



# Get Tech-Ready for End-of-Year Fundraising and Beyond

Mark Becker, Founding Partner, Cathexis Partners

**October 22, 2024**



# A little housekeeping...



## ***We're recording this webinar!***

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!



## ***Feel free to ask questions!***

Use the Q&A box to ask your questions. We will have a Q&A session at the end of the presentation.

# 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.





# Put relationships at the heart of your fundraising.

Bring together the best of fundraising, volunteer, and donor relationship management with a unified giving platform! Connect with your donor community to raise more donations and build support for your world-changing work.

- + Attract new donors to support your cause and leave lasting impressions throughout their giving experience.
- + Level up your fundraising results and unlock future giving potential by unifying your donor data and tools.
- + Build meaningful relationships with deeper donor insights and time saving tools.



# Powerful Fundraising Technology + Nonprofit Service Provider

We know the value of relationships and are proud to connect you with Cathexis Partners, a member of our partner network.



We help nonprofits use technology to raise funds and engage supporters effectively and affordably.

# Meet the Speaker



## Mark Becker, Cathexis Partners

Mark founded Cathexis Partners in 2008, providing technical and consultative services to nonprofits of all sizes and all verticals. He previously served as director of IT consulting at a fundraising event production company focused on nonprofits. For more than 17 years, Mark has supported hundreds of nonprofit online fundraising efforts.

# What are you doing to gear up for EOY fundraising?

---

- When to get started
- How many communications you'll send
- What channels you'll use
- What will be your messages

*But what about how you use technology to improve your fundraising results?*

# Getting tech-ready for EOY fundraising and beyond

---

- Put your data segmentation tools to work
- Use dynamic asks
- Optimize your donation form
- Use your reporting tools
- Using AI responsibly
- Reviewing your tech stack



# Put your data segmentation tools to work

## Email marketing segmentation strategies

Here are some ways that businesses can segment their email marketing lists to get the right content in front of the right people.



ILLUSTRATION: SAMMEY/ADOBE STOCK

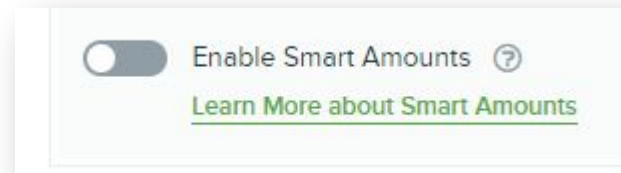
©2020 TECHTARGET. ALL RIGHTS RESERVED TechTarget

<https://www.techtarget.com/searchcustomerexperience/tip/9-strategies-for-email-marketing-segmentation>

# Use dynamic asks

---

- ❑ Use your online fundraising and CRM tools
- ❑ Automatically specify ask levels based on each donor's previous donation level



## **Qgiv's "Smart Amounts"**

Smart Amounts will intelligently determine the most likely donation amount for each potential donor based on a variety of factors

# Optimize your donation form

---

- Ask the donor to cover the transaction fee
- Add a monthly giving pop-up
- Offer a range of payment options
- Embed a matching gift tool

# Use your reporting tools

## 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](#)

### Export History

Use this report to view details on transactions that have been exported to external services through service integrations.

[View Report](#)

### Matching Gifts

Use this report to view details on matching gifts.

[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](#)

## STANDARD QGIV REPORTS

### Qgiv Registrations

Use this option to pull registrant and event donor information, along with custom event field data.

[View Report](#)

### Qgiv Donations

Use this option to pull data on all donations in the system, donor information, and custom field data.

[View Report](#)

# USE AI

- Review your content via ChatGPT or similar tools
- Create custom images using AI image generators



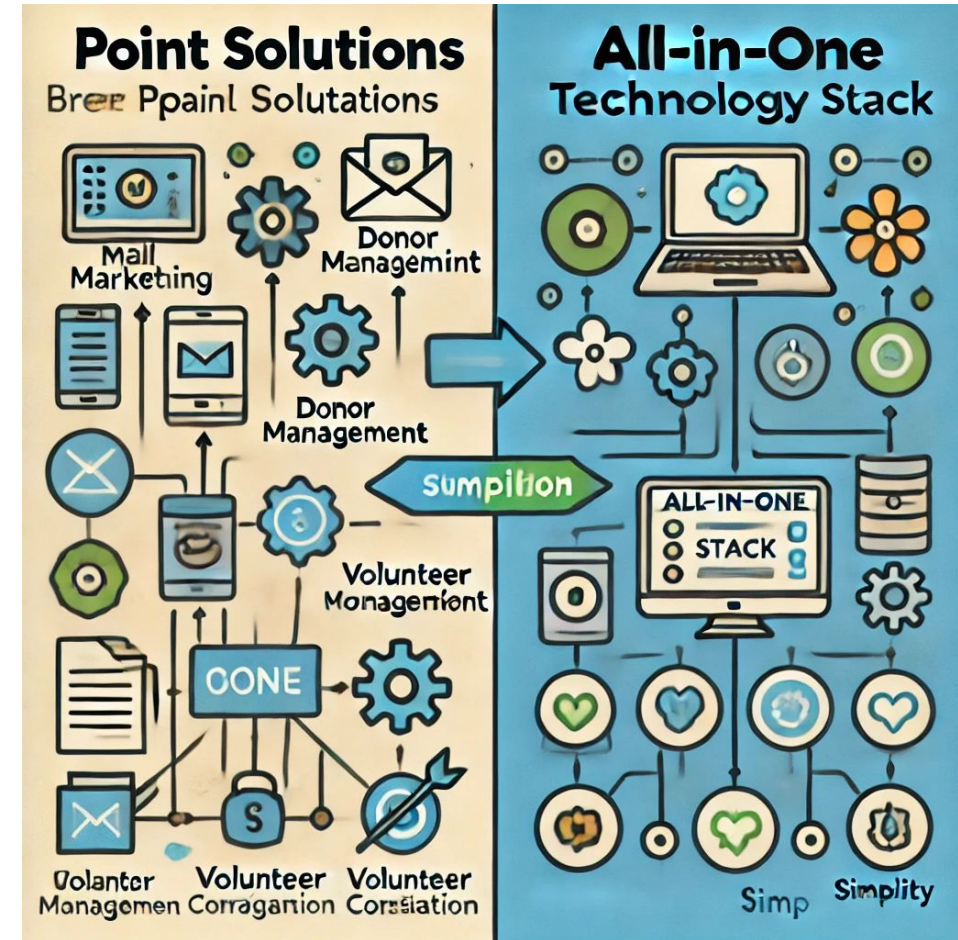
# Tech Stack Review

- Consolidated list of all technology
  - What it does
  - What your organization uses it for
  - Who is the SME (Subject Matter Expert)
  - Who manages the relationship
  - Contract details
    - Dates / contract length
    - Renewal stipulations
    - Costs



# Tech Stack Review

- Tech readiness of team
- Is the software meeting current needs?
- Does it support the 5-year growth plan?



# Innovation Budget



- If you don't have one, get one!
- To be used for new ideas
- Try, fail, try again

“Innovation is the ability to see change as an opportunity – not a threat.”

- Steve Jobs



# Resources

---



[cathexispartners.com/resources](https://cathexispartners.com/resources)

---

# Q&A

# Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

+ [contactus@qgiv.com](mailto:contactus@qgiv.com)

+ 888-855-9595

For more information on Cathexis Partners, please contact:

+ [mark@cathexispartners.com](mailto:mark@cathexispartners.com)

+ 312.613.1655



This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.