

Including relationship fundraising in core CRM requirements

Connecting Up
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Intro

- ▶ Professional experience
- ▶ FundraisingForce
- ▶ Fundraising strategy
- ▶ Technology
- ▶ CRM searches
- ▶ CRM implementations



Agenda

- ▶ Relationship Fundraising defined
- ▶ Why care about relationship fundraising requirements?
- ▶ What are the requirements of relationship fundraising?
- ▶ How do we gather such requirements?
- ▶ Questions

Thank You

Poll

- ▶ Are you in the market for new technology?

Poll

- ▶ Does your organisation fundraise in the major gifts, bequests, trusts and foundations and corporate spaces?

Product Agnostic

- ▶ Independence
- ▶ FundraisingForce do not endorse any technology
- ▶ Product agnostic

Relationship Fundraising

- ▶ Major Gifts
- ▶ Bequests/Gifts in Wills
- ▶ Trusts and foundations
- ▶ Corporate Fundraising/Corporate Partnerships

Why Care

- ▶ Technology is not just for mass audiences
- ▶ Home for learnings from prospect research
- ▶ Moves/pipeline management
- ▶ Stewardship tools

Why Care

- ▶ Often times the step-child of requirements
- ▶ More often forgotten than remembered

Requirements

24	HVM.1.13	CRM must track pledges, pledge schedules, and pledge payments	Essential	I				
25	HVM.1.14	CRM must be able to automatically generate pledge updates and reminders for donors engaged in a multi-year pledge	Essential	I				
26	HVM.1.15	CRM must integrate with Outlook (Office 365) so we can automatically upload correspondence to CRM	Essential	I				
27	HVM.1.17	CRM must be able to capture prospect ratings (e.g. Linkage / Interest / Ability)	Essential	I				
	HV	High Value Fundraising						
28	HVB.2	Bequests						
		Ability to track bequest stages, which are separate from major gifts moves management stages.						
29	HV	High Value Fundraising						
30	HVC4	Corporate Partnerships						
	HVC.4.1	Ability to track Gifts in Kind as a specific gift type	Essential	I				
	HVC.4.2	Ability to track unlimited parent company and subsidiaries. Ability to easily show the hierarchy	Essential	I				
31	HVC.4.3	Ability to track various contacts at a corporation, including type of contact	Essential	I				
32	HVC.4.4	Ability to track a multi-stage moves management system for corporates, which may include: Cultivation; Solicitation; Invoicing; Deliverables	Essential	I				
33	HV	Key Relationships						
	HVS.5	Stewardship						
34	HVS.5.1	Trigger reminders for stewardship steps to inform the relationship manager of necessary phone calls or other contact	Essential	I				
35	HVS.5.2	Ability to track various deliverables for a funder once the donation has been realised, i.e. recognition deliverables	Essential	I				
	HVS.5.3	Ability to track recognition requirements at the gift level	Essential	I				
36	HVS.5.4	Ability to track stewardship events a donor has been invited to/attended	Essential	I				
	HVB.2.4	Ability to create a household / conjoined record that houses both an "Estate of deceased" record, that sits neatly alongside the deceased donor's record. Objective is the data from both "Estate of" and deceased "donor" record can be accessed and analysed together, but can be clearly a separate "entity" from each other (as they are legally)	Essential	I				
37	HVB.2.5	Constituency to show person is a bequest confirmed constituent, intending, considering, VIP GiW prospect	Essential	I				
38	HVB.2.6	Ability to create a prospect plan for donors	Desired	II				
39	HVM.1.12	CRM has ability to capture external relationships and assign to internal parties (e.g. a relationship manager based prospect)	Essential	I				

How to

- ▶ Involve seasoned fundraiser who deals with high value audiences
- ▶ Involve a consultant who has expertise in this area
- ▶ Consider requirements about 1:1 relationships rather than mass audiences




Questions?

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