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Leveraging Technology for Donor Management and Fundraising Intelligence



WELCOME

Today's Presenters



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LEVERAGING TECHNOLOGY FOR DONOR MANAGEMENT

Agenda

- Current philanthropy trends
- Ways to leverage Salesforce to combat volatility
 - Donor Segmentation
 - Wealth Engine
 - Donor Journeys
 - Storytelling
- How to start/next steps



2022 (JAN – DEC) vs. 2021 (JAN – DEC)

Nonprofit Sector Trends



- Total dollars fundraised are **down** 1.7%
- Total donors are **down** 10%
- Donor retention is **down** 3.5%
- New-retained donors (gave prior year, but never before) are **down** 26.4% year-over-year
- Notable from 2021 to 2022, supersize (\$50k+) donors **decreased** 4.7%, responsible for almost half the decrease in dollars raised

Source: Association of Fundraising Professionals - Fundraising Effectiveness Project



FUNDRAISING

Leveraging Technology to Combat Volatility

- Organizations cannot predict or control external events and market conditions
- Preparation, advance planning, and leveraging data are key – pro-active vs. reactionary mindset
- Organizations should put an increased focus on what they can control:
 - Who you engage – Data Collection for Donor Segmentation
 - What you ask for – Capacity Segmentation with Wealth Engine
 - When you engage – Donor Journeys
 - How well you retain – Storytelling

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Data Collection Fueling Donor Segmentation

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Capacity Segmentation With Wealth Engine



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Capacity Segmentation with Wealth Engine

- Integrates with Salesforce
- Provides wealth profiles
- Support outreach efforts

REPORT
Leads from WE Prospect

Total Records
13,610

WE PROSPECT LIST NAME	FULL NAME	STATE	LEAD SOURCE	NET WORTH	TOTAL ASSETS	P2G	GIFT CAPACITY RANGE
List Created 19-Jan-18_1 (19 records)	PAULA F	ID	WE	\$1MM-\$5MM	\$1MM-\$5MM	15	\$75K-\$100K
	JEFF B	ID	WE	\$1MM-\$5MM	\$1MM-\$5MM	33	\$40K-\$50K
	JOHN W	ID	WE	\$1MM-\$5MM	\$1MM-\$5MM	15	\$75K-\$100K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	10	\$30K-\$40K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	25	\$75K-\$100K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	25	\$75K-\$100K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	25	\$50K-\$75K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	25	\$75K-\$100K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	24	\$100K-\$200K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	24	\$100K-\$200K
	MM			\$1MM-\$5MM	\$1MM-\$5MM	25	\$75K-\$100K

▼ Wealth Engine

P2G Score	14.00	Est. Annual Donations	\$1K - \$5K
P2G Description	1/4 - Excellent	Net Worth	\$1MM - \$5MM
Gift Capacity Range	\$100K - \$200K	Total Assets	\$1MM - \$5MM
Description		Cash on Hand	\$10K - \$100K



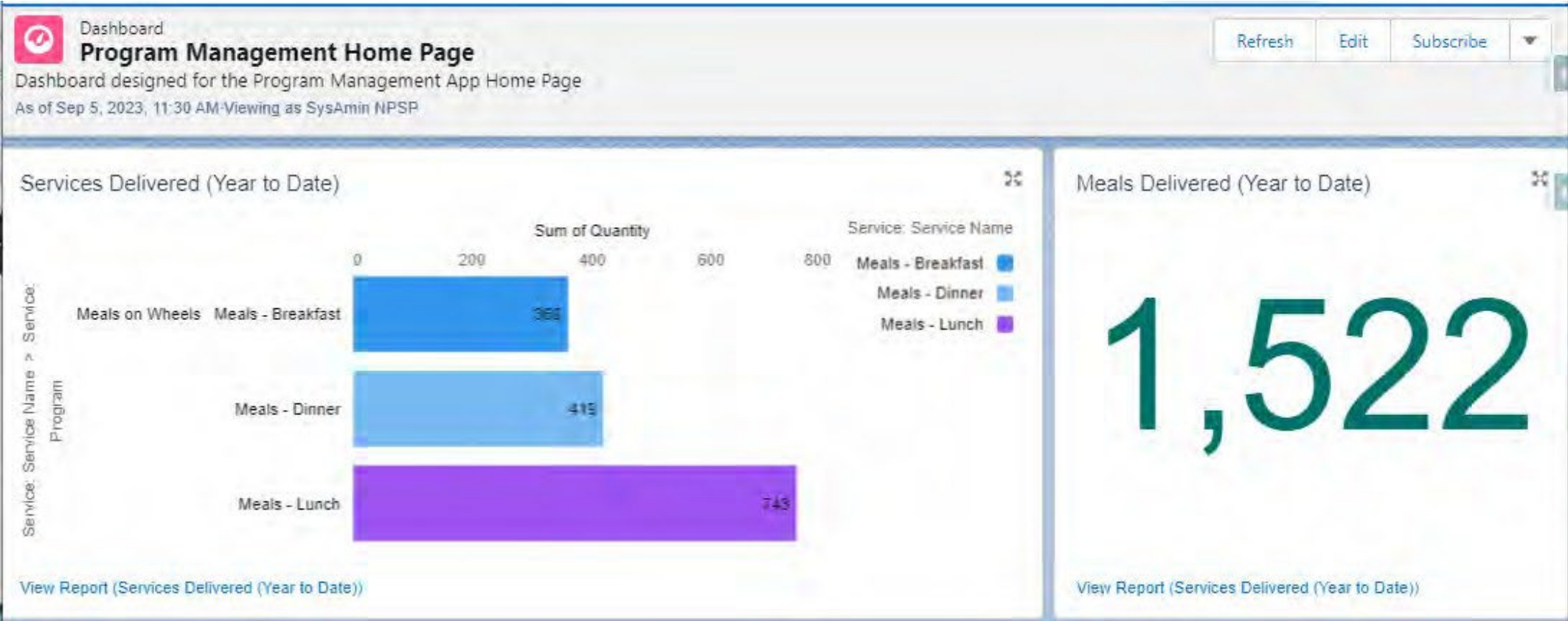
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Donor Journeys for Engagement

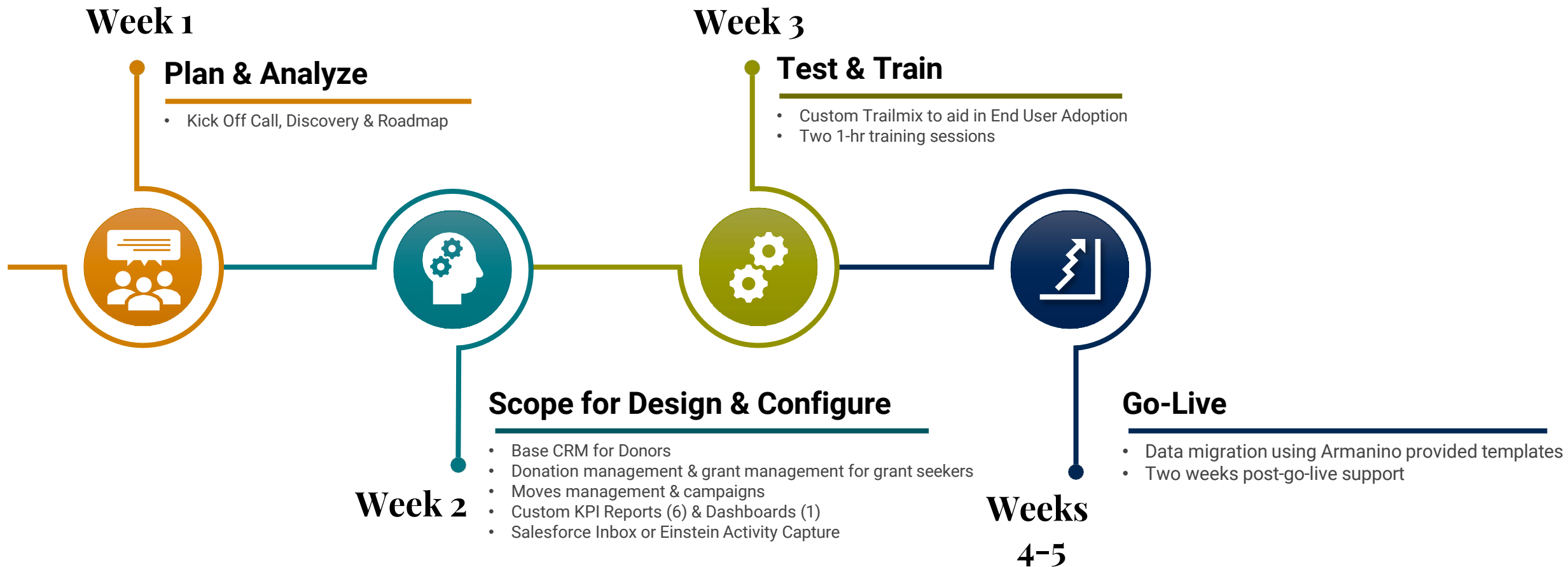


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Storytelling for Retention



Nonprofit Cloud Quickstart





NOT SURE WHERE TO START?

Salesforce Health Check

Overview

For clients already using Salesforce, Armanino offers a complimentary Health Check, assessing your return on investment (ROI) and risk review, with a focus on mission-critical items.

- Custom code versus configuration
- Custom field counts, data storage and API limits
- Effective use of process builders and workflows; and a high-level assessment of the components in use by the client.
- Effective use of out-of-the-box functionality
- Deployment status of recent Salesforce functionality
- Available user and feature licenses
- Lightning readiness, if applicable

What You Can Expect



2-3 Hours of User Interviews

Meet with Salesforce subject matter experts for 2-3 hours with your Salesforce user group.



Assessment Report

Report detailing the assessment performed and the health of client's Salesforce org, with explanations of critical items that may need attention, including a high-level estimate of the cost to implement the recommended actions



Thank you for attending
Additional Questions?

Reach out to us at:

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