StratusLIVE WEBINAR

Top Tips to Transform your Database for 2024

StratusLIVE Tech Talks WITH ORR GROUP

AGENDA

- Speakers
- About StratusLIVE
- About Orr Group
- Data Health
- Database Cleanup Tips
- Reports & Dashboards
- Pipeline Preparation
- Staff Training
- Database Analysis
- Q&A

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Where Nonprofits Grow

DRIVE CHANGE AND INCREASE IMPACT WITH STRATUSLIVE

CATALYST INVESTORS — SaaS Market Map

techsoup

MOST PROMISING MICROSOFT SOLUTIONS PROVIDER 2022

StratusLIVE

Awarded by CIOReview

High Performer — SPRING 2023

High Performer — SUMMER 2023

100%
Implementation Success Rate

+58 NPS

20+ M
Donor Profiles

$1B+
Annualized Giving

StratusLIVE's Nonprofit Industry Cloud delivers a complete, fully-integrated, enterprise-class solution for modern digital fundraising.

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Introduction to Orr Group

Orr Group is a premier fundraising consulting firm with a national presence and reputation for providing comprehensive and skilled services. Orr Group is a full-service embedded partnership firm, where we offer our nonprofit partners a broad range of expertise and capabilities, from working at the highest levels of leadership and strategic planning to providing granular day-to-day support and implementation.

Strategy   Campaigns   Fundraising   Planned Giving   Leadership   Talent

ORR GROUP

Data Analytics and Management

Orr Group recognizes the challenges nonprofits face, and we partner with our clients to address them.

We specialize in utilizing efficient systems to analyze and manage data in order to solve problems and look for opportunities, ultimately driving strong cultures of philanthropy.

Our team focuses on developing these solutions alongside our partners– quickly assessing the intricacies of an organization's existing systems and processes, its impact on data, areas for improvement, and avenues for change.

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Your database is a living, breathing entity.

Do you know what's lurking beneath the water?

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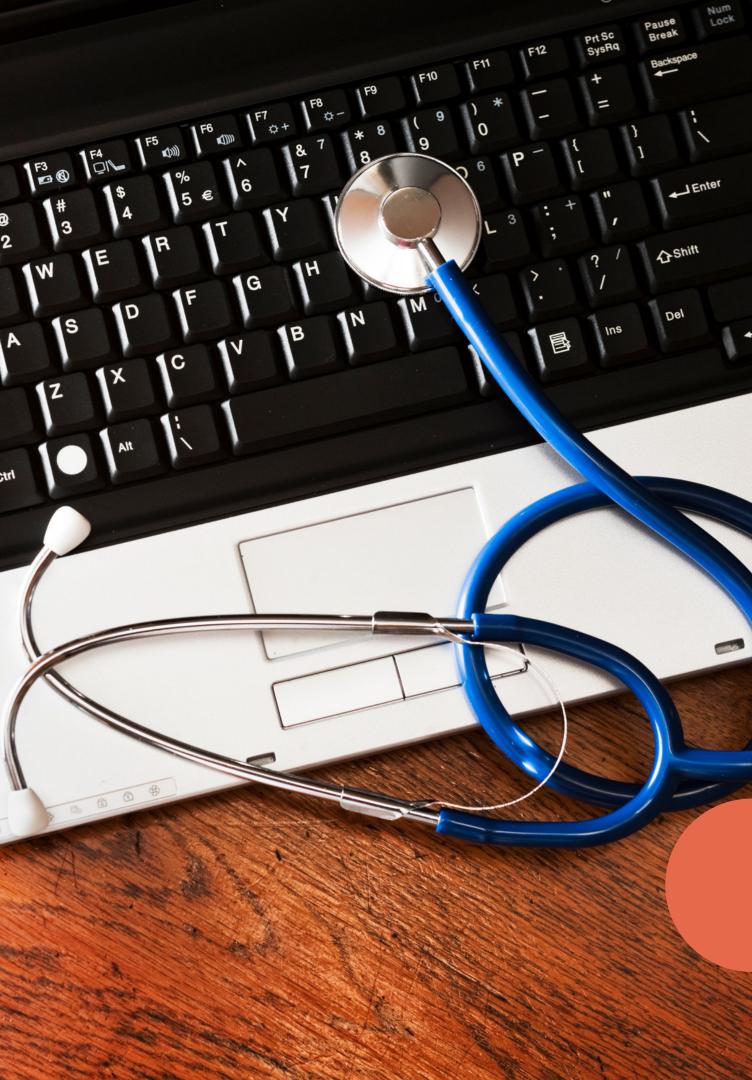*Where Nonprofits Grow*

CHECK YOUR DATA HEALTH

- Represents how well an organization's data supports its business objectives

- Data is healthy if it is easily discoverable, understandable, and of value to the people that need to use it, and these characteristics are sustained throughout its lifecycle(1).

1. Talend

EXAMPLES OF MESSY DATA

Typos

Duplicate Records

Non-Standardized Formatting

Missing Data

Outdated or Inaccurate Data

DATABASE CLEAN UP TIPS

- Break up clean up into smaller chunks

- Remove lists, views, workflows not in use (review the triggers)

- Evaluate your data

- Review users, roles, permissions

- Evaluate integrations

- Remember: your database can help you out!

  - Duplicate Detection Rules

  - Bulk Record Deletion

- One database, system of record makes this easier

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IDENTIFY YOUR PROGRESS: REPORTS & DASHBOARDS (EOY)

- Raised-to-date against goal

- Restricted vs. unrestricted funding progress

- Raised-to-date by fundraiser

- Raised-to-date by Board and committees

- Donor retention, acquisition, attrition, and recapture rates

- Breakdown of donors – individual vs. corporate vs. foundation

- Pipeline progress – asks made, new prospects added, etc.

- Fundraiser activity – number of meetings, calls, solicitations, newly added prospects

- LYBUNT & SYBUNT analysis

- Average gift amount

REPORTS & DASHBOARDS (START-OF-YEAR)

- Identify new factors to track in the new year
- Set up daily, weekly, monthly, quarterly reports
- Create team and individual dashboards highlighting important KPIs and metrics

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PIPELINE PREPARATION

- Evaluate any lapsed donors from prior years to add to the pipeline

- Refresh any outdated cultivation and solicitation plans

- Evaluate the year's communication calendar with the pipeline to help with further cultivating prospects

- Identify opportunities to re-engage donors and prospects in the new year

- Find and update any gaps in the pipeline

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STAFF TRAINING

- Identify users that need additional training & support

- Set up organization-wide training sessions

- Highlight any webinars that may be of interest

- Participate in User Groups

- Nominate users to be 'champions'

- Create and/or refresh any standard operating procedures or style guides/naming conventions

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DATABASE ANALYSIS

- How is your organization utilizing your data?

- Are there areas of functionality that your team is not prioritizing that are of interest?

- What are your data goals for the new year?

- Can you enhance your data with integrations?

- What's working? What's not working?

- What processes or work streams can be streamlined, automated, etc.?

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THANK YOU

ANY QUESTIONS?

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Stay In Touch

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