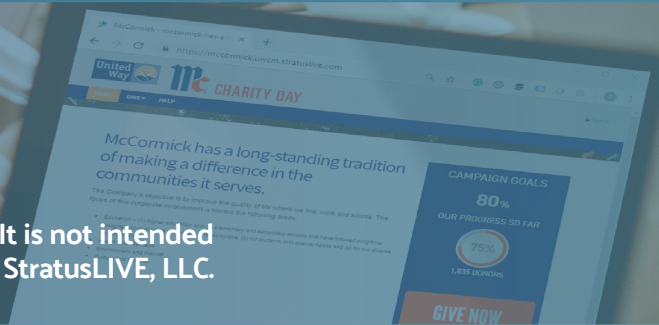




5 KEYS TO TRANSFORM DONOR EXPERIENCES

StratusLIVE

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Agenda

- Introductions
- Who is StratusLIVE?
- 5 Keys to Transform Donor Experiences at your United Way
- Client Success Story
- StratusLIVE 365 CRM Demonstration
- Questions and Discussion



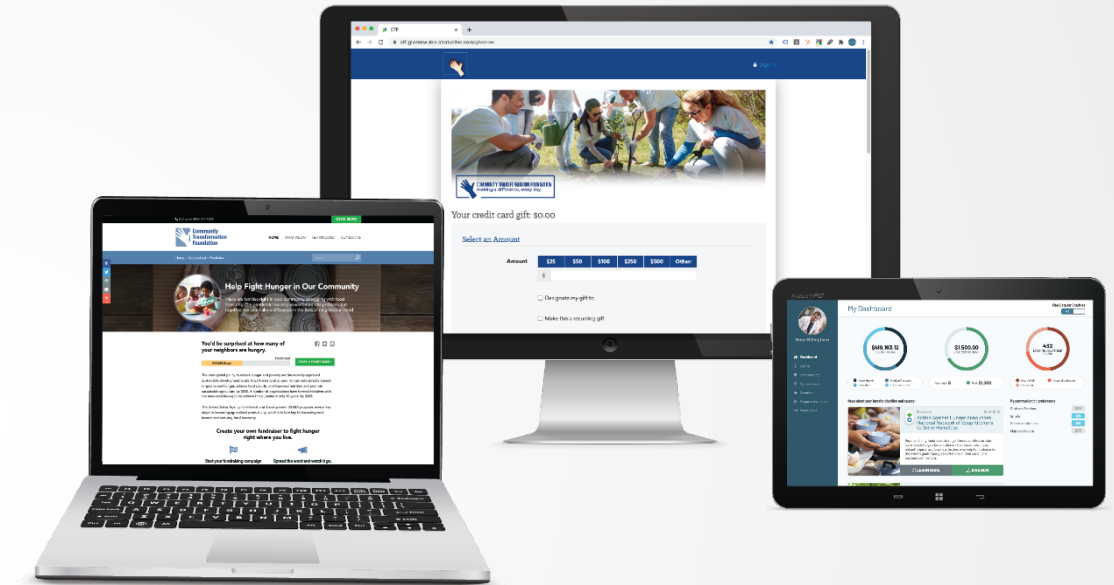
WHO IS STRATUSLIVE?

Debbie Snyder, Group Vice President, Marketing

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StratusLIVE 365 CRM

StratusLIVE Ignite Online Giving



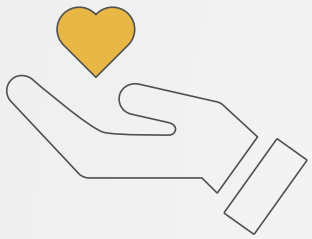
100%
Successful
Implementations

Built on the powerful
**Microsoft
Dynamics 365**
platform

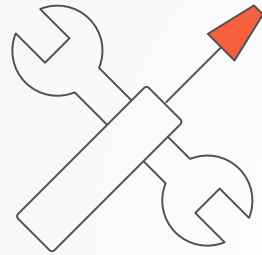
**Give at Work
Give Now
Give in Teams
Give with Friends**

**Volunteer Now
Events
Donor Hub
CRM Integration Services**

Why StratusLIVE?



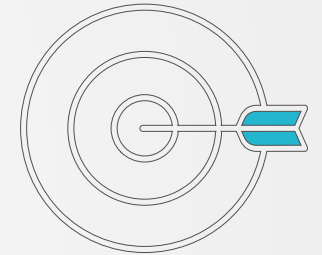
Understand
United Ways
Operationally



Full Purpose-Built
Solution for United
Ways on the
Microsoft Platform



Real Time
Reporting,
Analytics and
Data
Availability



Success Replacing
Legacy Enterprise
Systems

High Impact Organizations

Partner with StratusLIVE to engage with their donors.

Over 14M Active Donor Profiles
\$Billions in Annual Donations

1,300 Companies Reaching
1.3M Employees



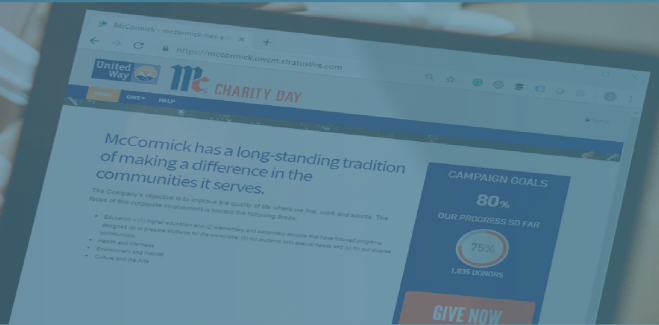
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5 KEYS TO TRANSFORM DONOR EXPERIENCES

Jim Funari, Co-Founder & CEO

StratusLIVE



5 Keys to Transform Donor Experiences



Ease of Use, Adoption
& Collaboration



Personalized, Compelling
Experiences



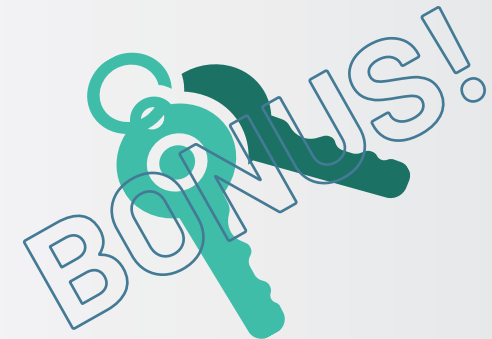
Priority of Digital
Engagement



Consistent, Automated Processes



Consumer-like Targeted
Segmentation



Integration & Processing Flexibility



Key #1 –Ease of Use, Adoption & Collaboration

- *Challenge:* Turnover, Training and Adoption
- Users can consume and use CRM inside of *Outlook, Teams, Mobile and Browser*
- Microsoft Teams added **95M users** in 2020

The image displays three overlapping screenshots of Microsoft software interfaces:

- Top Screenshot (Outlook):** Shows the Outlook desktop application interface. The left sidebar contains folders like 'Unread Mail' (876), 'Demo Emails', 'Inbox' (156), and 'Deleted Items' (4428). The main pane shows an email from 'Brian Billingham' with the subject 'Re: Home Fundraising Visit...'. The top ribbon includes 'File', 'Home', 'Send / Receive', 'Folder', 'View', and 'Help' tabs.
- Bottom-Left Screenshot (Teams):** Shows the Microsoft Teams interface. The left sidebar lists various teams under 'Your teams', including 'Executive - Management', 'Finance', 'Program Management', and several 'Development' teams. The main area shows the 'Current Projects' section for the 'Executive - Management' team.
- Bottom-Right Screenshot (Dynamics 365):** Shows the Dynamics 365 CRM interface for a contact named 'Brian Billingham'. The contact details include 'Contact Number: C0265440', 'First Name: Brian', 'Middle Name: Michael', 'Last Name: Billingham', and 'Address: 7712 Carlton Pl, Mc Lean, VA 22102-2149'. The 'Summary' section shows a list of posts where Brian Billingham gave gifts. The 'Financial Summary Information' section displays metrics such as 'Total Payments: \$272,449.08', 'Total Pledge Balance: \$52,479.34', and 'Total Lifetime Value: \$497,249.08'.



Key #2- Personalized, Compelling Experiences

- *Challenge:* Donor Mindshare and Compelling, Personalized, Sticky Experiences
- *A personalized donor 'home to drive donor engagement*
- *A hub for monitoring engagement and delivering a tailored Donor Experience*

My Dashboard View Data for Charities

Brian Billingham

- Dashboard
- Giving
- Volunteering
- Sponsorships
- Favorites
- Request Assistance
- News Feed

\$419,163.12
LIFETIME GIVING

\$1,500.00
2020 COMMITMENT

432
LIFETIME VOLUNTEER HOURS

● Heart Health ● Medical Research
● Education ● Transplant Fund

Payments: 8 Paid: \$1,000

● Heart Walk ● Hospital Volunteer
● Education

News about your favorite charities and causes:

Action Against Hunger Announces National Network of Soup Kitchens to Serve Homeless
4/2/2019

Popular charity fundraisers in major American cities include lavish black-tie gala benefit dinners that honor celebrities, philanthropists, and business leaders who help to fundraise for the event's goals through solicitations of their social and business connections.

[LEARN MORE](#) [GIVE NOW](#)

Susan G. Komen Race for the Cure Half Marathon Set for December, 2020
4/2/2019

More sophisticated strategies use tools to overlay demographic and other market segmentation data against their database of donors in order to more precisely customize communication and more effectively target resources, shows that charities

My communication preferences:

- Push notifications: OFF
- Emails: ON
- Phone solicitations: ON
- Mail solicitations: OFF

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Key #3 – Priority of Digital Transformation

- *Challenge:* Donors are moving to and expecting Digital Experiences
- *From incrementing to sprinting!* 2020 Pandemic-induced realities...
- We must offer a range of digital engagement modes and options

2020 Online Giving
up by **21%**

The screenshot shows a donation page for the Community Transformation Foundation. The user is Brian Billingham. The page is titled "Where do you want your gift to go?" and shows a progress bar for "Total designated:" with \$201.60 designated and \$38.40 left. Below this, there are four charity options, each with a progress bar and a dollar amount:

Charity	Percentage	Amount
City Homeless Services	20%	\$48
Metro Food Pantry	30%	\$76
Helping Families	10%	\$24
Women's Health Fund	24%	\$57.60

On the right side, the "Your gift:" section shows a total of \$240.00. Below this, the "Payment Methods" section shows a check for \$240.00. The "Designations" section shows the breakdown of the gift: \$48.00 to City Homeless Services, \$72.00 to Metro Food Pantry, \$24.00 to Helping Families, and \$57.60 to Women's Health Fund. The "Recognition Level" is set to Silver. There is a "CANCEL & START OVER" button at the bottom right.

*Source: Chronicle of Philanthropy, Feb 21



Key #4 – Consistent, Automated Processes

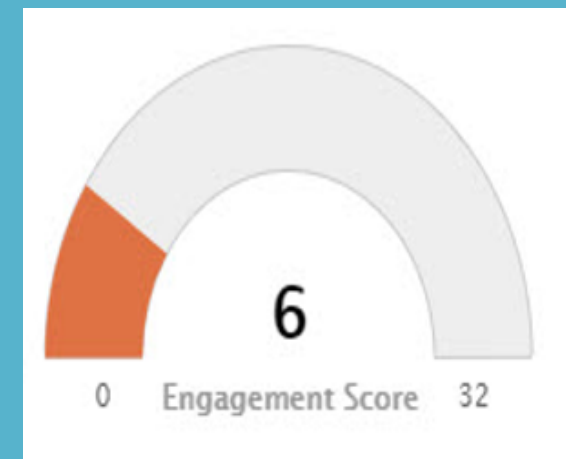
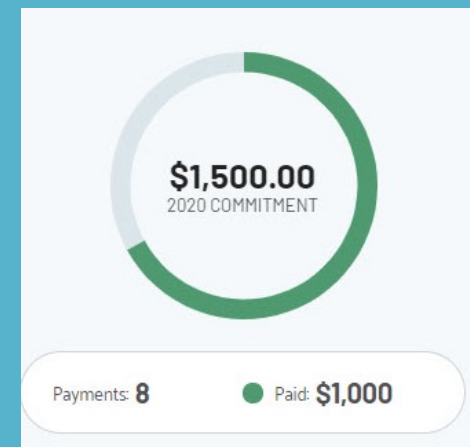
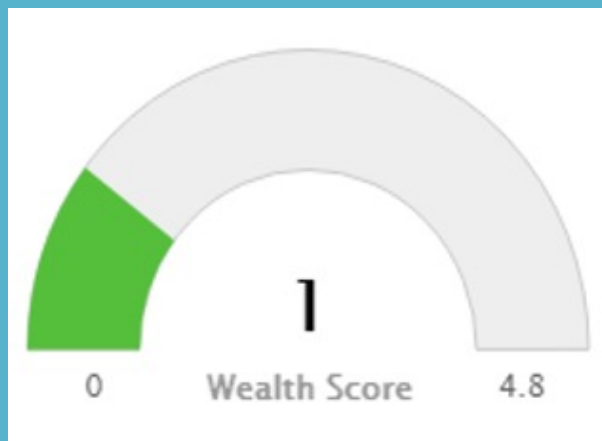
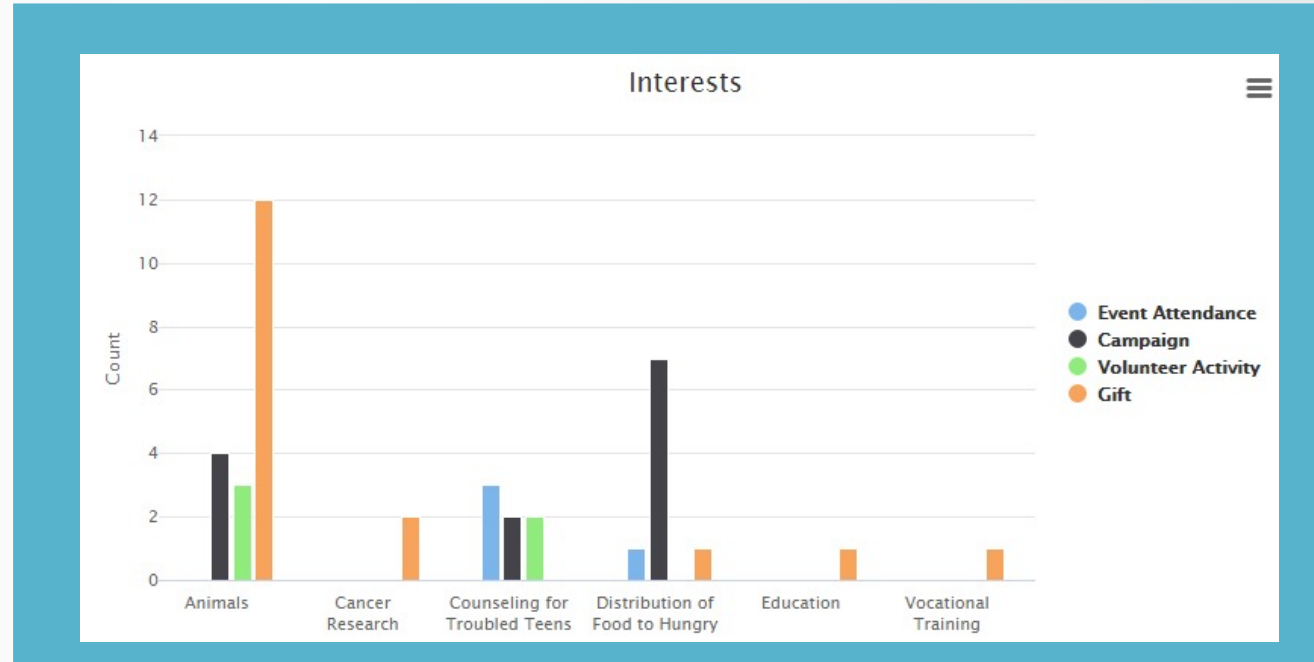
- *Challenge:* Turnover and undocumented processes lead to lack of consistency
- Repeatable, Intelligent, *Automated Business Processes and Workflow*
- Consistency across all Donor Experiences yields tangible benefits and efficiencies

The screenshot displays a fundraising software interface for a "2021 Major Gift Opportunity - Kent Lamotta". The interface includes a navigation bar with options like "NEW", "MAP", "CLOSE AS WON", "CLOSE AS LOST", "RECALCULATE OPPORTU...", "FORM", "PROCESS", "ASSIGN", and "EMAIL A LINK". The main content area shows a workflow progress bar with stages: "Research/Confirmation", "Cultivation (Active for 42 days, 21 hours)", "Ask", "Follow-Up To Ask", and "Stewardship". Below the progress bar, there are fields for "Date Entered Cultiva..." (1/28/2021), "Goal Amount" (\$25,000.00), and "Cultivation Complete" (No). A "Summary" section on the left lists details such as "Topic", "Constituent" (Kent Lamotta), "Opportunity Type" (Major Gift), "Process Code" (Cultivation), "Campaign" (2021 Annual Campaign), and "Campaign Period" (2021). The "POSTS" section on the right shows a list of posts, including one where "Brett Meyer changed Probability from 10% to 25%" and another titled "Time to Cultivate a major gift relationship with Kent Lamotta".



Key #5 – Consumer-like Targeted Segmentation

- *Challenge:* Presenting tailored, relevant opportunities to donors
- Advanced data analytics allows for improved targeting and relevance
- Relevance is key throughout the donor lifecycle





BONUS Key #6 – Integration & Processing Flexibility

- *Challenge:* The Pain of non-integrated point solutions, like a never-ending Plumber's Dream.
- Integration and flexibility from every donor touch point into CRM should be the goal.



Data Integration is the iceberg below the water line

Invisible, Dangerous, Costly

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CLIENT SUCCESS STORY

Alicia Stevens, Director of Customer Success, StratusLIVE
Barbara Hall, Director of IT & IS, United Way of Lancaster County

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STRATUSLIVE 365 DEMO

Brett Meyer, Director of Product Management and Services

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THANK YOU!
info@stratuslive.com

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