

Optimizing your StratusLIVE CRM:

Data Hygiene, Automation and Efficiency Tips

Stratus**LIVE**

MEET THE SPEAKERS



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AGENDA

- Data Hygiene
- Automation
- Efficiency
- Q&A



Data Hygiene

An optimized database
empowers your teams to
best leverage your data.

DATABASE CLEANUP

01

Break the process into smaller projects.

02

Remove lists, views, and workflows that aren't in use.

03

Cross-check email addresses and phone numbers with your marketing platform.

04

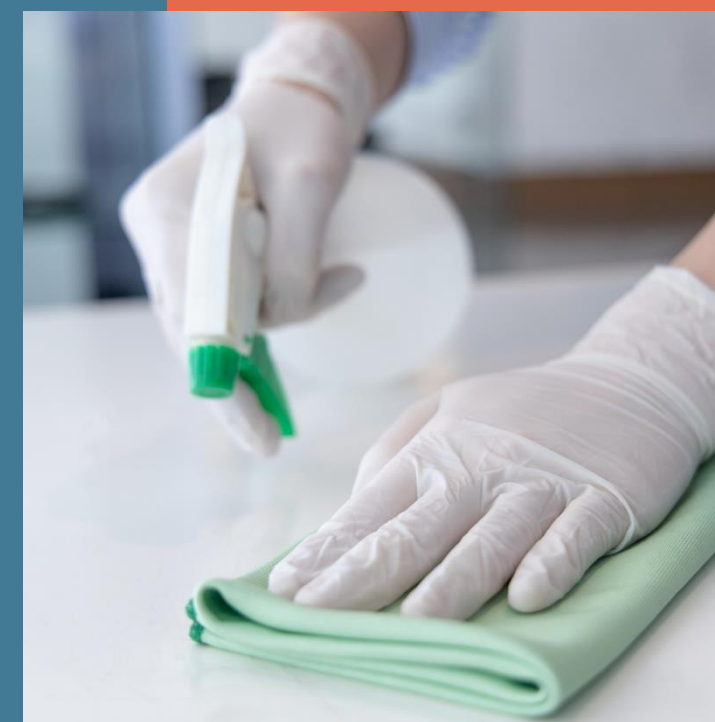
Perform NCOA or Address Verification Services to ensure constituent addresses are up to date.

05

Review the users in your database.

06

Evaluate your integrations.



DUPLICATE DETECTION

BEST PRACTICES FOR DUPLICATE DETECTION RULES

- Adjust the core duplicate detection rules or create new duplicate detection rules to meet your specific criteria
- Select “Ignore Blank Values”
- Select “Exclude Inactive Matching Records”
- Do not select “Case Sensitive”

USE A TIERED APPROACH FOR DUPLICATE DETECTION JOBS

- Constituents in portfolios
- Constituents with donations that are not in portfolios (Segment by donation size if needed)
- Constituents without donations, but with engagement data
- Schedule recurring duplicate detection jobs

USE BULK RECORD DELETION TO REMOVE INACTIVE CONSTITUENT RECORDS

Automation

Streamlined processes to
work smarter, not harder.

Types of Automation

01

Ignite and Give at Work

02

Third Party Integrations

03

Built in StratusLIVE Automation

04

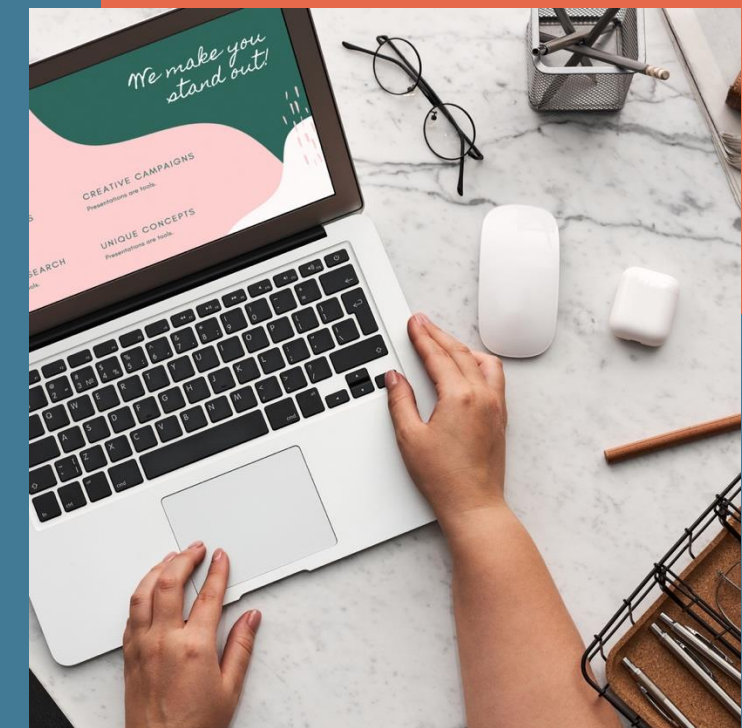
Workflow

05

Business Rules & Recommendations

06

Business Process Flow



A circular inset image showing three hands with red nail polish high-fiving. A smiling woman's face is partially visible in the background of the circle.

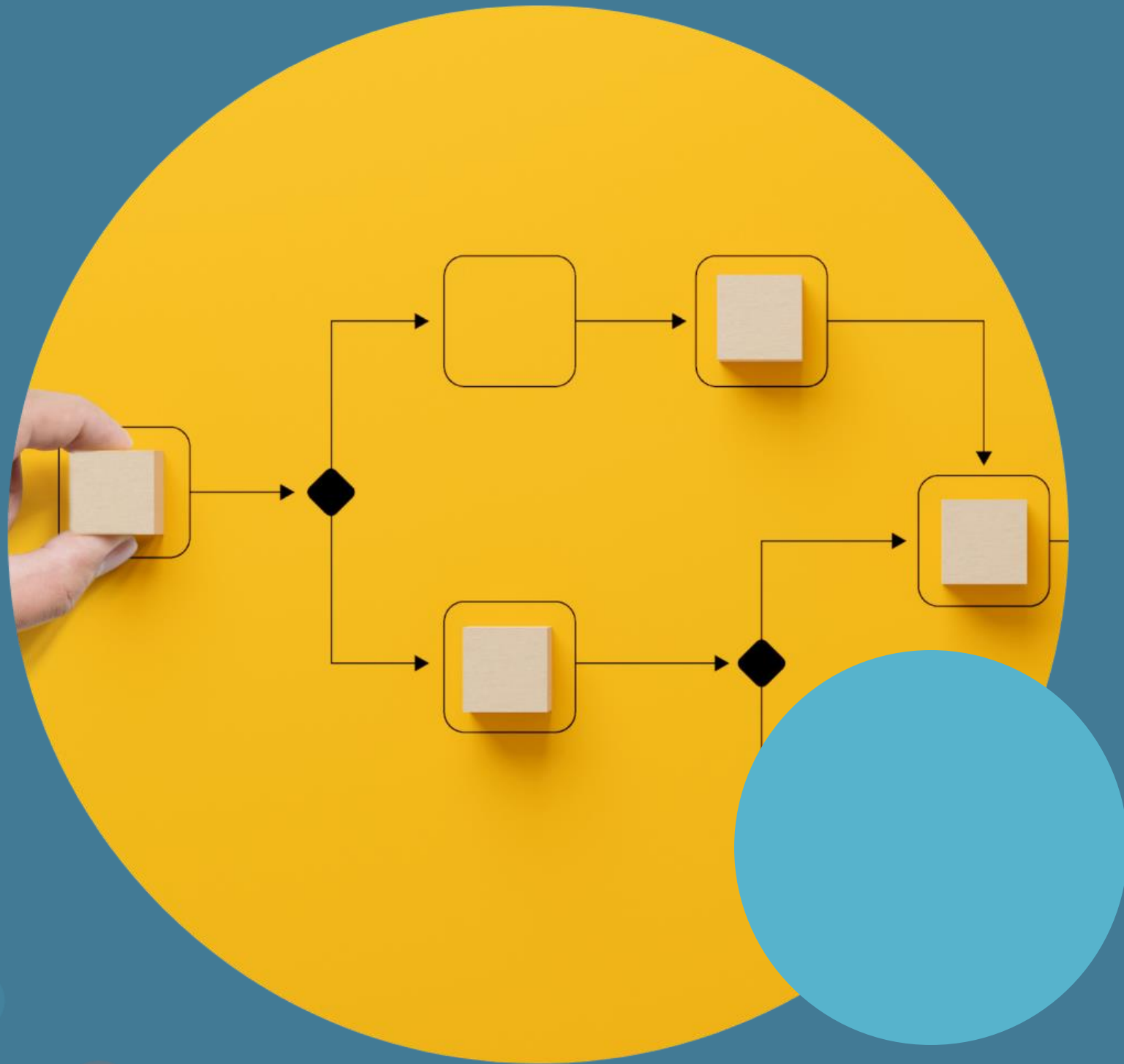
Third Party Integrations

- Email Marketing (DotDigital)
- Wealth Screening (iWave & WealthEngine)



Built in StratusLIVE Automations

- Recognitions Engine
- Interests Engine
- Engagement Scoring



Workflows

- Background vs Real-Time vs On Demand
- Record Creation
- Field Updates
- Notifications



Business Rules

- No Code Logic for Forms
- Show or Hide Fields
- Control when a Field is Required
- Recommendations

Business Process Flows

A Visual Representation of Your Organization's Process

- No Code Configuration
- Customizable Stage Names
- Streamlined Data Entry

The screenshot displays a business process flow for 'Parker's Choice Major Gift Opp'. At the top, a progress bar shows stages: Research/Confirmation, Cultivation, Ask, Follow-Up To Ask, and Stewardship (5 Mo). The 'Stewardship' stage is currently active. Below the progress bar, the 'Summary' tab is selected, showing fields for Topic, Constituent, Opportunity Type, Process Code, and Completion. The 'Timeline' tab is also visible, showing a list of activities: 'Email from Joel Parker' and 'Phone Call from Joel Parker'. A modal window is open over the 'Stewardship' stage, displaying fields for Date Entered, Special Stewardship, Stewardship Completed, and Actual Amount. The 'Finish' button is visible at the bottom of the modal.

Topic*	Constituent*	Opportunity Type*	Process Code	Completion*
Parker's Choice Major Gift Opp	Parker's Choice	Major Gift	Stewardship	

Activity	Date
Email from Joel Parker	11/5/2024 1:35 PM
Phone Call from Joel Parker	11/5/2024 1:35 PM

Field	Value
Date Entered Stewardship	11/5/2024
Special Stewardship Notes/Plan	---
Stewardship Completed	No
Actual Amount	---

A Guided Process, Not a Rigid Process

- Branching Logic
- Additional Field Requirement Control
- Trigger Workflows by Stage or Action Steps

Actionable Tips to Unlock Hidden Efficiencies



UNLOCKING HIDDEN EFFICIENCIES

- Customizations
- Segmentation
- Reporting & Analytics



CUSTOMIZATIONS

 Fundraising Efficiency

 User Satisfaction

 Productivity

CUSTOMIZATIONS

EXAMPLES

- Utilizing Custom User & Team Roles
- Create Custom Fields & Forms

Name ↑
UWSEM Financial Processing Professional
UWSEM Grants Management
UWSEM Imports
UWSEM Investments
UWSEM Leadership Giving
UWSEM Leadership Giving 1
UWSEM Manager
UWSEM Marketing Manager
UWSEM Marketing Professional
UWSEM MEAP Management

Team Name ↑
UWSEM Accounts Receivable
UWSEM Admins
UWSEM Basic Team
UWSEM Board
UWSEM Business Success
UWSEM CEO Inner Circle View Only Team
UWSEM Collective Impact
UWSEM Corporate Relations
UWSEM Corporate Relations Leadership
UWSEM Finance Queue

← Save Save & Close + New Open Org Chart Deactivate Connect Add to Marketing

AF AFL

Account Information test

Angie Myers
Employee Coordinator

Maria M
Owner

General

Financial

Opportunities

Employees

Notes & Activities

Related

Account Number

A0005778

Legacy Account Number

137

Development Stage

Managed

Dev. Stage Reason

Strong workplace campaign

Account Information

Account Name

*

AFL

Main Phone

+18644330333

Is Constituent

☒

Main Phone Extension

Parent Account

Other Phone

Employee Coordinator

Angie Myers

Other Phone Extension

CEO

Jaxon Lang


Fax

+18644335560

CUSTOMIZATIONS

EXAMPLES

- Accessing System and Shared Views
- Model Driven Apps




Local Client Default

This is your local solution for StratusLIVE Users

Default Publisher for Titan

2/27/2025

UNIFIED INTERFACE



Major Gifts/Development

Used by Staff who are developing donors

Default Publisher for Titan

2/13/2025

UNIFIED INTERFACE

Look for: Activities ▼ Select

Use Saved View: [new]

[new]

System Views

- Activities Closed in Last 4 Months
- Activities Scheduled in Next 4 Months
- All Activities
- Closed Activities
- Last Activity
- My Activities
- My Closed Activities
- My Completed Activities Past 12 Months
- My Direct Reports' Past Due Activities
- My Past Due and Activities Due this Week**
- My Team Members' Activities
- Next Activity
- Open Activities
- Scheduled Activities

Home Recent Pinned

My Work

Dashboards

Activities

Constituents

Accounts

Contacts

Prospecting

Show Chart Task Email App

All Activities ▼

Activity

- All Activities
- My Activities
- Activities Closed in Last 4 Months
- Activities Scheduled in Next 4 Months
- Closed Activities
- Last Activity
- My Closed Activities
- My Completed Activities Past 12 Months
- My Direct Reports' Past Due Activities
- My Past Due and Activities Due this Week**
- My Team Members' Activities
- My Past Due and Activit

Yield positive results with Proper Segmentation



PROPER SEGMENTATION

↑ Donor Engagement

↑ Donor Retention

↑ Customer Satisfaction

SEGMENTATION

ENGAGEMENT SCORING

- Measures and ranks donor involvement
- Allows you to better target prospects
- Gain insight on a donor's giving life cycle

StratusLIVE Local Client Default

Auto-Numbering ...
Data Sources
StratusLIVE Settings

Domain Lists
Adjustment Types
Assignment Types
Certification Type
Certification Sub T...
Chart of Accounts
Communication Pr...
Engagement Score...
Gift Plan Templates
Invoice Types
Job Titles
NAICS

SS SL Settings

Active Engagement Score Types

Name	Points Value	Description of Measure	Is System Score Type
2-5 Years since last gift	3	Look at most recent payment/pledge accounting date, if m...	Yes
6-10 Years since last gift	1	Look at most recent payment/pledge accounting date, if m...	Yes
Alumnus	15	Alumnus Participation Type with no end date	Yes
Attended an Event	1	Count Event Attendee records times points value	Yes
Board Member	30	Board Member Participation with no end date	Yes
Current Campaign Prospect	10	Opportunity in current campaign period (from SL Settings)	Yes
Current Won Campaign Prospect	20	Opportunity in current campaign period (from SL Settings) t...	Yes
Donor	1	Donor Participation Type with no end date	Yes
Gave 5 or more Gifts	5	Counts numbers of Gifts/Pledges, if 5 or more give points	Yes
Less than 2 years since last gift	5	Look at most recent payment/pledge accounting date, if tw...	Yes
Managed/Assigned	1	Managed/Assigned Participation Tyne with no end date	Yes

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SEGMENTATION

01

Lapsed Status field helps to focus on donor retention

03

Community Groups demonstrate donors that are passionate about certain groups

02

Recognition Levels triggering transactions allow you to segment donors based on giving level


04

Adoption of Prospect Research Form creates opportunity to segment donors based on various giving thresholds, assets, and other philanthropic interests



SEGMENTATION

PROSPECT RESEARCH FORM



Brian Billingham

Contact · Prospect Research ▾

Brett Meyer

Owner

Summary

Prospect Research

Assets

Related

Active Prospect Stages ▾

Zendesk

✓ Contact ▾	Account ▾	Prospect Stage ▾	Prospect Type ▾	Start Date ↓ ▾	End Date ▾
Brian Billingham	---	Stewardship	Major Gift	4/1/2020	---

Active Other Philanthropies ▾

Zendesk

✓ Name ↑ ▾	Account ▾	Contact ▾	Amount ▾	Org
Brian Billingham : Doctors Without Borders	---	Brian Billingham	\$20,000.00	Dc

Active Ratings ▾

Zendesk

✓ Account ▾	Contact ▾	Rating ▾	Rating Type ▾	Rating Source ▾	Inclination ▾
---	Brian Billingham	<\$10,000	Annual giving	Internal	High
---	Brian Billingham	\$100K - \$500K	Capital giving	Internal	Medium

Active Transactions ▾

Zendesk

✓ Contact ▾	Account ▾	Payment Method ▾	Transaction Type ▾	Transaction Nu... ▾	Transaction A
Brian Billingham	---	Check	Payment	000060616	\$1
Brian Billingham	---	Check	Payment	000060616	\$1
Brian Billingham	---	Check	Payment	000060616	\$1
Brian Billingham	---	Credit-Debit C...	Payment	000060547	\$5

Active Assets ▾

Zendesk

✓ Asset Name ↑ ▾	Account ▾	Contact ▾	Asset Type ▾	Asset Value ▾
Brian Billingham : Property-Rea	---	Brian Billingham	Property-Real ...	\$3,143,000.00
Brian Billingham : Property-Rea	---	Brian Billingham	Property-Real ...	---

Active Media ▾

Zendesk

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Capitalize on Efficiency with Strong Reporting & Analytics



REPORTING & ANALYTICS

- Measure fundraising campaign effectiveness
- Identify trends in donor giving behavior
- Make informed decisions about resource allocation

REPORTING & ANALYTICS

01

PowerBI empowers your organization to track and monitor, and visualize meaningful data

03

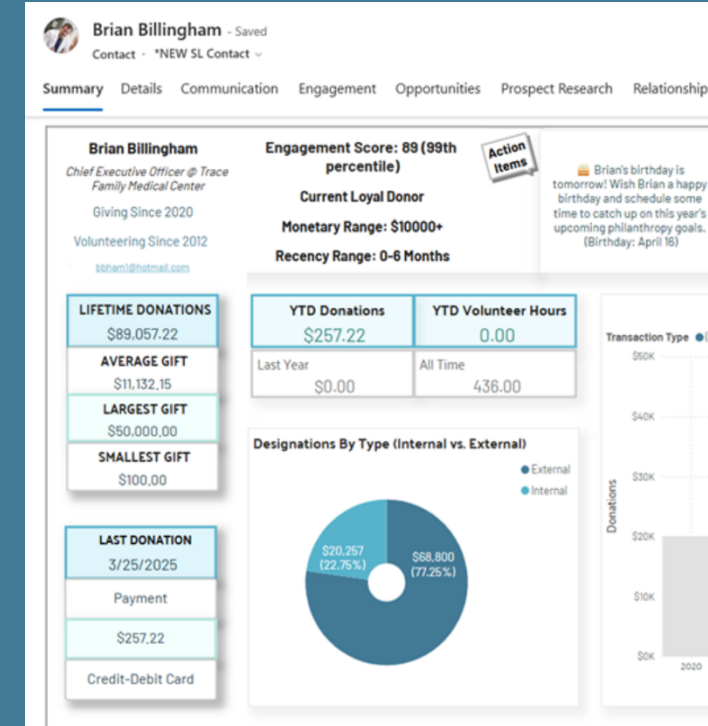
Custom reporting features within StratusLIVE 365 allow organizations to generate insights that directly support strategic decision-making, ensuring that reports are actionable rather than just informational

02

StratusLIVE Out of the Box Reports offer multiple ways to envision data

04

Custom Dashboards and real-time reporting allows you to track donations, donor engagement, and campaign performance



THANK YOU
FOR YOUR TIME!

