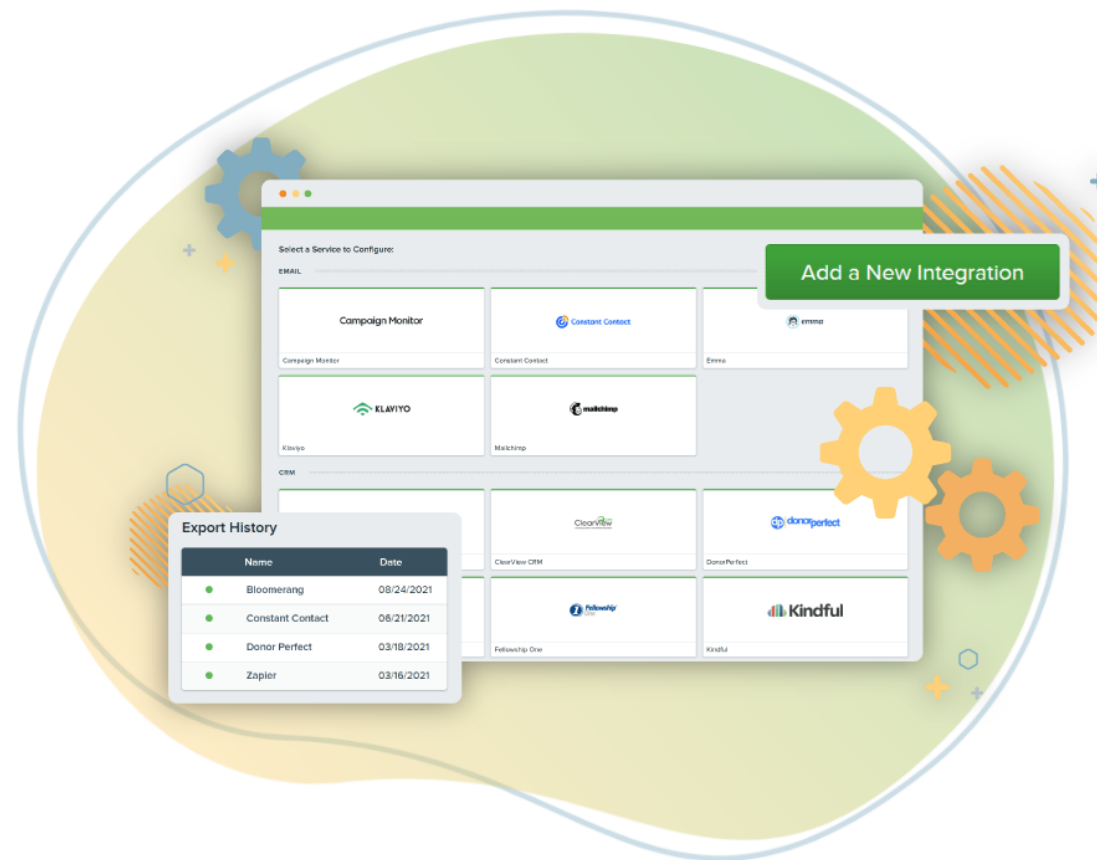


Import or Process Offline Transactions

Use our simple template to upload batches of cash and check donations to your account!

You can also take in-person gifts of cash, card, or check through the Virtual Terminal, which is helpful when you:

- + Need to take an in-person donation
- + Want to take gifts on-site at an event
- + Get a surprise donation from someone

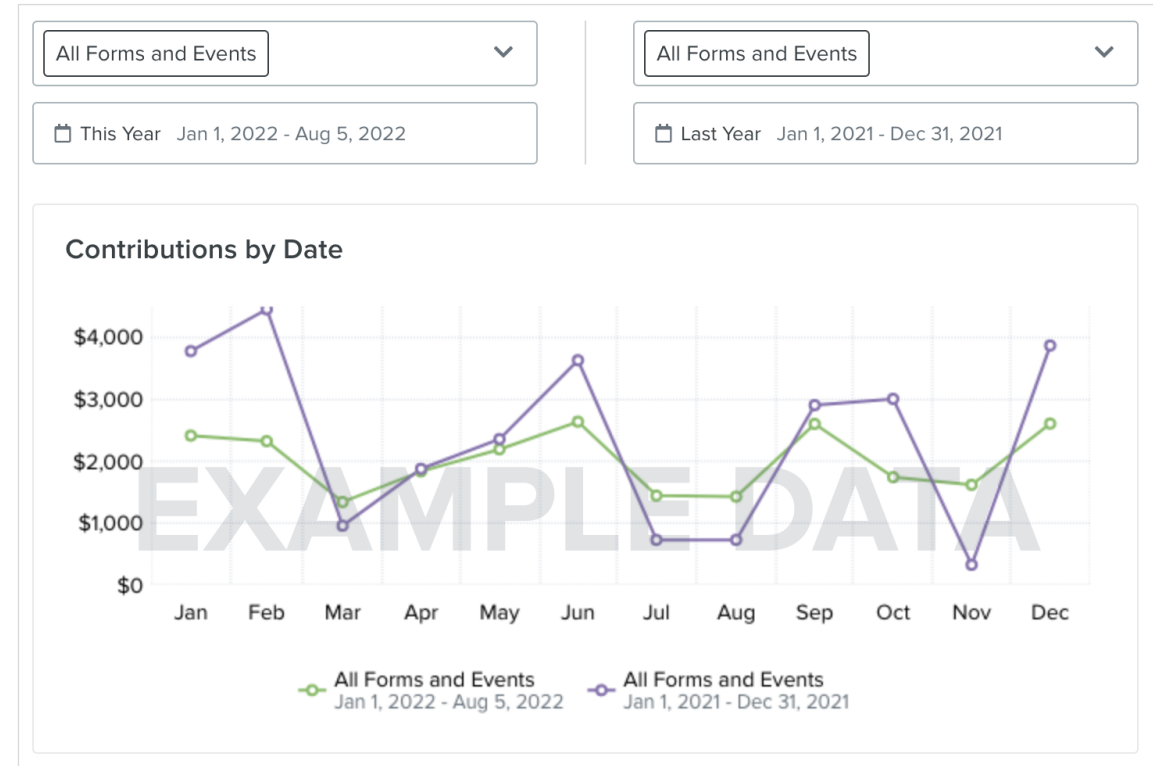




Form Comparison Tool

To compare forms, go to your organization's main dashboard and choose "Form Comparison Tool" from the drop-down.

- + Compare campaigns year-over-year
- + Compare performance of different forms
- + Run A/B tests
- + Learn what successful forms and events have in common





CRM Integrations



PREFERRED PARTNER



PREFERRED PARTNER



Raiser's Edge



eTapestry™



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+ Other Integrations



Thousands of Possibilities



Accounting Made Simple



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Have Questions?

Qgiv customers email:
support@qgiv.com

Not a Qgiv customer?:
marketing@qgiv.com

Interested in using Qgiv?
Request a demo through
qgiv.com/demo-request

Have questions about
best practices?
Visit qgiv.com/blog



Questions?



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