



Simple Tips to Get the Most Out of Your Donor Data

Tiara Stephan, Product Marketing
Coordinator, Qgiv

October 23rd, 2024



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.

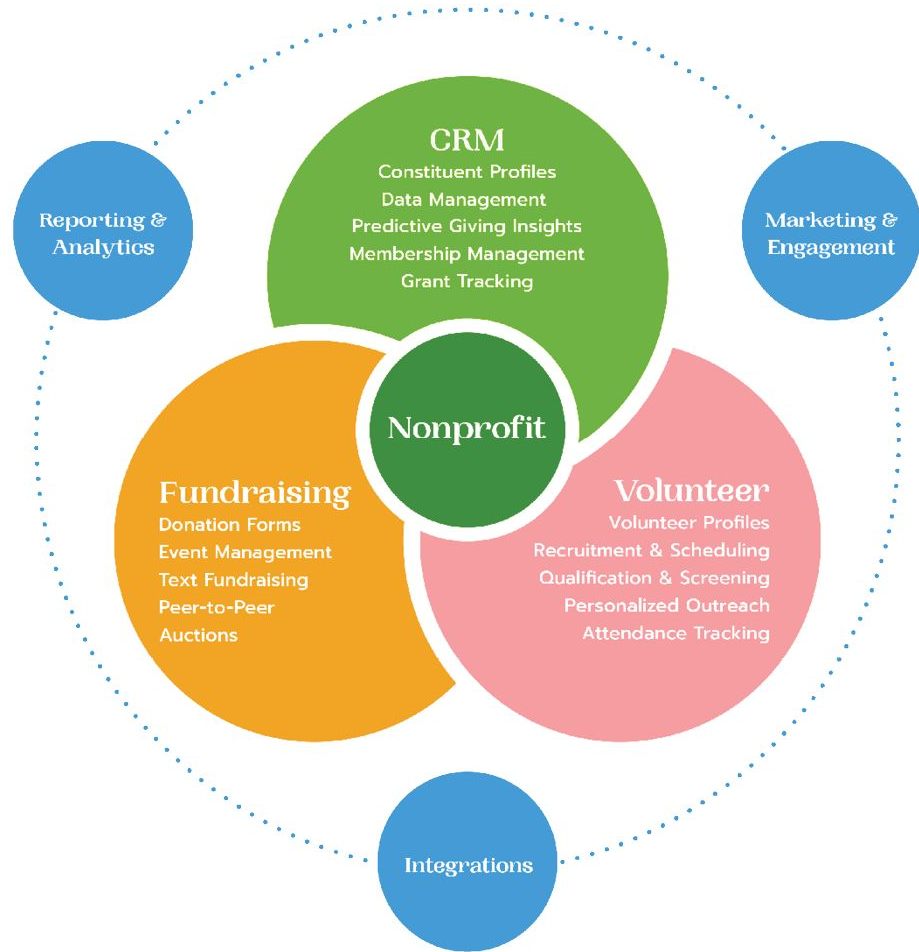


GIVING PLATFORM

Connections that maximize impact

Bring together the best in donor management, fundraising, and volunteer management to:

- + Connect data, external tools, and teams
- + Insights that lead to better results
- + Automate & simplify your day-to-day
- + Attract new supporters
- + Increase fundraising revenue



Meet the Speaker



Tiara Stephan, Product Marketing Coordinator

- + With Qgiv for 3 years!
- + I love researching fundraising best practices and helping nonprofits level up their fundraising game.
- + You can often find me at a concert, watching movies, playing trivia, or hanging out with my dog!

Unlock the Power of Data



Data Leads to Better Fundraising

DATA



1. Monitor performance of fundraising campaigns and events.
2. Make better fundraising decisions with strategies backed by data.
3. Improve relationships with your donors

Data Tells a Story

1. Data is full of untapped potential, but when left organized, it can feel overwhelming.
2. By organizing your data, you uncover patterns and insights that reveal donor behavior and preferences.
3. Data tells the story of your donor relationships, and how that shapes their engagement with your organization

DATA



SORTED



ARRANGED



PRESENTED VISUALLY



EXPLAINED WITH A STORY



What Are We Covering Today?

Wednesday, October 23rd

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

1. What data you need be looking at
2. How to use data to improve your fundraising
3. How Bloomerang + Qgiv can help you manage data
4. Tips to help you manage data

Our Journey



Building Our Data House



Visualize Potential: The Absence of 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.

Lay the Foundation: Establish Data Systems

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:

1. Fundraising software and a nonprofit CRM
2. Tracking platforms like Google Analytics and Facebook Pixel
3. Data policies and procedures

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



Frame the Picture: 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 payment method

Organize Your Data

The next step in our story is to transform your raw data into a structured, easy-to-understand format.

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



Complete the Vision: Add 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:

1. What appeals/invites did we send out?
2. Which channels did we send these?
3. What was our messaging?
4. Which audience did we target?

Analyze the performance of each!

Our Data Story



Manage data 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 complete your data story.

Deepen Your Donor Insights

Elevate your organization's strategic approach by understanding key donor metrics. This will help your organization dive into your donor's giving patterns and help you build deeper donor relationships.

1. Supporter engagement
2. Generosity
3. Donor retention rate
4. Donor levels



How to Use This Data to Improve Your Fundraising

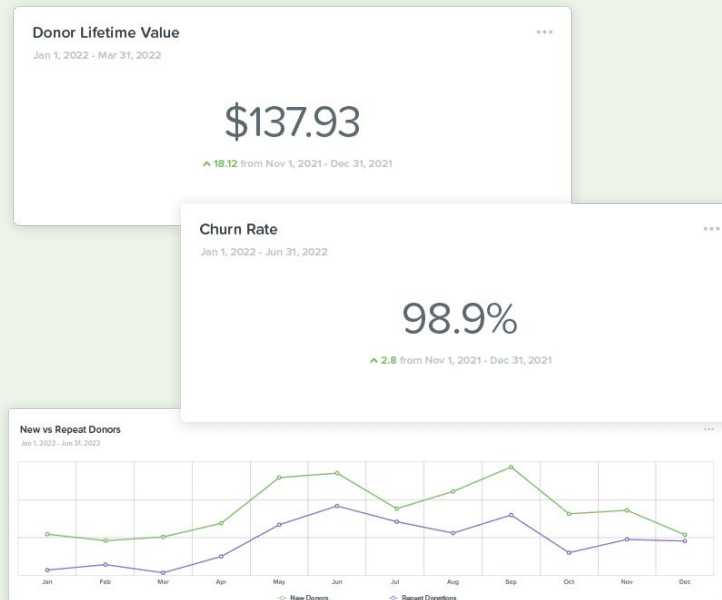


Optimize Campaigns

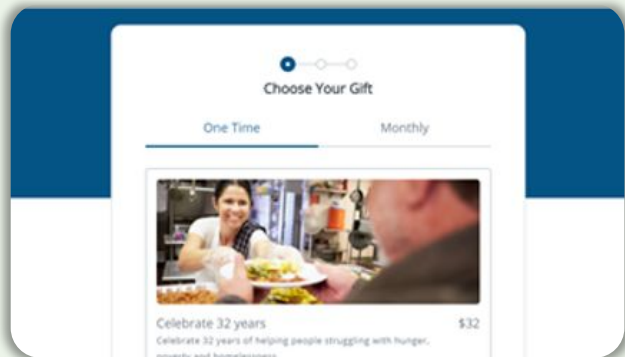
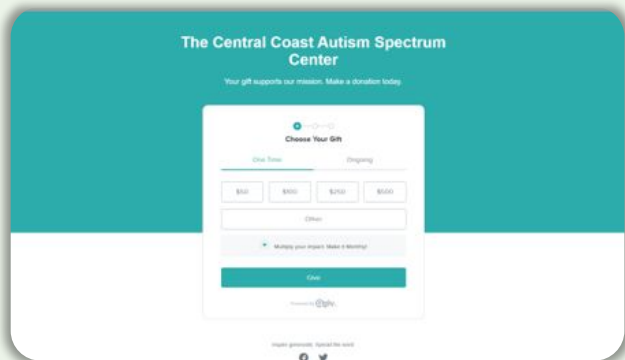
Use your donor data to track how fundraising campaigns are performing. Do you know your highest performing channel? How about lowest?

Utilize this data to:

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



Refine Messaging



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

1. Did you add a new field?
2. A new image?
3. Change the landing page text?

Make sure to track performance after updates like this.

Fine-Tune Segmentation

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.

1. Send targeted appeals to:
2. One-time donors vs. recurring donors
3. Past event attendees vs. new attendees
4. 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.



Personalized Outreach

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

1. Use donor data to identify:
2. Your donors' preferred giving channel.
3. Which messages resonate with your donors.
4. How often they give to your organization.

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



Strengthen Donor Relationships



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

Make donors feel special when you:

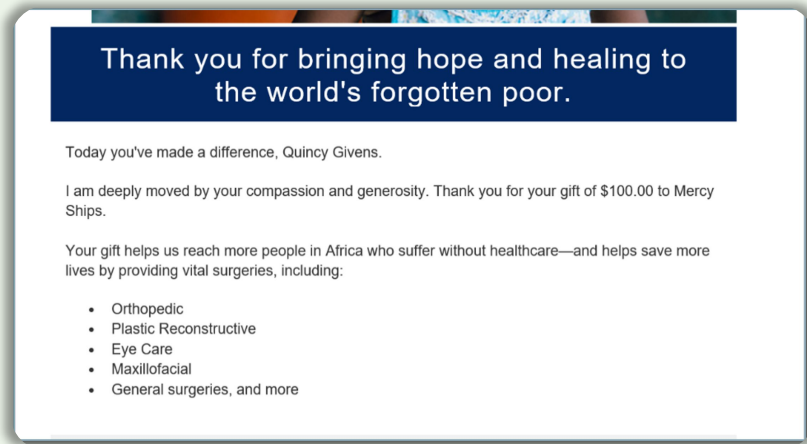
1. Send personalized thank you's.
2. Send donor summaries.
3. Call donors (if you collect phone number).
4. Send a thank you gift through mail.

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:

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

A white rectangular card with a dark blue header and a list of surgical services. The header contains the text 'Thank you for bringing hope and healing to the world's forgotten poor.' Below the header, the text reads 'Today you've made a difference, Quincy Givens.' followed by 'I am deeply moved by your compassion and generosity. Thank you for your gift of \$100.00 to Mercy Ships.' and 'Your gift helps us reach more people in Africa who suffer without healthcare—and helps save more lives by providing vital surgeries, including:'. A bulleted list follows: '• Orthopedic', '• Plastic Reconstructive', '• Eye Care', '• Maxillofacial', and '• General surgeries, and more'.

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

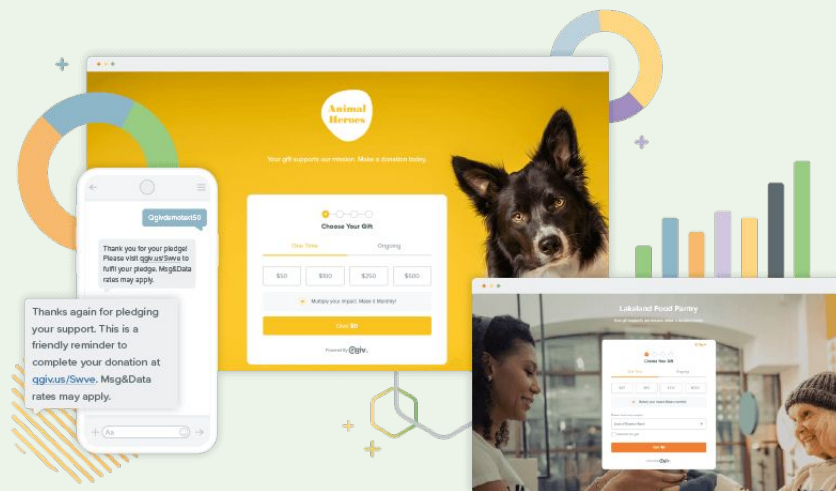
Master Your Data Management



Fundraising Solutions

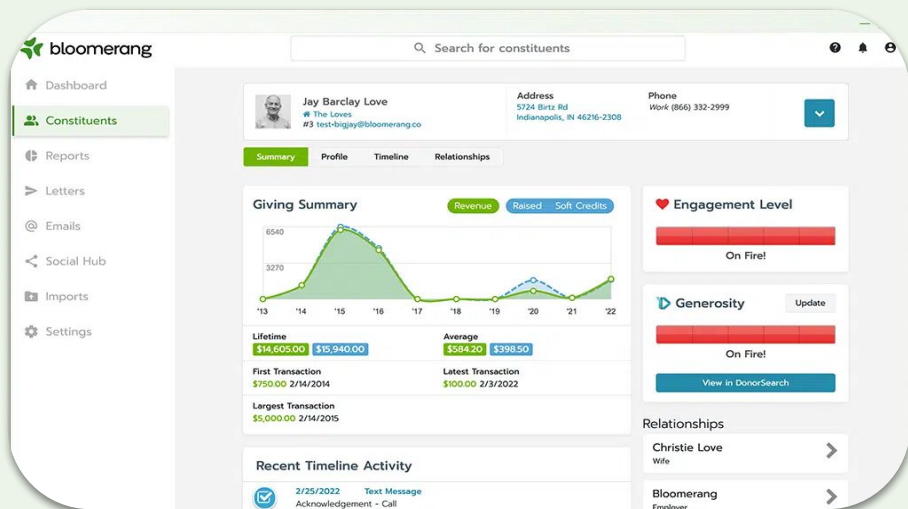
Fundraising tools, such as Qgiv, collect high-level data for your organization.

1. Monitor performance of fundraising campaigns and events.
2. Collect donor information through forms.
3. Track movement through the donor lifecycle (new, recurring, at-risk, lapsed).
4. Calculate donor lifetime value and acquisition costs.



Nonprofit CRMs

Nonprofit CRMs, like Bloomerang, unlock the full potential of your nonprofit's data and elevate your fundraising efforts.



1. Manage all aspects of your ecosystem.
2. Collect and enrich detailed supporter data.
3. Achieve a comprehensive view of supporters' journeys.
4. Make informed decisions and foster deeper community connections.
5. Transform data into actionable insights to drive impactful results.

Other Tracking Tools

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

1. Google Analytics
2. Google Tag Manager
3. Facebook Pixels
4. Google Search Console

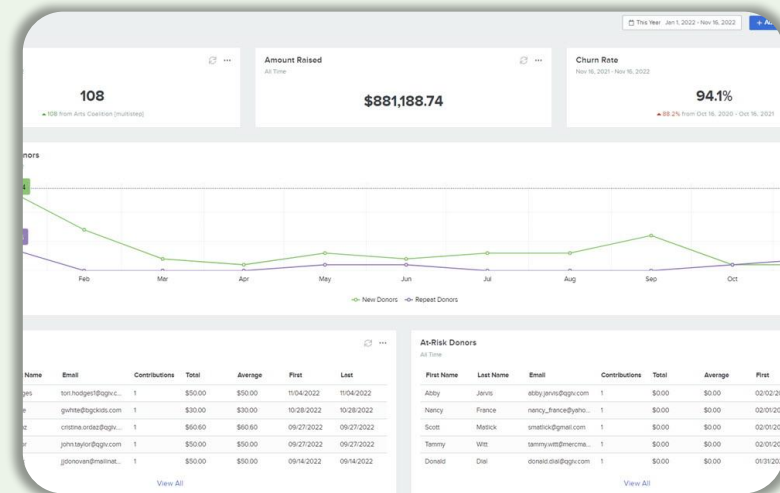


Qgiv's Data Tools



Customizable Dashboards

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



Data Insights

Metric ?

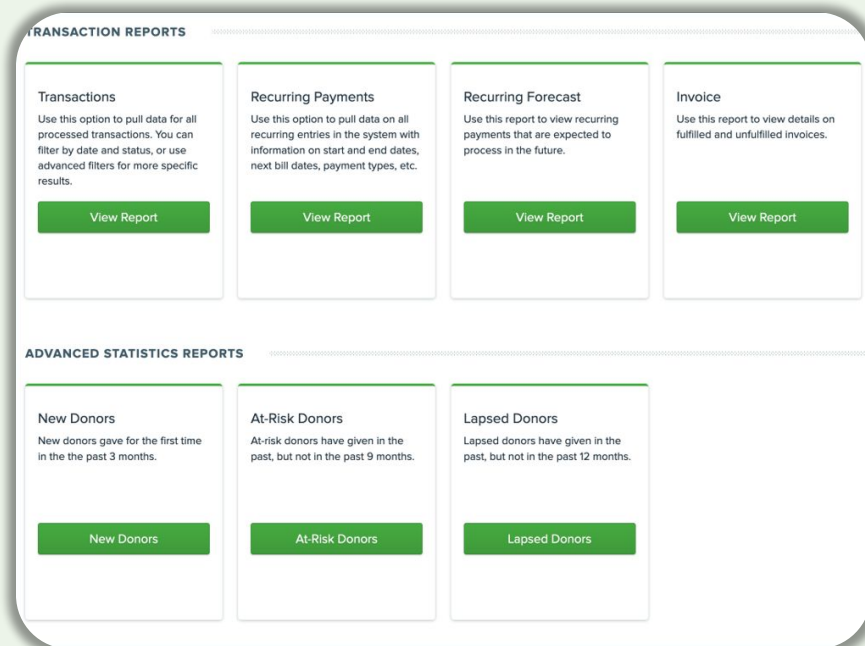
Amount Left to be Raised ▼

- Amount Left to be Raised
- Amount Raised
- At-Risk Donors
- Auction Constituents
- Auction Overview
- Average Bid
- Average Contribution Amount

1. 40+ data insights to choose from
2. Display data in a way that makes the most sense for your organization
3. Add or remove insights based on what data is needed at that time

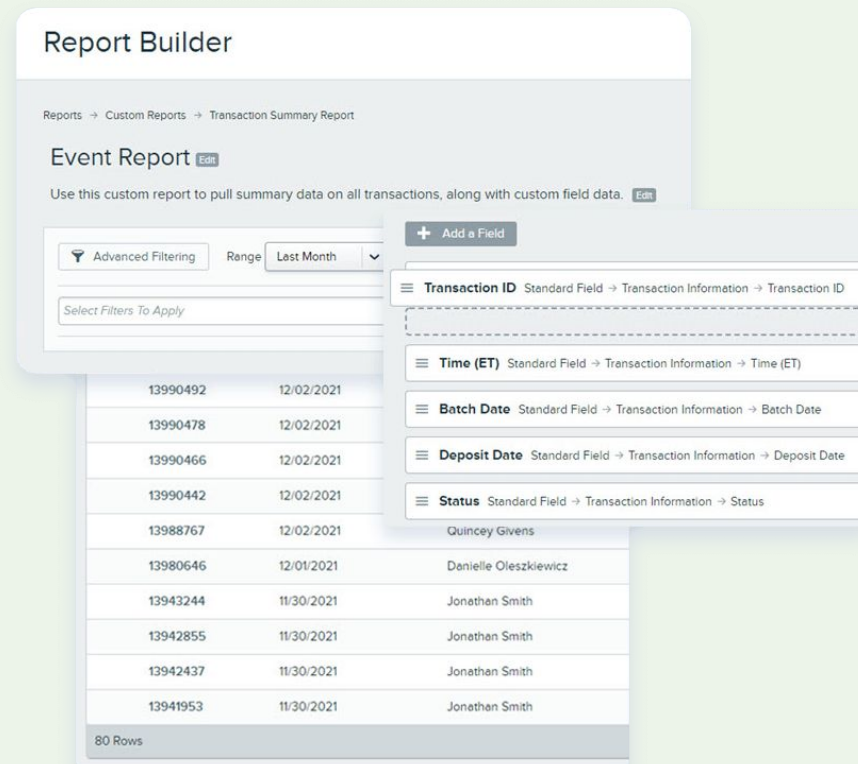
Pre-built Reports

1. Recurring donor reporting
2. Donation and event specific reporting (Peer-to-Peer/Auction)
3. Text giving (inbound and outbound)
4. Store and badge reporting for peer-to-peer



Custom Reports

1. Save complex filter sets as custom reports to save time later
2. Add, remove, and rearrange the default fields to make more sense for the data you're looking for
3. Add static fields to account for your unique needs with third-party applications
4. Change column headers
5. 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

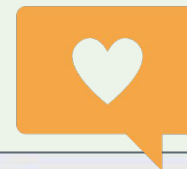
80 Rows

Associated Info

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

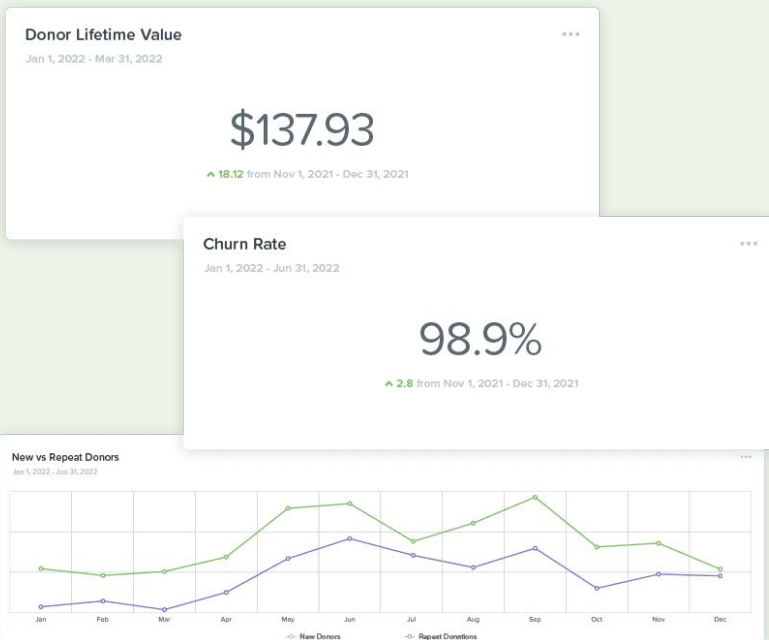
It's as easy as:

1. Choosing a qualifier
2. Adding it to the end of the base URL
3. 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:

1. At-risk donors
2. Churn rate
3. Donor lifetime value
4. Lapsed donors
5. New donors
6. Retention rate

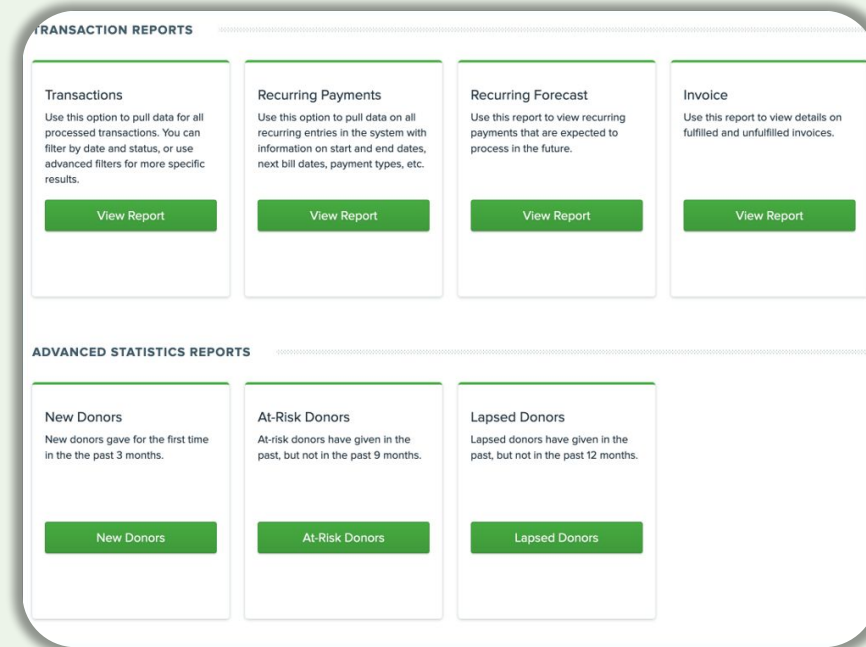
Ability to add these insights to your Qgiv dashboards

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:

1. Need to take an in-person donation
2. Want to take gifts on-site at an event
3. Get a surprise donation from someone



The screenshot displays the Qgiv reporting interface, divided into two main sections: TRANSACTION REPORTS and ADVANCED STATISTICS REPORTS.

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](#)

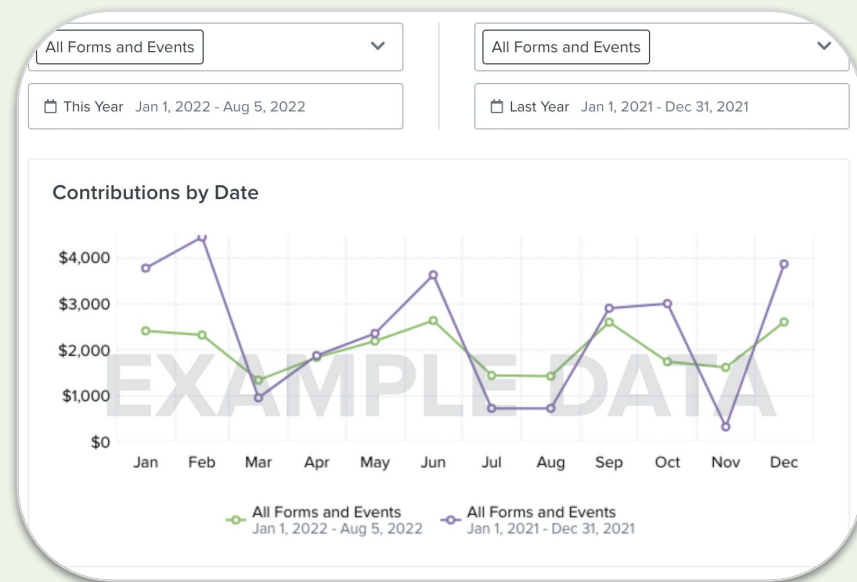
ADVANCED STATISTICS REPORTS

- New Donors**: New donors gave for the first time in the 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](#)

Form Comparison Tool

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

1. Compare campaigns year-over-year
2. Compare performance of different forms
3. Run A/B tests
4. Learn what successful forms and events have in common





Bloomerang + Qgiv Integration

Seamlessly sync Qgiv fundraising data with Bloomerang so you can focus on acquiring new donors and cultivating long-term donor relationships.

- + Automate your data flow with hourly and daily sync options
- + Get set up quickly with robust, out-of-the-box field mappings
- + Customize your data sync for additional data control

Other Integrations

CRMs



Raiser's Edge

Raiser's Edge NXT™



EMAIL



PAYMENT SOLUTIONS



venmo



OTHER



zapier



MatchPro
BY DOUBLE THE DONATION



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

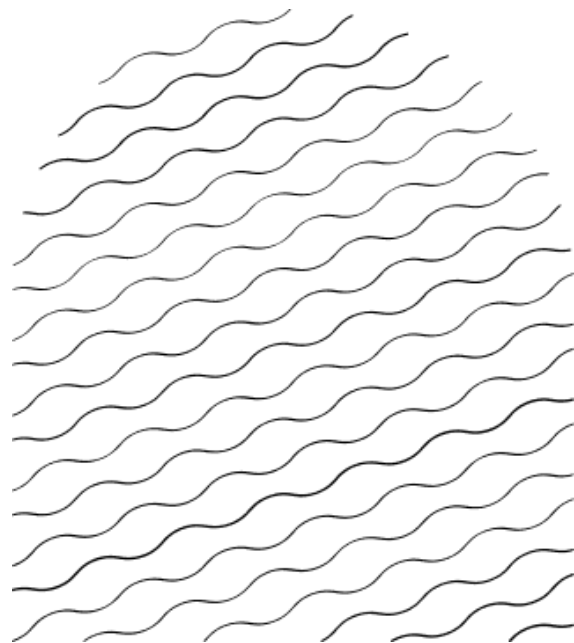
Have questions about best practices?

Visit qgiv.com/blog



Questions?





Thank You