What Can CiviCRM Do For You?

Maximizing the contributions of your constituents

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What is CRM?

How do we use it to maximize “contributions” from constituents?
Constituent Relationship Management can be defined as the data, processes, and information technology systems that collectively are used for appropriately nurturing the relationships between your organization and those who interact with it.
CRM = Data + Technology + Process
CRM Success

Organizational Success
What does CRM Success look like?
CRM Success → Add Educated User

Data

Technology

Process
Data – what you store

Process – how you get it and what you do with it

Technology – what you use to do that
Many times, what feels like a technology problem is really a lack of clarity around data or process.
So to make sure you have success with your CRM, make sure you are clear about your data needs and your processes / workflows.
Now that we know what CRM is →

Maximize the “contributions” of your constituents
Continuum of Engagement

How likely are you to move the majority of your donors from one side to the other all at once?
Continuum of Engagement

How many of you make the same asks of these two people throughout the year?
Continuum of Engagement

Least Engaged

$25 Donor

Most Engaged

$25,000 Donor

What is a better strategy?
Continuum of Engagement

Has opened last five emails, maybe clicked - but never given a gift

Least Engaged

Most Engaged

What’s the next step?

How do you get the first gift?
Continuum of Engagement

Has opened last five emails, maybe clicked - but never given a gift

Can you run this query in Civi?

Is it harder if your email data and your giving data are in two different systems?
What are some of the discrete steps along the continuum of engagement for your constituents?

Examples?
Now that you are thinking about moving constituents along the continuum of engagement, take another step.
When you want something from a constituent (donor, volunteer, sponsor, board member, etc...) what do you do?
Give them something. What do you give them? An opportunity to participate in your mission.
Always be thinking about the next opportunity to give them to move them along the continuum.
Sign up for a newsletter?

Give them an opportunity to donate.
Make a gift?

Give them an opportunity to register for an event.
Register for an event?

Give them an opportunity to volunteer.
Every time they take one step along the continuum, invite them to take the next step.

Use thank you pages strategically.
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