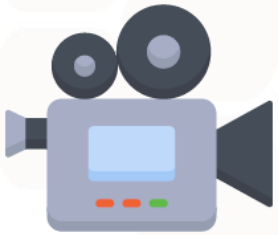
Simple Tips to Get the Most Out of Your Donor Data in Qgiv

Learn to raise more online

Want to learn how to raise more money online? We'd love to show you!

Visit us at **www.qgiv.com**



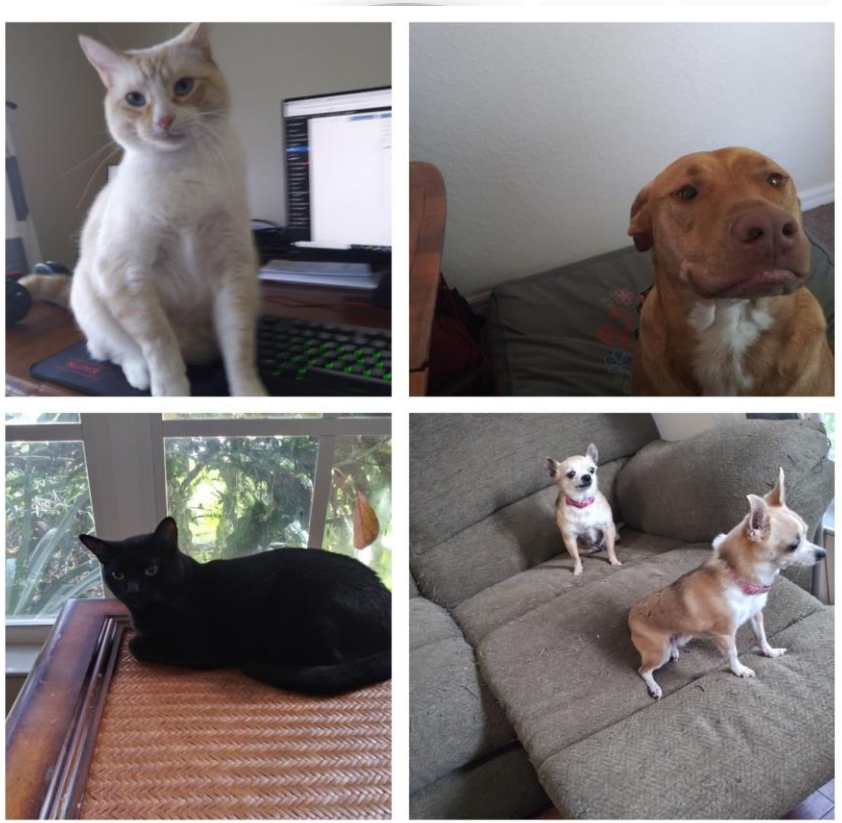
We're recording this webinar! We'll send you a copy after the webinar is complete.

Feel free to ask questions! Use the chat box for general discussion and the Q&A option below to ask your questions: we'll answer them in a Q&A section at the end of the presentation.

Share your highlights and takeaways with the #qgivwebinar hashtag, and make sure you follow @Qgiv!

Who’s Talking Today?

+ With Qgiv for three years
+ Digital marketing and optimizing the user journey are my areas of expertise
+ I enjoy volunteering
+ I have 5 animals: 3 dogs and 2 cats



Why focus on donor data?

Why is donor data important?

Monitor performance of fundraising campaigns and events.

Make better fundraising decisions with strategies backed by data.

Improve relationships with donors.

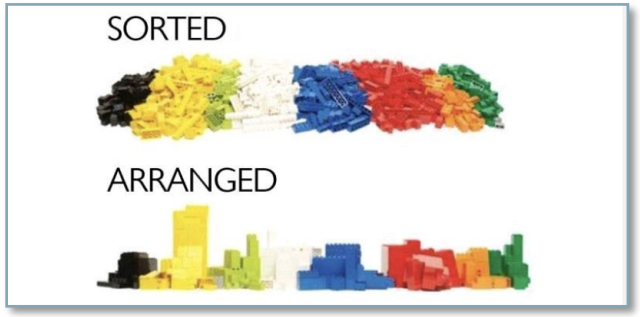
Your organization raises more!

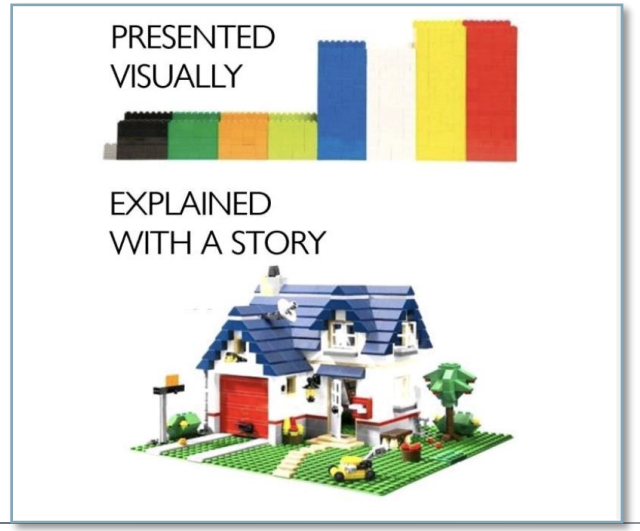
Data tells a story

Data without proper presentation looks like a giant mess.

As your organization learns to use data, you gain basic fundraising insights into your donors.

The goal is to tell a story with your data to view in-depth insights of how donors interact with your organization.





What we'll cover today

We'll take a look at all aspects of donor data and how your organization can use this information to improve your fundraising campaigns and events. We'll cover:

+ What data you need to look at
+ How to use data to improve your fundraising
+ Tools to track and collect donor information
+ Qgiv's data tools

What data do you need to look at?

Important donor data

Donor data is plentiful, but the most important data will help you monitor fundraising performance effectively!

+ Total amount raised
+ Total donations
+ Total donors or event attendees
+ New donors/recurring donors
+ New event attendees/returning event attendees
+ One-time vs. recurring donations
+ Donors preferred restrictions

Donor data you need

Take your fundraising to the next level with advanced donor data!

+ At-risk or lapsed donors
+ Donor retention rates
+ Donor churn rate
+ Donor levels: small, mid-level, and major donors

How to use this data to improve your fundraising

Track changes and compare performance

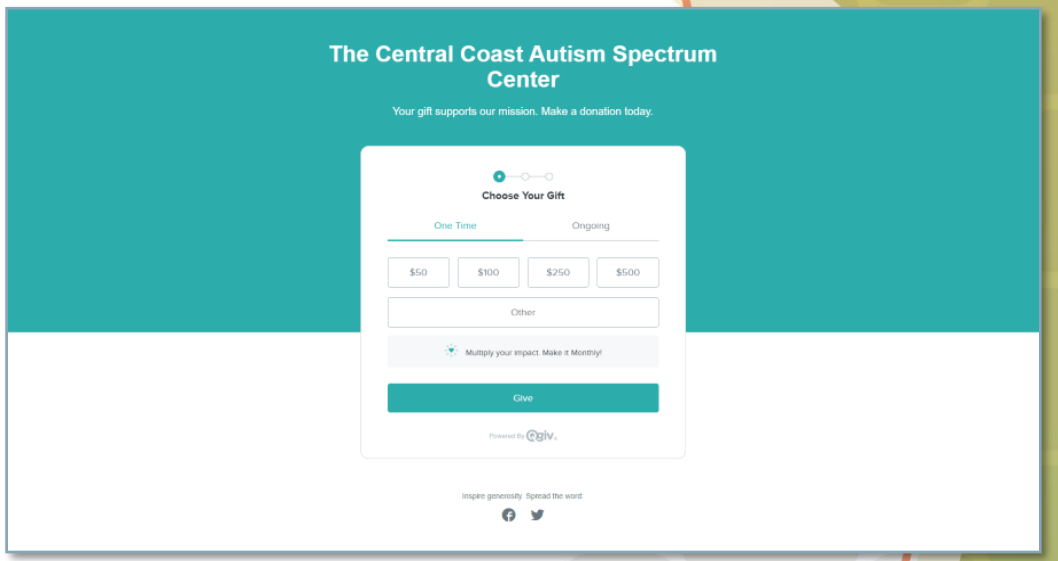
When updating donation forms and event forms, it's important to monitor changes to see if those changes had a positive or negative impact.

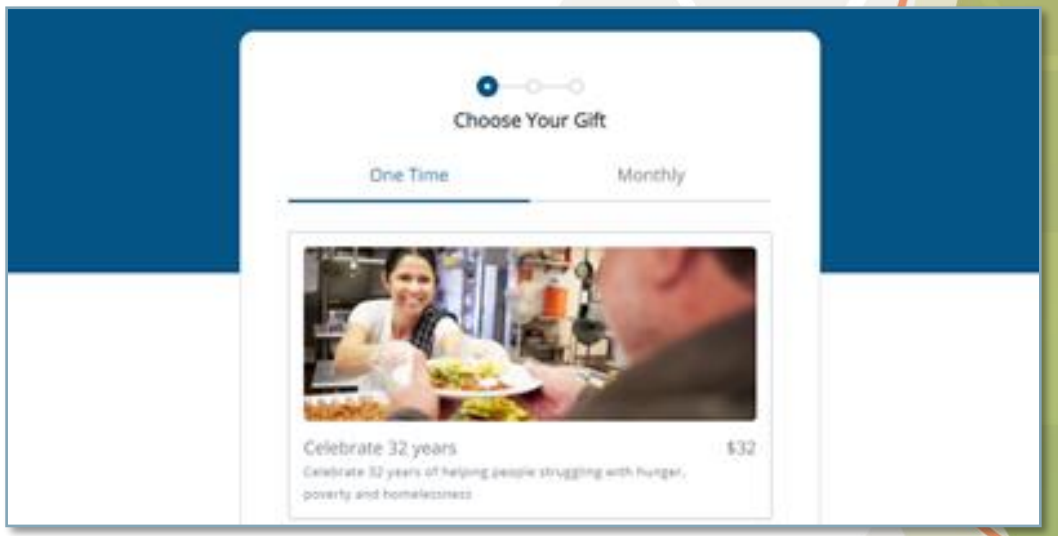
+ Did you add a new field?

+ A new image?

+ Change the landing page text?

Make sure to track performance after updates like this.



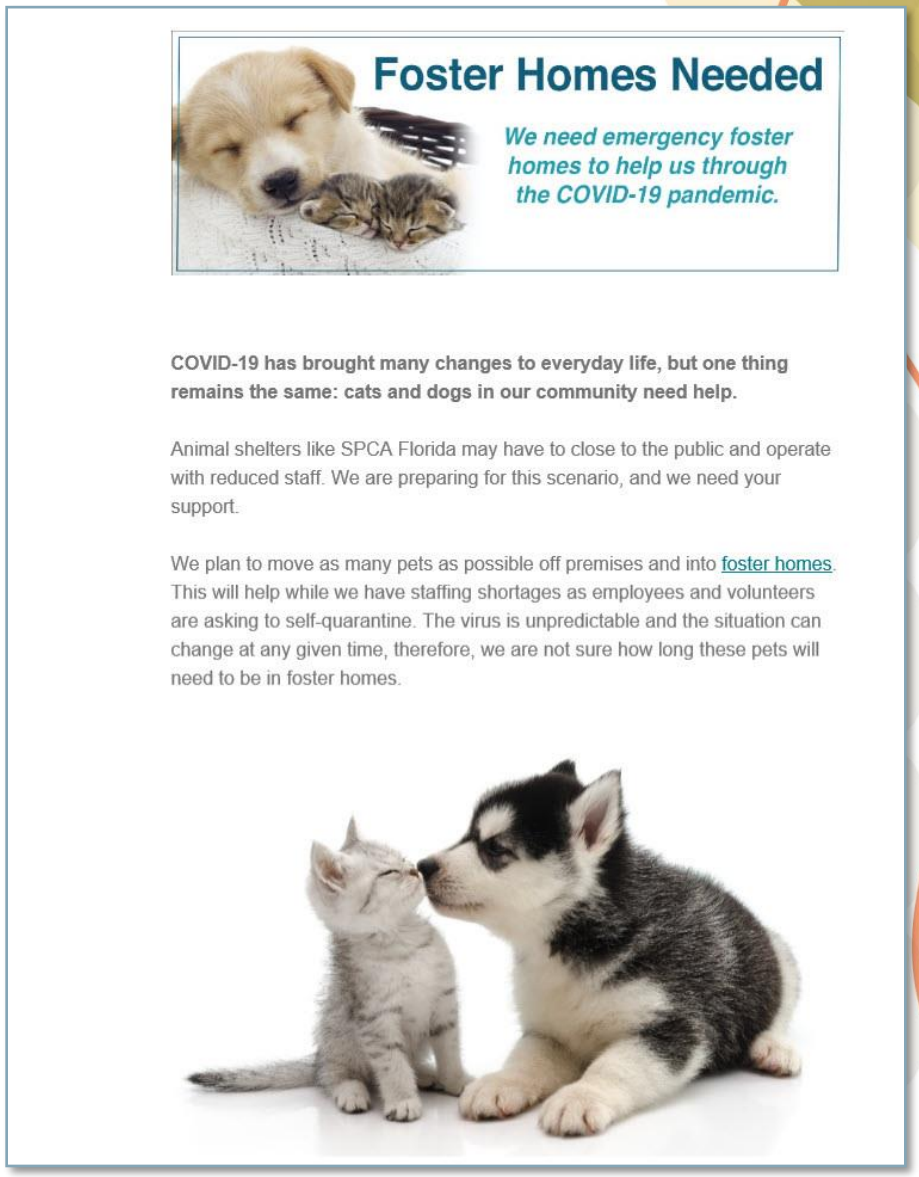


Improve fundraising appeals

Use donor data to improve the effectiveness of your fundraising appeals! One method is to send targeted fundraising appeals based on the interactions of the donor with your organization.

Send targeted appeals to:

+ One-time donors vs. recurring donors
+ Past event attendees vs. new attendees
+ Fundraisers from peer-to-peer events



Improve fundraising appeals cont.

You can also use your donor data to tailor fundraising appeals to certain audiences based on demographics and preferred giving channel.

Use donor data to identify:

+ Your donors' preferred giving channel.
+ Which messages resonate with your donors.
+ How often they give to your organization.

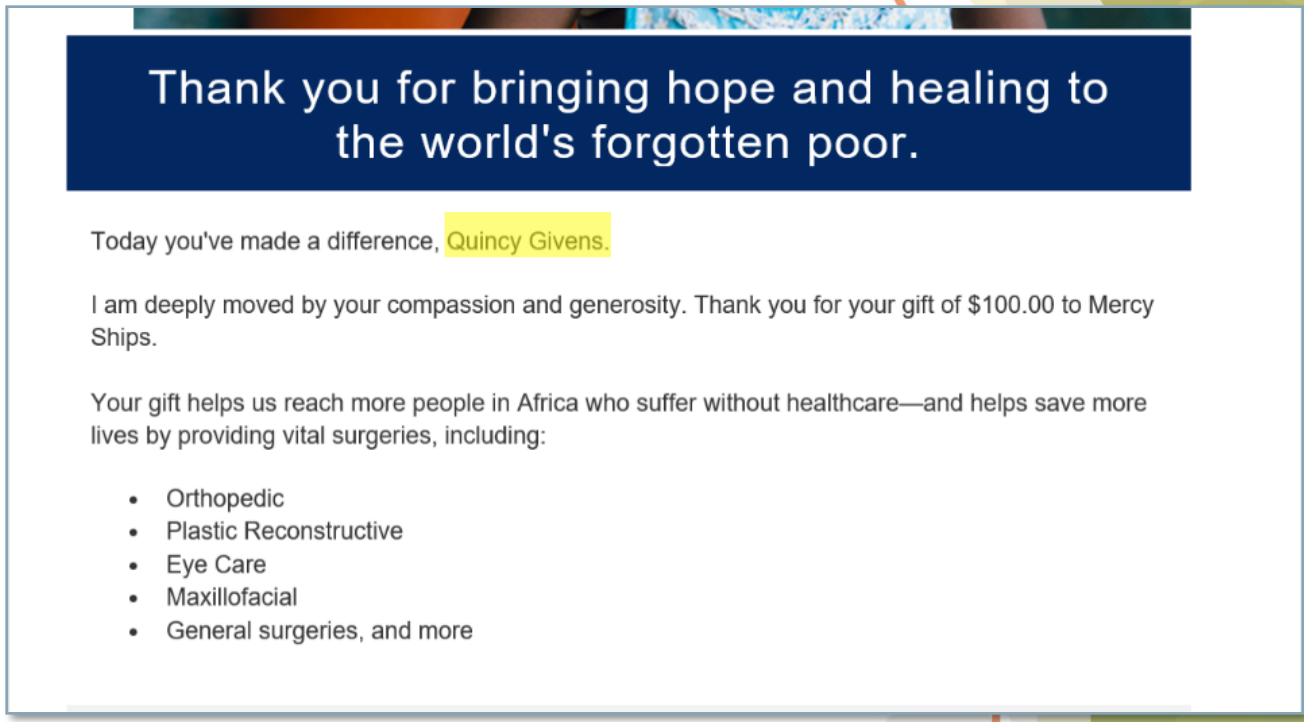
Use this data to determine the best time and giving channel to ask for another donation!

Grow relationships with donors

Growing your relationship with donors is easy when you use donor data appropriately.

Make donors feel special when you:

+ Add personalization to appeals and receipts.
+ Send donor summaries.
+ Call donors to thank them for their gift (if you collect phone number).



What else can you do?

Donor data is a wealth of knowledge and your organization can tap into this to raise more!

Donor data can help you to:

+ Identify current major donors and potential major donors.
+ Identify and re-engage lapsed donors.
+ Identify and engage at-risk donors.

Tools to track and collect donor information

Fundraising tools

Fundraising tools, such as Qgiv, collect high-level data for your organization.

+ Monitor performance of fundraising campaigns and events.
+ Collect donor information through forms.
+ Track new donors, recurring donors, at-risk donors, and lapsed donors.
+ Calculate donor lifetime value and acquisition costs.

CRM tools

Customer relationship management tools, or CRM, add extra management abilities for contacts.

+ Manage all aspects of your ecosystem including donors, volunteers, sponsors, grantees, and more.
+ Collect and add detailed information to donor records.
+ Other features like donor timelines, giving summaries, engagement scores, etc.

Other tracking tools

Your organization has access to a ton of other free tools to track donors!

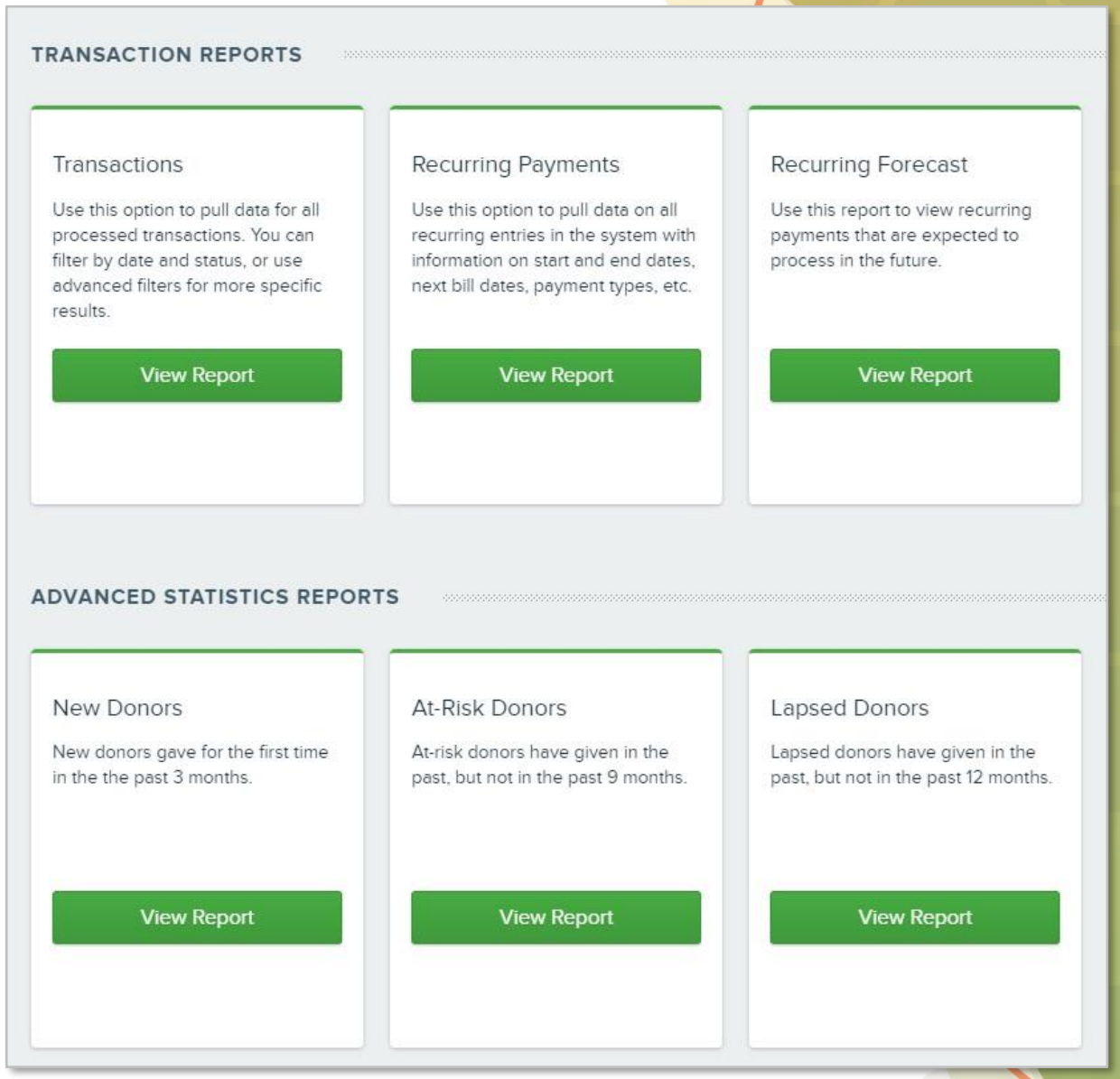
+ Google Analytics
+ Social Media
+ Google Search Console

Qgiv's data tools

Pre-built reports

Use our simple reports to get a bird's-eye view of your activities, like:

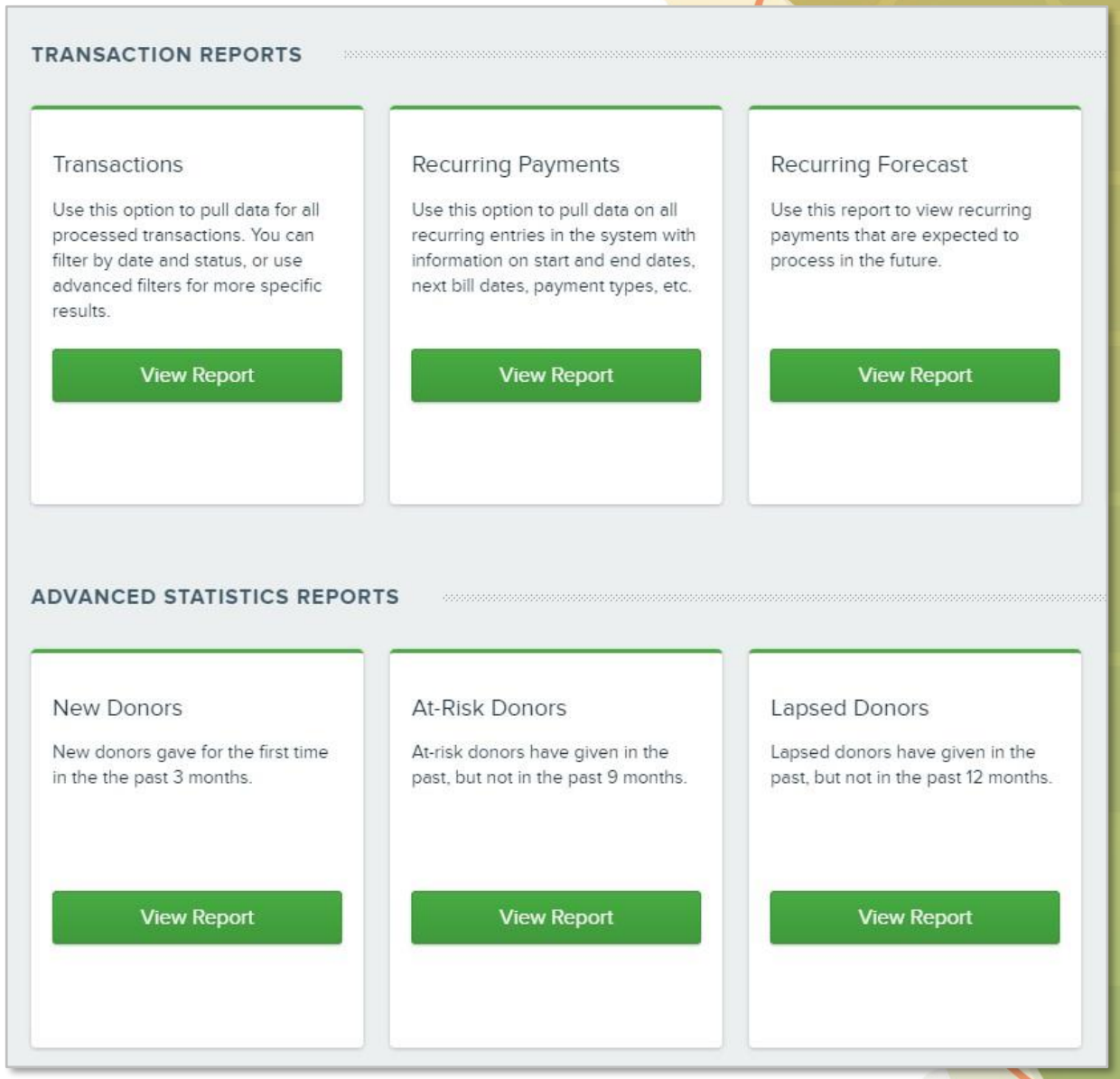
+ Transaction activities
+ Recurring payments
+ New, at-risk, and lapsed donors
+ Donations and event registrations
+ Save as a custom report
+ Access and run custom reports any time!



Custom report options

Use custom options to pull specific reports:

+ Event registrations processed today
+ New donors from last week
+ Donors who gave last year but haven’t given this year
+ Save complex filter sets as custom reports to save time later



How to use this data

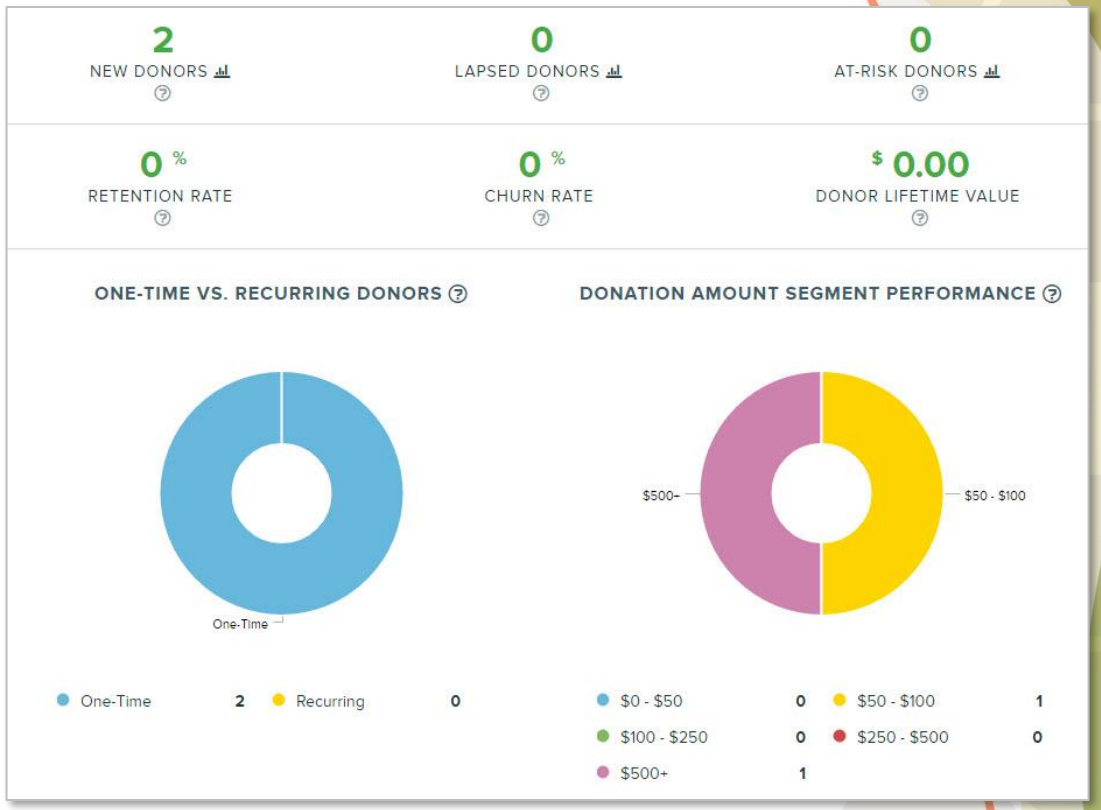
Understand your donors' patterns, behaviors, and recent activity. Use this data to:

+ Plan for last-minute event registrants
+ Target outreach to brand-new donors
+ Individually reach and engage at-risk donors
+ Ask recurring donors to renew their gift
+ Update recent donors on campaign activity
+ Re-engage lapsed donors or clean out your CRM

Advanced donor statistics

If you've been using your Qgiv account for a year, choose "Advanced Statistics" from the org-level dashboard menu to get a high-level view of your advanced stats. Run reports for:

+ Number of new donors
+ Number of lapsed or at-risk donors
+ Donor retention and churn rates
+ Donor lifetime value
+ Number of one-time vs recurring donors
+ Donation amount segment performance



How to use this data

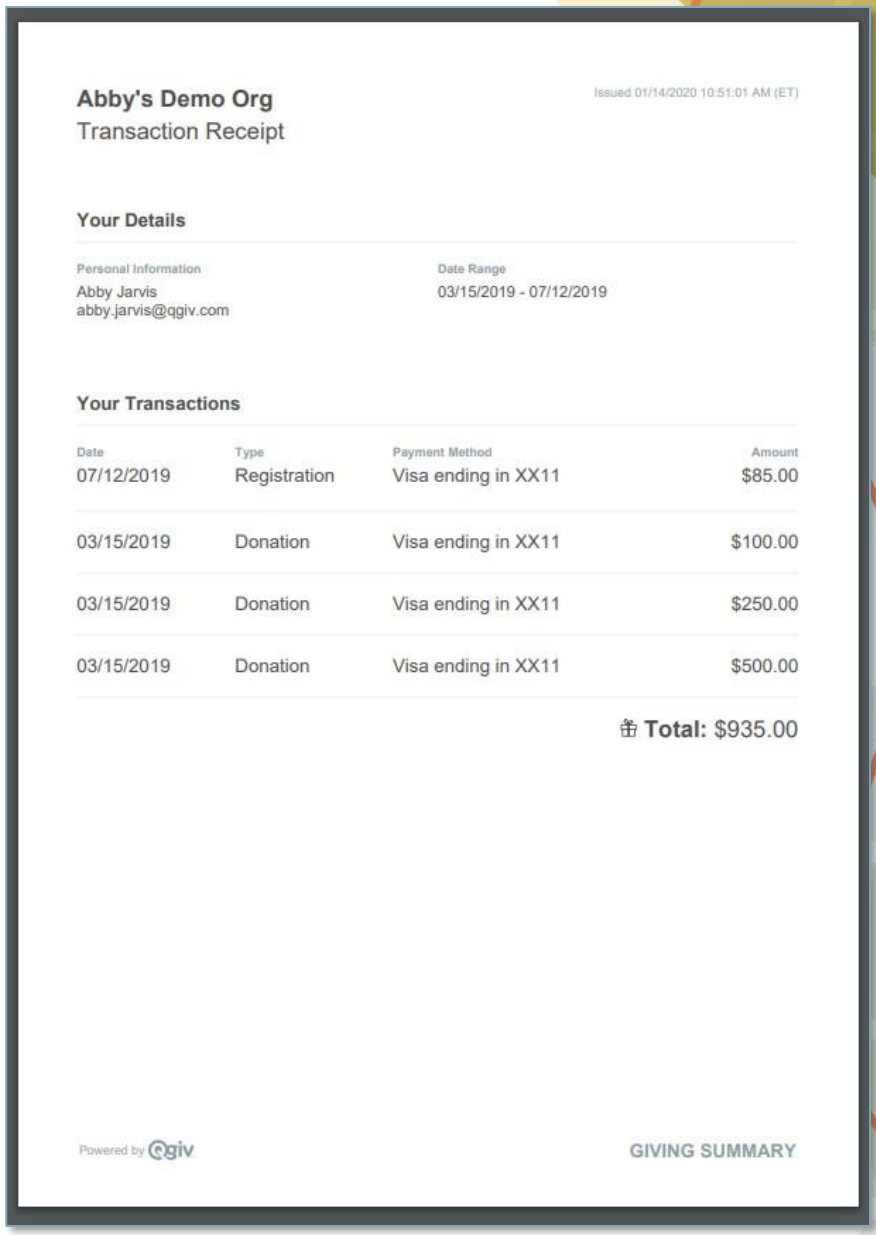
Use advanced statistics to:

+ Identify what attracts most new donors
+ Begin outreach for lapsed donors
+ Inform decisions around donor retention efforts and communication strategies
+ Calculate donor lifetime value vs. donor acquisition costs

Create and send donor summaries

If a donor asks you for their history, you can easily send them a donor summary. Simply:

+ Hover over “Reporting” in your dashboard and choose “Donor Summary
+ Choose names of donors (or set parameters for groups of donors) to whom you want to send summaries
+ Use the interface to create the emails your donors will receive with their summaries attached
+ Preview and send summaries



Abby's Demo Org
Transaction Receipt

Issued 01/14/2020 10:51:01 AM (ET)

Your Details

Personal Information
Abby Jarvis
abby.jarvis@qgiv.com

Date Range
03/15/2019 - 07/12/2019

Your Transactions

Date	Type	Payment Method	Amount
07/12/2019	Registration	Visa ending in XX11	$85.00
03/15/2019	Donation	Visa ending in XX11	$100.00
03/15/2019	Donation	Visa ending in XX11	$250.00
03/15/2019	Donation	Visa ending in XX11	$500.00

Total: $935.00

Powered by Qgiv

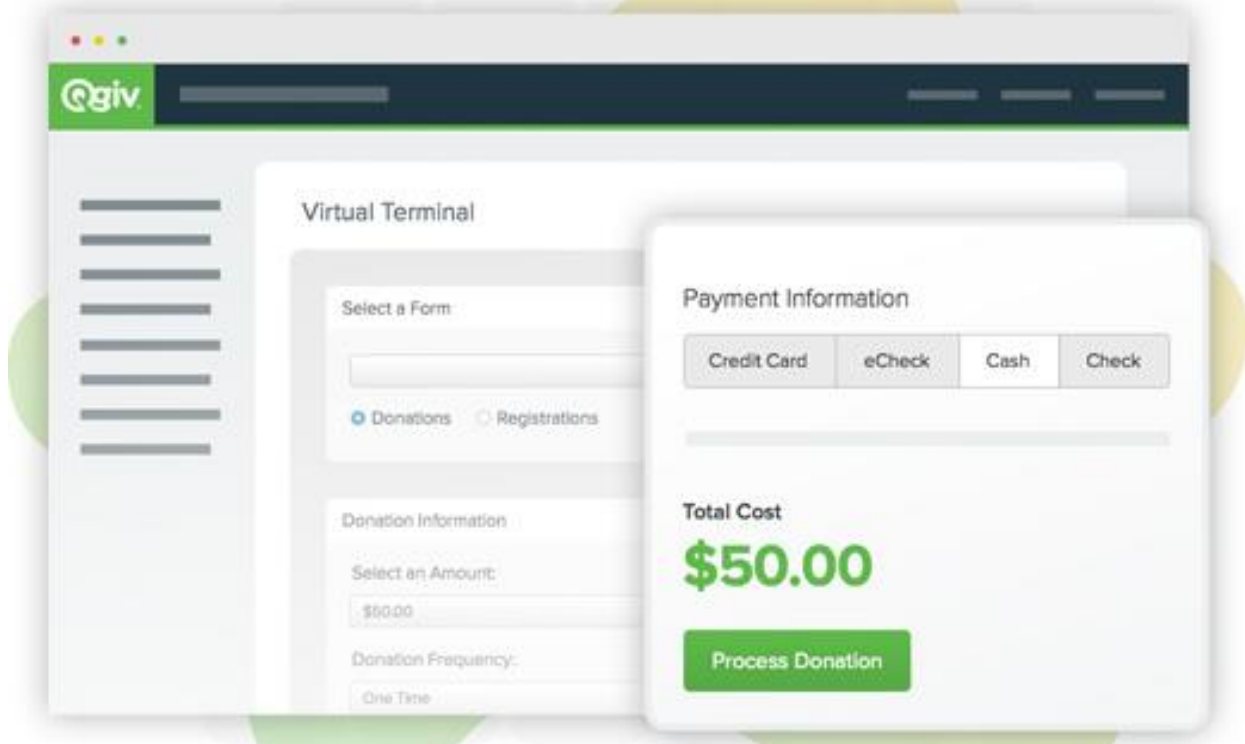
GIVING SUMMARY

Import or process offline transactions

Use our simple template to upload batches of cash and check donations to your account!

You can also take in-person gifts of cash, card, or check through the Virtual Terminal, which is helpful when you:

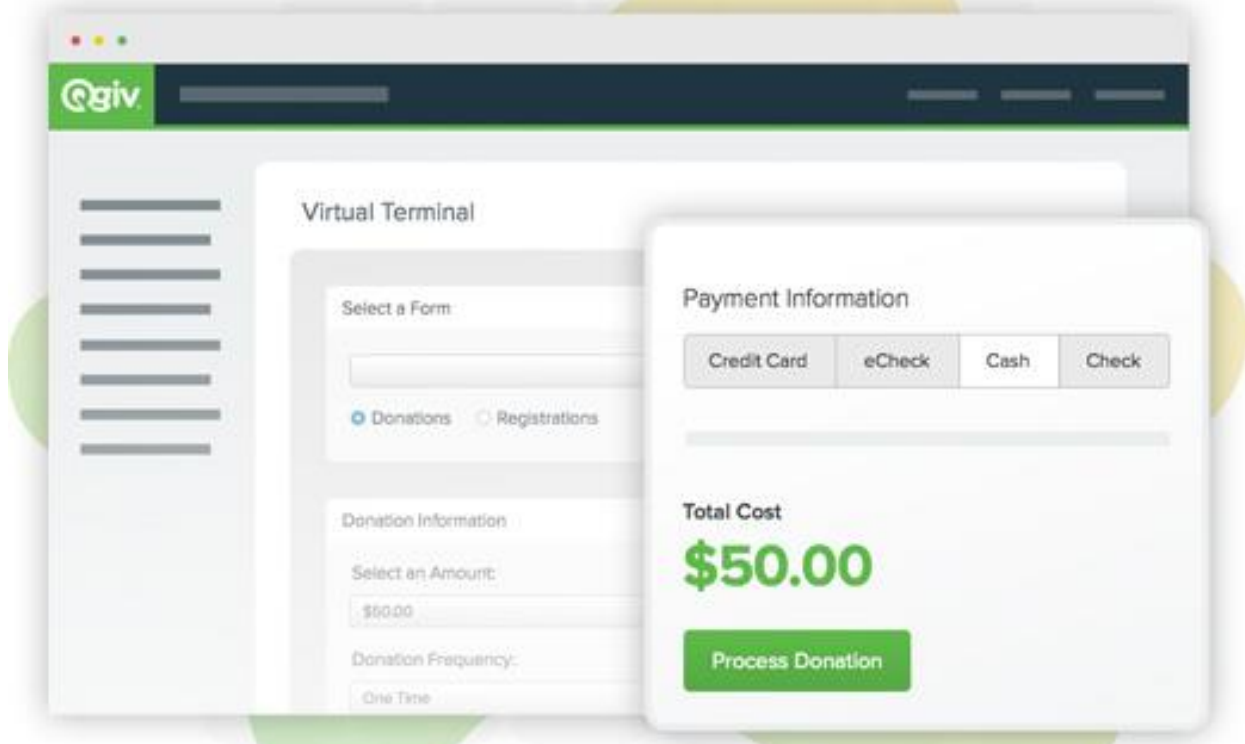
+ Need to take an in-person donation
+ Want to take gifts on-site at an event
+ Get a surprise donation from someone



Offline donations contd.

Once your offline donations and registrations are uploaded, they're reflected in:

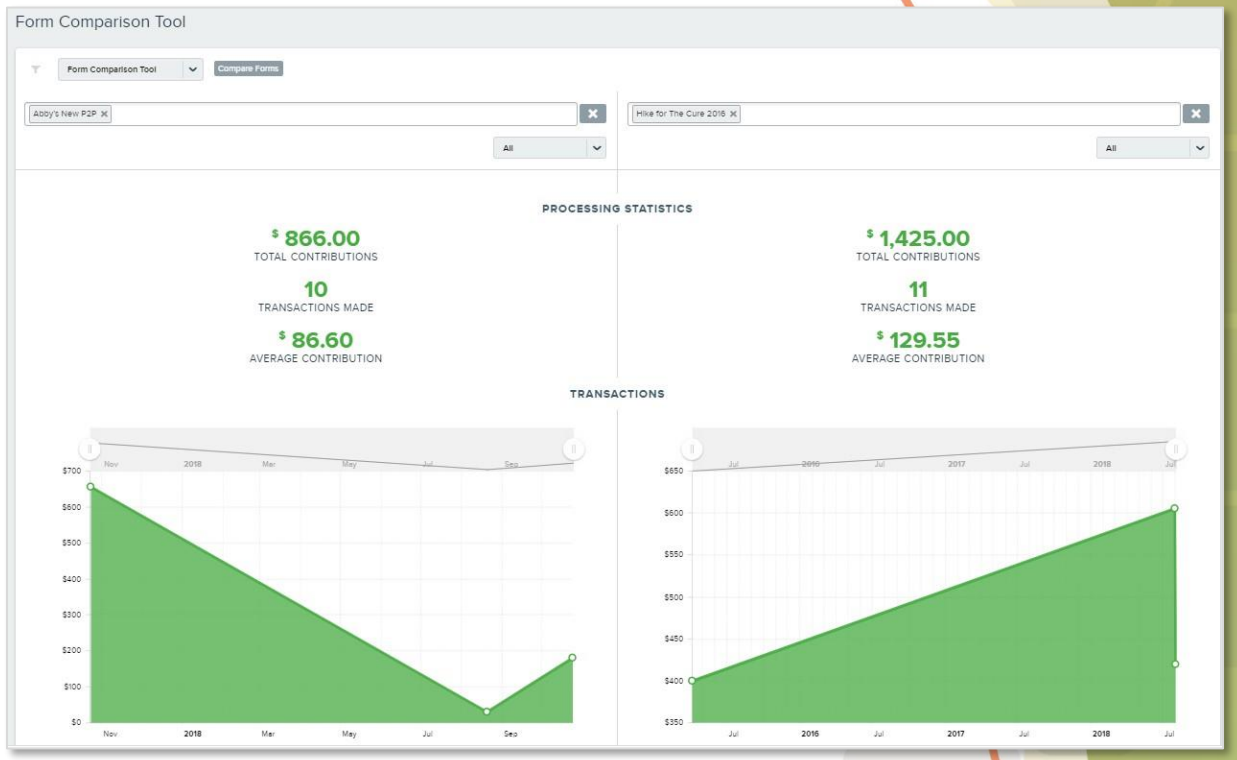
+ Campaign thermometers
+ Peer-to-peer thermometers and progress bars
+ FundHub pages (which track multiple pages and forms associated with a single campaign)
+ Reports



Form comparison tool

To compare forms, go to your organization's main dashboard and choose "Form Comparison Tool" from the drop-down.

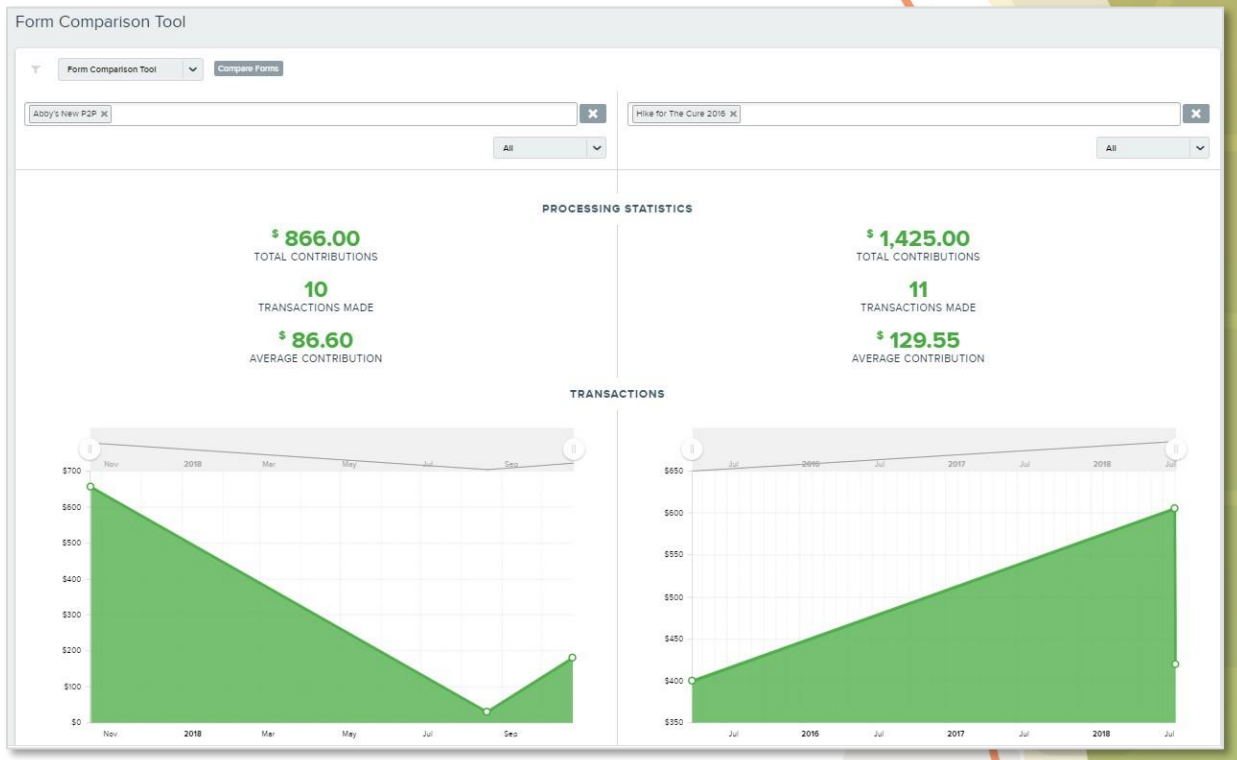
+ Compare campaigns year-over-year
+ Compare performance of different forms
+ Run A/B tests
+ Learn what successful forms and events have in common



How to use this data

Understand your donors' preferences and more by comparing forms!

+ Try new things and quantify your success by running A/B tests
+ Experiment with suggested gift amounts
+ Identify what works and apply it to other forms and events
+ Tweak events and see what works



Integrations

Save time when you use Qgiv's integrations with other tools to:

+ Update your CRM with donor updates, patterns, and donation history
+ Track donors' involvement with events and other fundraising campaigns
+ Send fundraising emails and updates to different segments of donors

CRM integrations

Automatically sync your Qgiv account to any of these top CRMs in the industry! You can also run syncs manually.

Email integrations

Send targeted emails to your different donor segments and improve open rates, boost donor retention rates, and build stronger donor relationships.

Constant Contact

Campaign Monitor

mailchimp

KLAVIYO

emma

Accounting integrations

Pulling reports from our system is easy for your bookkeeping staff. Know what's even easier? Integrating your Qgiv account with Quickbooks Online. It's one of the nonprofit industry's top accounting services!

Endless possibilities

Our integration with Zapier makes it possible to connect your Qgiv account to hundreds of other services your nonprofit is already using.

Data package pricing

Paid Quarterly
$10/month

Paid Monthly
$15/month

+ All standard fundraising features
+ CRM integrations
+ Email integrations
+ Offline donations and registrations
+ Custom reports
+ Advanced statistics
+ Donor summaries
+ Form comparison tool

Are you a Qgiv customer? Email support@qgiv.com

Want to talk to us about using Qgiv? Email contactus@qgiv.com

Have questions about best practices? Check out qgiv.com/blog!

Questions?