convio®
MOVE PEOPLE™

MOVES MANAGEMENT™ MADE EASY

How CRM Puts You In Sync With Your Major Donors

In today's tough economy, successfully competing for donor dollars requires cultivating strong relationships with your major giving prospects.

Moves Management™ is the set of processes nonprofits rely on to develop these constituent relationships and move them toward major giving. But simply adopting Moves Management as a strategy isn't enough. Its full potential is only realized when supported by tools that help you identify and foster the personal relationships essential to giving.

The depth and progress of your donor relationships can be significantly impacted by the efficiency and effectiveness of your fundraising tools. If you use Moves Management, Constituent Relationship Management (CRM) is the technology tool you'll need to manage those relationships. CRM goes beyond the capabilities of a donor database, working hand in hand with your organization's major gift processes to help you nurture your best prospects and move the giving process along in a way that works best for you.

Major gifts are a priority for every nonprofit, large or small. Every organization has its own approach to cultivating constituents along the continuum toward major donations.

Whatever your approach to Moves Management, the challenge probably isn't tracking the gifts once they've been given/received; it's identifying the best prospects – weeding out those with little potential and spotlighting the promising ones. These are the relationships that have the potential to result in a major gift and a deeper involvement afterwards (such as more giving, planned giving, willingness to solicit others on your behalf, participation on your board, leading capital campaigns, etc.). Having the ability to consistently identify and cultivate the most promising prospects enables your staff to nurture relationships in a way that's tactful, timely and efficient.

IF MOVES MANAGEMENT IS THE STRATEGY, CRM IS THE TOOL.

It's important to have a Moves Management approach tailored to your organization and constituents. It's also important to know that there is technology that can help you streamline your processes and save staff time and frustration. While a donor database helps manage donors, a constituent relationship management system (CRM) helps manage relationships throughout your organization while quickly and clearly identifying prospects to focus on for giving potential.

CRM solutions can even replace completely or connect seamlessly with the other programs and applications you use on a daily basis, giving you a total 360-degree view of your constituents.

CRM helps you connect more completely to your donors by giving you a full picture of their involvement with your organization, their communications preferences, and their relationships. It also supports your organization's Moves Management protocol – automating the processes you're already using and delivering meaningful reports for measurable goals – without requiring you to change your processes to fit the software.

Keith Heller
Principal
Heller Consulting

HELLER CONSULTING
your fundraising technology team

"You can only effectively carry so many prospects in your portfolio. Pursuing the wrong ones—those who might not have the financial capacity, or simply aren't very engaged with your organization—is costly. A good CRM system helps you recognize relationships you can stop pursuing, saving you valuable time and helping you avoid wasted effort. More importantly, a CRM system prevents important opportunities from falling through the cracks. It helps you identify those hidden but invaluable prospects in your portfolio that have the greatest affinity for your organization and the financial capacity to make significant contributions. CRM supports smarter, more effective fundraising."

CRM FITS YOUR MOVES MANAGEMENT PROCESS, AND HELPS YOU IMPROVE EACH STEP.

There's no one size fits all answer for how to engage in Moves Management. Developing a successful strategy requires flexibility and staff adoption, both in terms of process and technology. But one thing's for sure: your success is limited if you're forced to track relationships the way a software vendor has dictated in their product. If you're having to copy and paste emails to share with others, or use an ad hoc process that involves a lot of Excel spreadsheets, for example, the result will be missed opportunities or, at the very least, non-coordinated communication to major donors and prospects.

There's no one size fits all answer for how to engage in Moves Management. Developing a successful strategy requires flexibility and staff adoption, both in terms of process and technology.

Oftentimes, major gifts officers totally abandon the core database because it is too unwieldy or inconvenient for them (for instance, most of these staff members are constantly on the go and live in their email inboxes and mobile devices – not a database tied to their desk). At the same time, in leaving that database behind they miss out on the latest information they need, such as new gifts received, conversations that others have had with the prospect, and other ways the prospect has interacted with the organization (volunteering, events, petitions, phone inquiries, etc.). Without summary reporting, pipelines, collaboration, and tracking the history of their conversations, they're often partially blind to how donors are involved with the organization. In the end, part of the development team is using one system, and the major donor team is using another while opportunities are lost due to lack of coordination and clear communication. Avoid this scenario: work with an integrated CRM that includes donor management features instead of donor database software alone.

The best part of a modern CRM is that it can adapt to your Moves Management process (the one you already have in place). It fits into your daily activities, becoming a native and necessary part of how you work on a daily basis. It enables collaboration. It's flexible to match the strategy you're using today and yet able to evolve as your strategy changes. It's convenient, can be integrated with products like Microsoft Outlook™, and provides anytime, anywhere access from your web browser and smart phone. As a result, it helps you cultivate donors more effectively through better tracking, quicker response time to your constituents, and a better view of your constituents' relationships and activities.

CRM HELPS YOU DEVELOP STRONGER RELATIONSHIPS THAT LEAD TO LARGER GIFTS.

A CRM enables a truer understanding of how your constituents are engaged with your organization, and minimizes the tedious task of keying information into the database.

For example:

– If a prospective major donor gives online, you need to have that information quickly and with accuracy. You can't afford to wait a week or more for the external data source to update your database.
– If a prospective major donor has an email exchange with your executive director, you need to see the conversation – integration with email tools like Outlook is critical here.
– If a prospective major donor signs a petition on your website the night before your meeting, you need to know before you speak with them the next morning. Access your database remotely through a dashboard on your iPhone, browser, or receive reports via email.
– If a prospective major donor speaks with another staff member about an upcoming volunteer opportunity, you need to have access to this information so that you're aware of their interest in your programs.
– If a prospective major donor is listed on Facebook, LinkedIn, or other social or professional networking sites, your CRM can inform you of this so you can friend them and extend your relationship online.

These are just a few examples of the information you'll have quick access to with a CRM – without having to dig through sticky notes, Excel files, or multiple programs (not to mention departments).

Access major donor reports on a personalized dashboard anytime and anywhere there's Internet access.

Ultimately, Moves Management is about staff nurturing donor relationships. Methods vary from organization to organization. Some organizations favor a formal approach with detailed procedures and defined stages. For others, the process is informal. Often, not all steps along the way are recorded and not all procedures are pre-planned. You need a system that's flexible and that supports all components of Moves Management – from prospecting to cultivation to solicitation to stewardship. CRM can make all of these much easier on your staff and support more personal relationships with your constituents and prospects.

PROSPECTING

Successful prospecting (collecting information about your constituents to help identify potential major donors) requires you to be able to see all the ways individuals have engaged with your organization, from email subscription to personal communications, and give you detailed demographics and, when available, financial information. When a constituent becomes more engaged with your organization, their relationship "moves" or evolves into a more loyal commitment.

An integrated CRM captures all interactions from all staff and all channels for all constituents – in one place. Because you can track all constituents with a CRM (not just current donors) and all types of interactions, you're able to quickly identify prospective major donors based on their prior involvement and inclination to engage. Not only does this minimize data entry for your staff and save valuable time, it gives you better access to your constituents. Here's how:

First, CRM will assist you in tracking and engaging the right prospects. The system can help you identify, for example, the five major donor prospects it's critical you call this week; it can also help you decide when it's time to stop pursuing a relationship, and when you should simply be patient.

The "right" prospects for major gifts are usually based on two criteria:

1. **Ability to Give**
   Who has the financial capacity? A good CRM can track all giving history and will store wealth-screening information simply and provide easy reporting to show you who these people are.

2. **Affinity**
   How connected do they feel to your organization? CRM is uniquely suited to answer this critical question. With a full view of the many ways someone is involved with your organization, you'll be better able to identify the most likely prospects. Analyzing giving history simply isn't enough. CRM can tell you: Who attends programmatic events? Who volunteers? Who's made non-financial contributions as well as monetary gifts? Who has visited your website? In essence, who has participated in your mission and how much?

The number of "touches" a person has had with your organization, and the nature of those touches, is a strong indicator of their connection and commitment. CRM will analyze this data and identify the likelihood of a major gift – even a planned gift that you might otherwise miss. Contrary to conventional wisdom, most planned gifts don't come from major donors. The majority come from donors who have consistently given smaller gifts over many years and participated with an organization in multiple ways – as volunteers, as advocates, as beneficiaries of the mission. Who are these folks? CRM can help you find and cultivate them now.

Once the right prospects have been identified, you need to have the appropriate person contact them. CRM's robust relationship features can show you who is connected to your prospect within your organization. It may not be a gift officer. It could be a board member, an employee, a business colleague in the broader community, or someone from your program staff who has had an interaction with them (e.g., the head of the department where they volunteer). That contact might not ask them for a gift but will play a key role in the solicitation of a gift.

CRM then helps your gift officers take those relationships to a more dynamic level. For instance, you can "friend" your supporters on Facebook, LinkedIn and other social networking sites and communicate with them in the method they prefer. Because CRM systems often integrate seamlessly with email programs such as Outlook, you can record these conversations in your database easily without putting an additional burden on your staff to track every detail.

According to a groundbreaking report by Convio, *The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors*, which looked into the online habits and behaviors of major and mid-level donors, 80% of donors have given online. As your donors become more comfortable giving online, a CRM can help you use the Internet to support traditional major giving efforts.

For more information on how, download:

The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors.

In the Prospecting stage of Moves Management, CRM enables you to:

– Track all "moves" a donor makes with the organization and increase the effectiveness of each solicitation
– Identify "the right" prospects and who the best contact is
– Assign specific tasks to staff to help keep a donor moving through the stages
– Set goals and benchmarks
– Deliver meaningful reports that are tied to measurable goals

CULTIVATION & SOLICITATION

Once you've identified your prospects, CRM can keep you on task by automating the requisite assignments and notifications as you move a donor through the lifecycle of a gift. This includes all stages from cultivation to solicitation to stewardship of the gift.

Throughout the gift lifecycle, having a CRM helps you:

– Keep tasks within your Moves Management process tied to concrete and measurable goals
– Keep your strategy flexible, changing in response to donor and organization needs
– Stay informed with reports and dashboards
– Keep critical tasks top of mind by presenting reminders within the CRM and Outlook (or whichever task business applications you use)
– Track goals, pipelines and benchmarks

For many organizations, within each stage are a series of tasks assigned across your staff team. For example, in the cultivation stage a plan must be created, there's research to be completed, demographic details are double-checked, and relationships must be analyzed. Then comes solicitation, which has its own series of tasks, and so on through the full gift lifecycle.

CRM can automate much of this process, assigning relevant tasks with the appropriate timeframes as the relationship moves from one stage to the next, based on your organization's predefined process. Here's an overview of how CRM supports you throughout the process of major gifts cultivation.

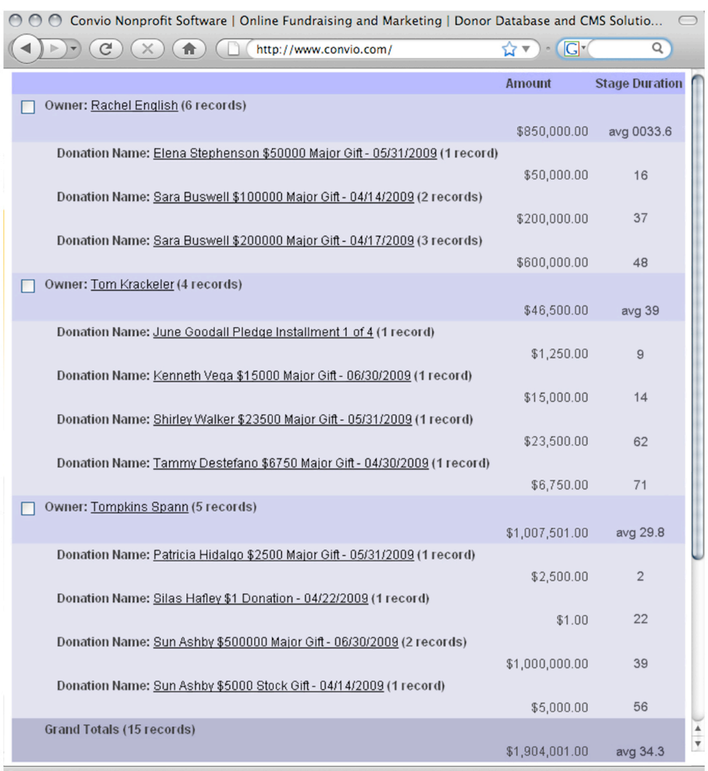
1. Supports Multi-Stage Gift Management

CRM allows for better follow-through. Automatic workflows and task assignments mean no lost time or contact opportunities slipping through the cracks.

When contact is made or a task is completed, the system will tickle your fundraisers to execute the next appropriate move. It will also keep other colleagues informed – your development director, the executive director, the board member who may be supporting the solicitation effort, perhaps the planned giving officer if they are soliciting the prospect in parallel, and the administrative assistant who will be carrying out some of the tasks in the cultivation (e.g. sending out informational packets, arranging for tours, etc). And all this is automated, so the major gifts officer doesn't have to remember to keep all the appropriate people in the loop – the CRM does that for them so they can stay focused on fundraising.

2. Helps You Collaborate And Learn What's Working

Sometimes it's more appropriate and useful to measure performance based on activity, not just results. You may want to set measurable goals that aren't just dollars. If a development director wants to know, "How are my major gifts officers spending their time?" a CRM can help answer that question by providing activity reporting, such as number of calls made to new prospects, number of "touches" with active prospects, number of proposals submitted, or number of site tours, within a requested period.



	Amount	Stage Duration
Owner: Rachel English (6 records)	$850,000.00	avg 0033.6
Donation Name: Elena Stephenson $50000 Major Gift - 05/31/2009 (1 record)	$50,000.00	16
Donation Name: Sara Buswell $100000 Major Gift - 04/14/2009 (2 records)	$200,000.00	37
Donation Name: Sara Buswell $200000 Major Gift - 04/17/2009 (3 records)	$600,000.00	48
Owner: Tom Krackeler (4 records)	$46,500.00	avg 39
Donation Name: June Goodall Pledge Installment 1 of 4 (1 record)	$1,250.00	9
Donation Name: Kenneth Vega $15000 Major Gift - 06/30/2009 (1 record)	$15,000.00	14
Donation Name: Shirley Walker $23500 Major Gift - 05/31/2009 (1 record)	$23,500.00	62
Donation Name: Tammy Destefano $6750 Major Gift - 04/30/2009 (1 record)	$6,750.00	71
Owner: Tompkins Spann (5 records)	$1,007,501.00	avg 29.8
Donation Name: Patricia Hidalgo $2500 Major Gift - 05/31/2009 (1 record)	$2,500.00	2
Donation Name: Silas Hafley $1 Donation - 04/22/2009 (1 record)	$1.00	22
Donation Name: Sun Ashby $500000 Major Gift - 06/30/2009 (2 records)	$1,000,000.00	39
Donation Name: Sun Ashby $5000 Stock Gift - 04/14/2009 (1 record)	$5,000.00	56
Grand Totals (15 records)	$1,904,001.00	avg 34.3

Additionally, these reports can help set team benchmarks and highlight the stages of your Moves Management process that need improving. A report can tell you, for instance, which of your development officers is most effective at securing gifts, so your team can learn from her process. Report on the average days it takes your officer to close a gift, even the average days at each stage. You can compare these figures vs. statistics for the other officers and share the individual "best practices" of those who have honed their techniques in specific areas.

Benchmark Your Performance: Running a simple report can tell you how long outstanding gifts have been in their current stage.

3. Keeps Your Constituents Moving Steadily Along The Relationship Continuum

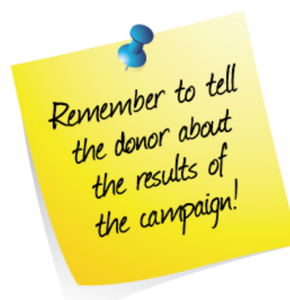
CRM's robust reporting enables you to periodically review your active prospect pool for gifts that are moving too slowly through the process, so your staff can concentrate on potentially more promising prospects.

Without CRM, this kind of strategic approach may be based on anecdotal, subjective information ("Sure seems like we've been talking to this prospect for a long time with no results…maybe we should move on.") With the historical data a CRM report can provide, and its powerful analytical tools, you may be surprised at the viability of this prospect—or confirm your suspicions. But you will now have the statistics to back it up.

STEWARDSHIP

Moves Management doesn't end when the gift is received. The key to successfully sustaining a major gift program is good stewardship. Providing frequent updates to your donors delivers the "return" on their investment – and it's the final piece that brings the relationship with major donors back around the continuum to repeat giving. CRM helps here as well. By automating the assignment of follow-up tasks, tracking relationship-building activities, and delivering enlightening reports that highlight where your staff should spend their time, CRM can help systematize your stewardship process and ensure no steps are overlooked.

While some larger organizations have staff dedicated to gift stewardship, smaller organizations with limited resources will also benefit from the efficiency CRM brings to the process. A well defined stewardship process, once implemented in CRM, takes the concept of sticky notes to a whole new level, placing all of your reminders and "to do's" into an automated series of tasks that provide timely, relevant and efficient guidance to nurture those relationships that you worked so hard to cultivate.



IN CONCLUSION: CRM SIMPLIFIES, INTEGRATES, AND IMPROVES MOVES MANAGEMENT FOR YOUR ORGANIZATION.

CRM takes the set of steps you use in major gifts fundraising and turns it into a true Moves Management process that becomes part of your daily routine. The system enables you to perform each step better and faster, helping you uncover new insights into donor relationships, performance, reporting, and automating tasks wherever possible so that you save staff time and cultivate stronger constituent relationships.

With CRM to guide you through prospecting and cultivation, you'll find you have a more comprehensive view of your donor relationships and how they are working to serve your mission. You'll be more connected to your donors, tuned into their activities and preferences and poised to deepen the relationship. Working as a team and managing your staff becomes easier as goal-setting, pipelines, benchmarks, best practices and activity reports are only a few clicks away. And finally, your gift officers will be able to use the system to access the information they need while working on the go in the style they prefer.

Whether your organization is large, medium or small, CRM will reflect your major gifts protocols while making the whole process more thorough and efficient, so that you can focus on what you do best – building relationships with your major donors.

CONVIO'S COMMON GROUND: MOVES MANAGEMENT FEATURES THAT MAKE THE DIFFERENCE

There's a lot of donor database software out there claiming to help you with Moves Management, but as we've discussed, a donor database provides only a limited view of your constituents. Here are the features that separate Common Ground from the pack of donor database options.

Relationship Tracking

Build a network of contacts and leverage known linkages to further relationships with Common Ground. Tracking all known relationships, whether between individuals or related organizations becomes critical to finding as many possible touch points and linkages to the target as possible to further the probability of getting the gift.

Email Integration

No matter what email service you're using, Common Ground can capture key correspondence at the contact level without extra hassle, allowing all staff involved in cultivating a relationship to remain "in the loop."

Social Network Integration

More and more donors have adopted Facebook, LinkedIn and similar popular tools. With third-party integration services from partners like Rapleaf, you can monitor your key constituent relationships in social networks and research affiliations to increase your results.

Gift Stage Tracking

Track the full lifecycle of each gift and customize each stage to match your process with Common Ground. This allows your team to define a methodology for gift cultivation and pipeline reporting and monitor progress through a series of defined stages.

Dashboard Reports

Follow the metrics and KPIs that are important to you via personal dashboards. Each staff person—whether they are a major gift officer or executive director—can create their own graphic reporting dashboard and automatically receive updates via email on a scheduled basis. With dashboard reporting you can monitor results without even logging in to the database.

Custom Reports

No two organizations are alike and so limited canned reports simply cannot deliver the analysis and detail each nonprofit needs. With Common Ground's step-by-step custom reports, your non-technical staff can get what they need from the database to inform their strategies in real-time without technical help.

Mobile Device Access

Whether using your iPhone, Blackberry, or Windows Mobile device, your team can look up contact details, gift history and more on the go. Be alerted if the target buys a table at the gala or other actions that you may want to know, just in time for you to walk in and request the gift.

Custom Fields

Easily create custom fields on contact and household records allowing you to store data that helps you better understand your constituents and identify prospective donors. These fields allow each organization to apply the best approach – or your approach (versus a software vendor's approach). The flexibility to add fields, change labels, etc. helps Common Ground fit into your strategy.

Automated Workflow

Automatically assign tasks and trigger email notifications based on changes in the database. Workflows can be used to notify a major gift officer or executive director when a prospective donor record has been modified in some way. They can also be notified when a major gift stage shifts or when efforts have stalled. Every field in the database can trigger a workflow, so no matter what process you define, Common Ground works with you.

READY TO SEE CRM IN ACTION?

The following scenarios illustrate how CRM can power the Moves Management processes of small, medium, and large organizations. These organizations use Convio's Common Ground as their Moves Management CRM solution to support their efforts at every step toward prospecting and cultivating relationships with major donors.

Small Organization – "A Helping Hand For Animals"

A Helping Hand for Animals has just begun to implement a Moves Management process. They plan to evolve this process over time, once they have more experience testing what works and what's feasible. They know that their CRM can support a far more complex implementation, but they are starting simple. Here's a story about how they operate Moves Management using Convio's CRM, Common Ground, as their technology tool.

1. Janice discovered that Frida Fortunate, a well-known local author, has subscribed to their email list and recently made a donation online. She discovered this by viewing a report of recent donations that had been automatically emailed to her the night before.
2. Janice calls Frida to personally thank her for the gift and logs her call notes in the CRM.
3. Before she contacts Frida, Janice performs a few tasks and adds her findings to the database. Here's what she does:
    - Janice emails her board to find out if anyone has a personal relationship with Frida. It turns out board member Betty knows Frida through another friend, so Janice tracks these relationships in Common Ground.
    - Janice visits Wikipedia to gather some demographic details about Frida, notes her birthday in the database, and sets up a recurring event with a reminder to notify her each year one week before her birthday.
    - Janice also learns that Frida was cited in the annual report of a partner organization, so Janice takes note of the contribution amount and sets her target ask appropriately.
4. Janice is now able to leverage existing relationships to be introduced and cultivate a relationship with Frida.
5. Janice has decided to solicit Frida for a gift to her organization's capital campaign.
6. As the relationship evolves, Janice makes sure to record all notable interactions in the database, especially emails exchanged by using the Outlook integration feature that makes it easy to capture emails without any extra effort on her part.

7. Since Janice is developing multiple similar prospective donors, she's able to monitor all activity of changes made by other staff by receiving a weekly scheduled report that lists any changes or activities recorded on each prospective major donor.

Medium Organization – "Charity Corps"

Over the years, Charity Corps has been able to compile a substantial amount of information on its constituents; however, the data is not currently helping to inform their major gifts program, so they have decided to use their CRM to highlight prospective donors. Here's what they do:

1. William has a meeting with his major gifts team tomorrow to identify prospective donors. In preparation he creates one report that informs his team on the best potential donors; this report indicates their donation capacity, readiness and inclination to give.
2. To determine capacity, he first creates a report that details all existing donors who have given > 5x in their lifetime with a total lifetime amount greater than $500.
3. For readiness, he then excludes all donors who have recently given more than $1000 in the past 6 months.
4. And for inclination, he limits the results to only those individuals who have participated in at least one of several campaigns in the last 12 months.
5. Armed with this intel, William is able to create a report that details the top prospects within his existing database and conduct a productive meeting with his team.
6. In the meeting the team assigns values to each of the top prospects for inclination, readiness and capacity, and William imports these values in to the database, appending the information to each prospect's record respectively.
7. The next step for William is to delegate some research tasks in the database to different team members and monitor their progress week by week using a dashboard report.

Large Organization – "Unity International"

Unity International has a team of full and part-time major gift officers who are measured to a quota and must forecast donation revenue using pipeline reporting. For this large team it is important that management is able to keep a pulse on their efforts and analyze trends across the team to help improve results. To do this, Unity International has implemented the custom forecasting features of Common Ground.

These features allow the management team to:

1. Assign quotas on a fiscal quarter basis to individual team members by analyzing prior term results
2. Monitor pipeline progress on gift opportunities with confident probability

3. Evaluate the stage duration of gifts at a macro level and provide additional support to move gifts from one stage to another

These features allow team members to:

1. Easily monitor all activities, tasks, correspondence and probability at an individual gift level while aggregating statistics for their own analysis
2. Override default stage probability ratings on an individual gift based on personal knowledge of the situation
3. Receive daily or weekly pipeline dashboard reports showing progress and outstanding tasks

About Heller Consulting

Heller Consulting helps fundraising professionals achieve greater results with less effort by optimizing their use of fundraising technology and streamlining development operations for maximum efficiency and efficacy. Since 1996, Heller Consulting has served over 600 non-profit clients with more than 1,200 projects. Their clients include hospital foundations, universities, human & social service agencies, independent schools, advocacy organizations and cultural institutions across the country.

Special thanks to Keith Heller (Principal, Heller Consulting) for his contributions to this guide.

About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.