



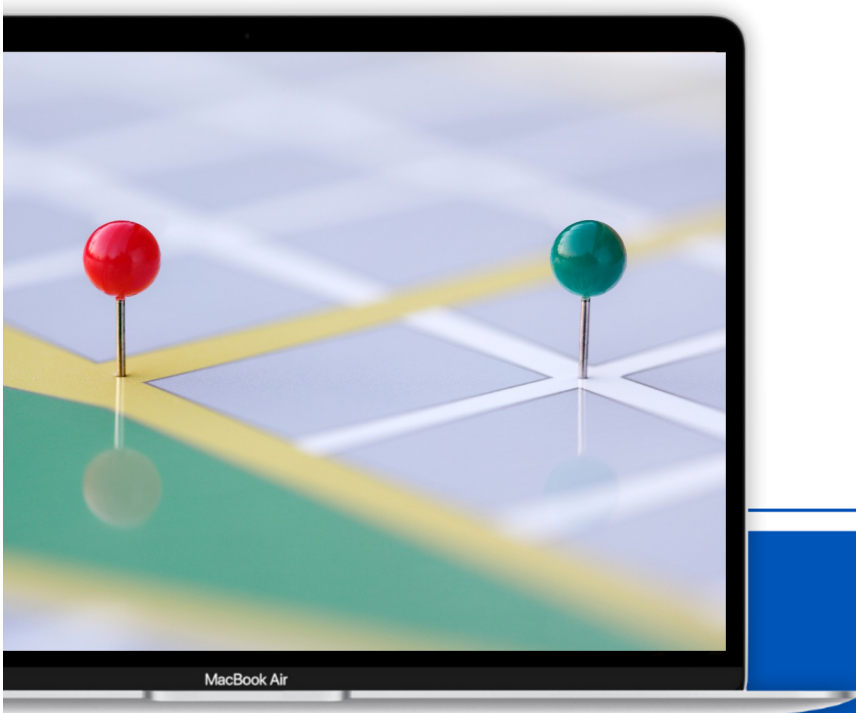
The DNA of CRM

Finding a Solution that Works for You

August 24, 2023

Our Journey

The Problem: Tech Nightmares
Our Solution: Searching for Shiny
The Answer: Wisdom is Within



Our New Normal

January 2020



Workplace



Allocations



Marketing

After March 2020

Digital >

Direct >

On Demand !

A True Story



Each Point Solution = Potential Problem

Pros

Ease of Use

Fit for Purpose

Free or Low Cost

Cons

Siloed Data

Manual Uploads

Hidden Time





Which Data to Believe?





The Solution?





1. People?
2. Process?
3. Platform?

PPP

Criteria for Success



People - "organizational wisdom" is already in the room, blending newcomers with seasoned team (40%)

Process – creating playbook of our "united way" of working, frees us up when creativity is required (40%)

Platform – "automating teamwork" via workflows with an unified view of data, equips team decision-making (20%)



Managing Change as Leaders

Criteria for Success



WHY – a compelling **WHY** provides context, unlocking team creativity and helping everyone anticipate change

WHAT – clearly defining **WHAT** success looks like and measuring how far we've already come builds momentum and buy-in

HOW – trusting the **HOW** to talented, gifted people working in their unique abilities unleashes commitment and follow-through

PLAYBOOK | Scalable Processes

A Consistent HOW Delivers Ideal Experiences

- Process Mapping of Core Workflows
- Best Practice Reviews & Optimization
- Accelerates onboarding, improves retention



Deciding our 'united way' of Working

How do we handle...

- ADT chair calls in and says *"put Wanda down for \$15K this year"*
- Designated agency has not cashed a check in over 90 days
- ECM writes-in a designated charity that is no longer in business
- Five employees from VA gave \$500 last month in Benevity portal
- Donor is member/multiple affinity groups: how many emails/month





OPTIMIZING PROCESSES

Pledge Lifecycle

- Capture
- Collect
- Distribute





Pledge Lifecycle

<i>Phase</i>	<i>Stage</i>	<i>Definition</i>
CAPTURE		Activities to capture current/future donor financial commitments
	Record	Methods of recording donor intent & donation transactions
	Confirm	Internal review/eligibility/exceptions management to confirm donor intent
	Acknowledge	Automated acknowledgement to confirm intent accuracy/completeness
COLLECT		Activities to collect current/future financial commitments
	Receivables	Establishing/recording the pledge receivables in system(s) of record
	Invoicing	Delivering requested reminders about pledge receivables & reconciliation
	Servicing	Providing tax receipts (as required) and other donor-facing support
DISTRIBUTE		Activities to payout donations to recipient nonprofit organizations (NPOs)
	Payables	Establishing/delivering timely NPO payments fulfilling donor intent
	Optimizing	Renewing NPO eligibility and electronic payment/reporting capabilities
	Reporting	Updating NPO and Donor facing portals, providing regular updates



OPTIMIZING PROCESSES

Donor Lifecycle

- Find
- Enroll
- Engage





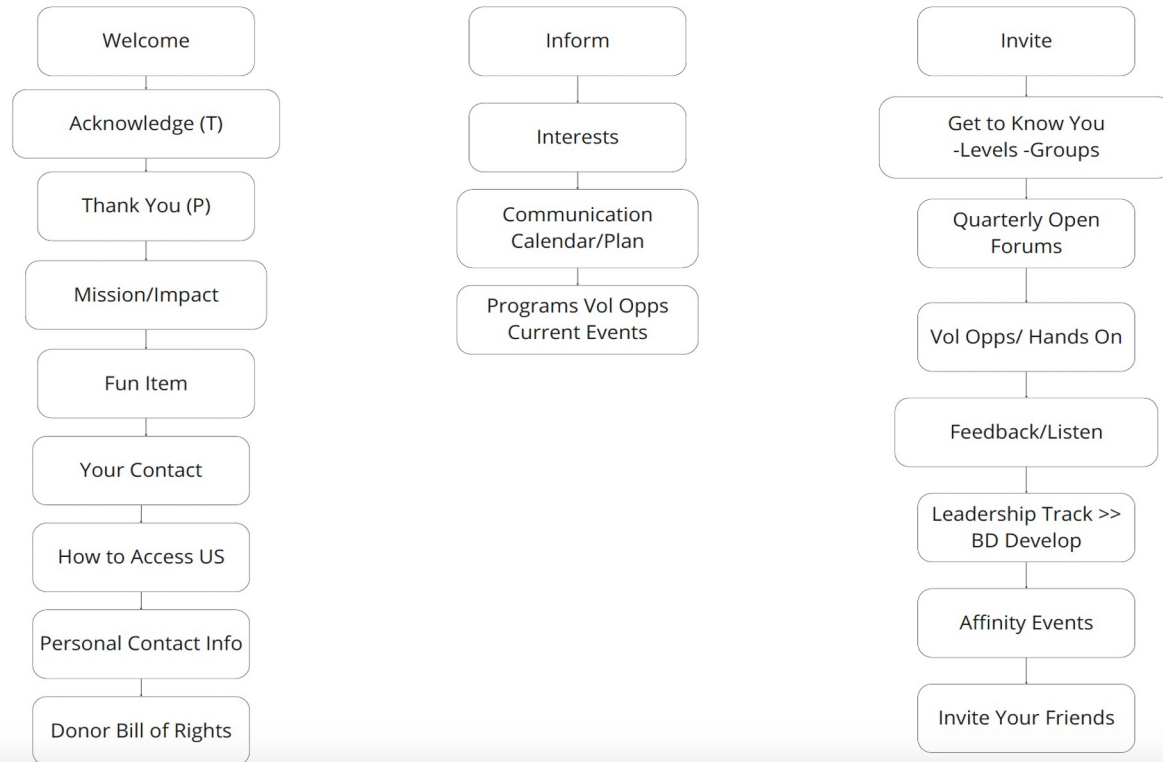
Donor Lifecycle

<i>Phase</i>	<i>Stage</i>	<i>Definition</i>
FIND		Activities to identify, qualify, and cultivate leads
	Identify	Finding new organizational/individual prospects
	Qualify	Defining/determining right fit leads for prioritization
	Cultivate	Initial outreach, asks, supports to nurture leads
ENROLL		Activities to plan, ask, and confirm commitments
	Plan	Initial efforts to gain/regain commitment
	Ask	Direct invitation to give or volunteer
	Confirm	Immediate next steps after action
ENGAGE		Activities to welcome, inform, and connect supporters
	Welcome	Onboarding new/returning individual donors & volunteers
	Inform	Planned communications to educate
	Connect	Intentional opportunities to cultivate connections



After Care > Stewardship

After Care > Stewardship



Scanning the Market: Success Criteria

- Supports UW's transformation/vision
- Minimizes the number of point solutions
- Proven, out of the box, widely adopted by visionary NPOs
- Aggregates giving/volunteering opportunities
- Optimizes relationships/engagement with key constituents
- Robust training/self-support options to speed adoption
- Self-service portals for donors, volunteers, nonprofits
- Minimizes logins for online experiences
- Overall cost/value during five-year period





1 Company Overview		
1a	Legal Name of Company	
1b	Headquarters location	
1c	Year Business Established	
1d	Company Point of Contact (name, email)	
2 Proposed Solution		
2a	Product Name(s) and Background	
2b	Included Company modules	
2c	Required external services/solutions	
2d	# Active Customers on Proposed Solution	
2e	# Active United Ways on Proposed Solution	
2f	Three Related References on Proposed Solution	
3 Technology Platform & Support		
a.	Solution Architecture	
b.	Company Audits/Certifications/Accreditations	
c.	Managed/Supported Integrations (180 & 360)	
d.	Support Services Overview (end user, implementation, training, reporting, etc.)	
4 CRM Capabilities		Y/N Comments (reference module, describe in more detail or feel free to link to existing content where possible)
4a Lead/Nuture/Cultivation		
i.	Individual Profiles	
ii.	Organizational Profiles	
iii.	Household Profiles	
iv.	Identify Leads (workplace employees, website leads, volunteer rosters, vendors)	
v.	Analyze/Qualify Leads (research, relationships, networks, engagement, wealth)	
vi.	Cultivation (qualified leads assigned, who best to connect, what to ask)	
vii.	Lead/Nuture/Cultivation workflows/journeys/resources within solution	
viii.	Other:	
4b Solicitation/Ask		
i.	Cause Campaigns/Giving Pages	
ii.	High-Net Worth/individual giving requests	
iii.	Corporate Giving requests	
iv.	Foundation Grant requests	
v.	Employee/Workplace annual campaign	
1	Giving catalogue (UW initiatives> local affiliated nonprofits > IRS database)	
2	Gift types (payroll withholding, credit card, direct bill, stock, combination)	
3	Gift amount, frequency, and duration (typically annually)	

Lead/Nuture/Cultivation (7)
Solicitation/Ask (12)
Processing/Operations (12)
Stewardship (10)
Marketing Automations (8)
Project Management (5)
Web Portals (5)
Reporting (8)
Other Included
FUNCTIONAL SCORING



ALL SCORES			TEAM 1	TEAM 2	TEAM 3	TEAM 4	TEAM 5	TEAM 6	TEAM 7	TEAM 8	TEAM 9	TEAM 10	TEAM 11	TEAM 12	TEAM 13	TEAM 14	TEAM 15	TEAM 16	TEAM 17
TOP RATED SYSTEMS PER PERSON >>>			82%	82%	80%	82%	76%	95%	93%	91%	82%	80%	78%	NA	NA	81%	89%	NA	87%
DEMO SCORING			AVG	TOTAL	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100	1-100
DEMO 1																			
TEAM SCORE		4990	335	325	415	260	245	450	555	400	480	385	370	0	0	290	0	0	480
% of Possible	64%	7800	56%	54%	69%	43%	41%	75%	93%	67%	80%	64%	62%	0%	0%	48%	0%	0%	80%
DEMO 2																			
TEAM SCORE		3785	365	200	200	280	160	280	280	0	280	0	0	0	0	240	505	0	220
% of Possible	45%	8400	61%	33%	33%	47%	28%	47%	47%	0%	47%	0%	0%	0%	0%	40%	84%	0%	37%
DEMO 3																			
TEAM SCORE		4815	380	440	440	370	450	450	450	0	0	0	0	0	0	255	0	0	520
% of Possible	73%	6600	63%	73%	73%	62%	76%	76%	76%	0%	0%	0%	0%	0%	0%	43%	0%	0%	87%
DEMO 4																			
TEAM SCORE		6880	490	490	460	490	420	420	420	0	350	360	0	0	0	485	535	0	420
% of Possible	76%	9000	82%	82%	77%	82%	70%	70%	70%	0%	58%	60%	0%	0%	0%	81%	89%	0%	70%
DEMO 5																			
TEAM SCORE		5789	380	460	250	330	420	420	420	0	470	0	0	0	0	365	529	0	440
% of Possible	69%	8400	63%	77%	42%	55%	71%	71%	71%	0%	78%	0%	0%	0%	0%	61%	88%	0%	73%
DEMO 6																			
TEAM SCORE		4870	400	460	480	350	390	390	390	0	395	0	0	0	0	480	0	0	460
% of Possible	74%	6600	67%	77%	80%	58%	65%	65%	65%	0%	66%	0%	0%	0%	0%	80%	0%	0%	77%
DEMO 7																			
TEAM SCORE		5119	300	490	345	420	445	525	420	485	0	460	365	0	0	350	514	0	0
% of Possible	71%	7200	50%	82%	58%	70%	74%	88%	70%	81%	0%	77%	61%	0%	0%	58%	86%	0%	0%
DEMO 8																			
TEAM SCORE		3977	310	475	240	260	160	510	490	195	0	410	370	0	0	325	232	0	0
% of Possible	55%	7200	52%	79%	40%	43%	27%	85%	82%	33%	0%	68%	62%	0%	0%	54%	39%	0%	0%

DEMO SCORING

- A. Understands UWXX needs
- B. Helps us move into future
- C. Breaks down team silos
- D. Intuitive/easier to use
- E. Helps me know our interactions
- F. Improves my daily workflow

Finding a CRM that Works for You??

Trust the Wisdom in the Room

- Cross functional team (experienced & new)
- Avoid the temptation to shop
- Define your WHY

Review & Optimize Core Workflows

- Special focus on cross-functional handoffs
- Question everything (honor fresh eyes)
- Ruthlessly simplify (unforced errors)

Be Informed Buyers

- What Success Looks Like
- Cast the net widely
- Understand tradeoffs



Q&A & Next Steps



Discovery Day

Playbook/Process Optimization

Requirements/Success Criteria

Market Survey & Purchasing

Implementation Support



COMPASS™

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