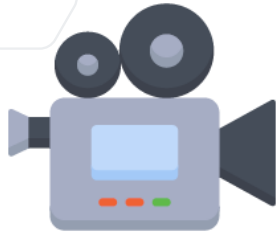


Dashboards that Tell a Story



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions



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



+ **Feel free to ask questions!** Use the Q&A option to ask questions and the chat option for general discussion: we'll answer all questions in a Q&A portion at the end of the presentation.



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



Meet the Speaker



Mike Cross, UI / UX Designer

Mike is a UI/UX Designer at Qgiv, a leading fundraising platform for nonprofits. He has a passion for designing systems that offer a great experience to its users. When Mike's not working, he sings in a barbershop chorus and spends time with his wife and two kids.



Donation Forms | Event Registration
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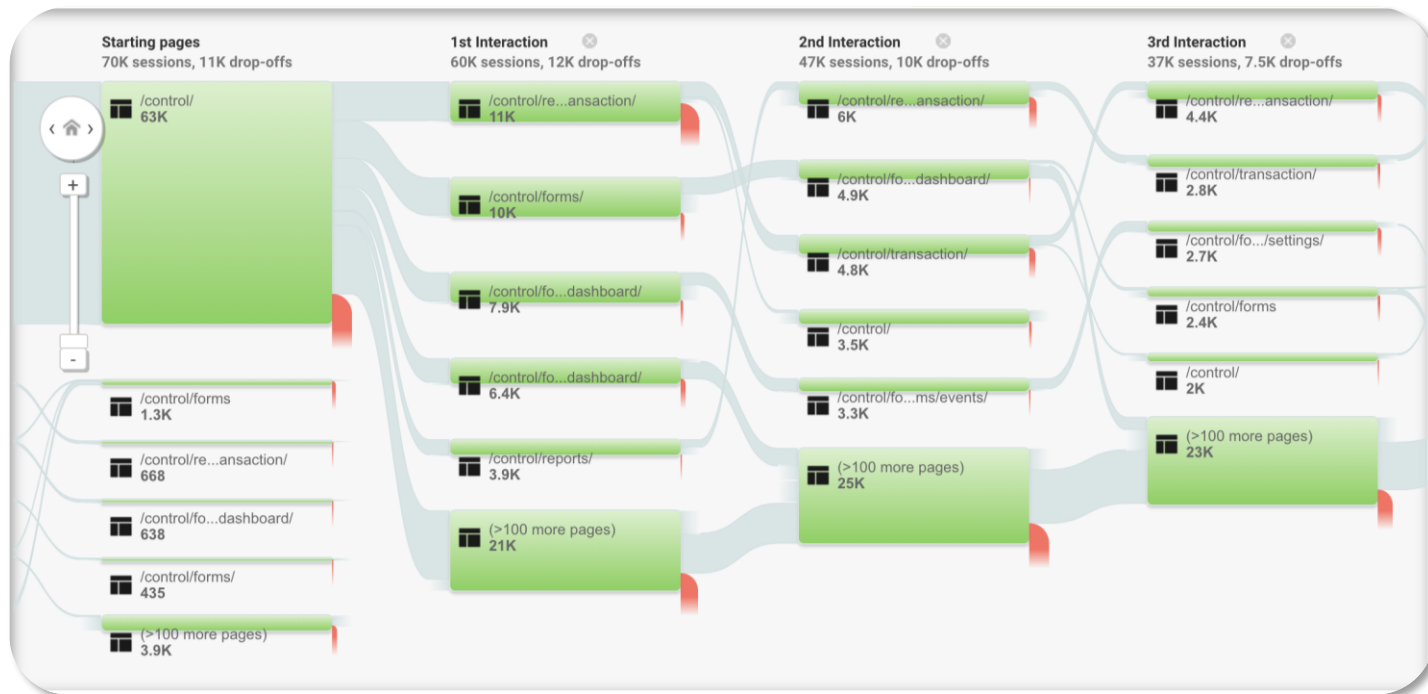
How did we get here?



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1. Google Analytics

- + Dashboard was a steppingstone
- + Average page view of 1 minute
- + Skip data for transaction details
- + Same data across roles



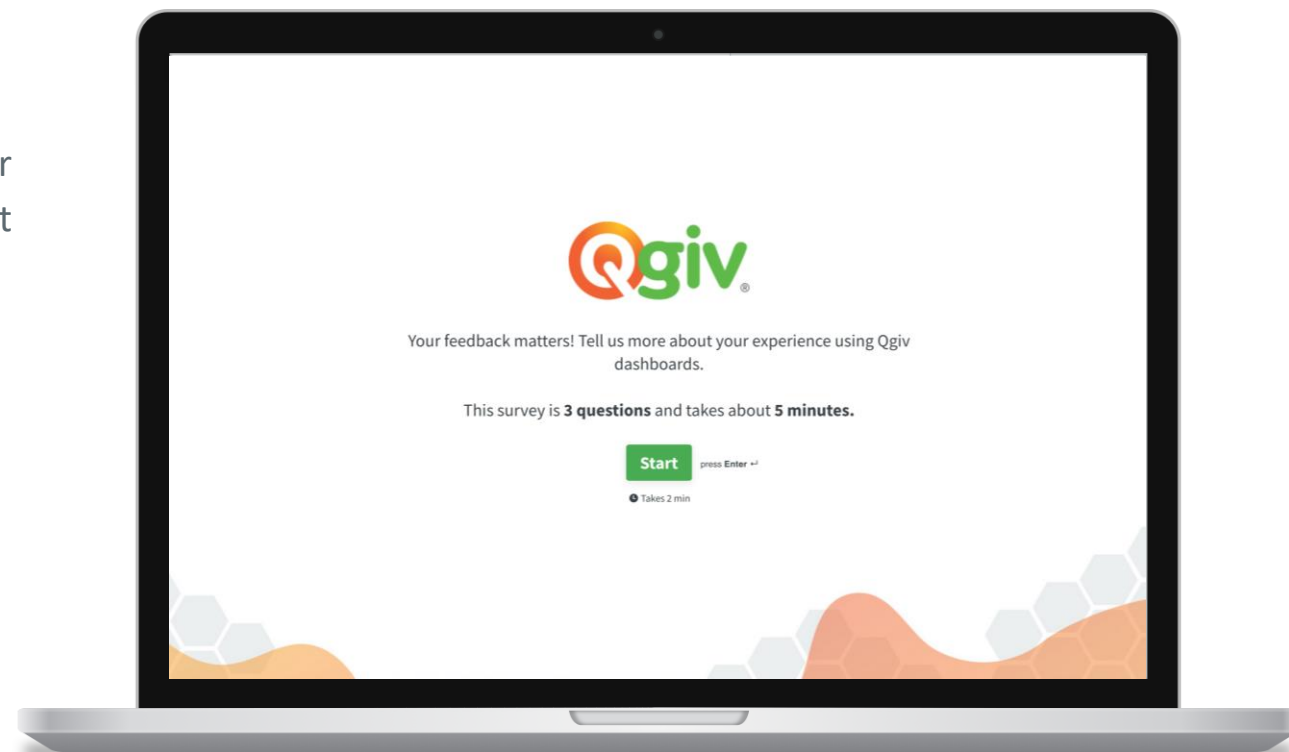
Page ?	Pageviews ? ↓	Unique Pageviews ?	Avg. Time on Page ?	Entrances ?	Bounce Rate ?	% Exit ?
	672,756 % of Total: 100.00% (672,756)	314,767 % of Total: 100.00% (314,767)	00:01:29 Avg for View: 00:01:29 (0.00%)	72,529 % of Total: 100.00% (72,529)	2.24% Avg for View: 2.24% (0.00%)	10.78% Avg for View: 10.78% (0.00%)
1. /control/	91,545 (13.61%)	66,227 (21.04%)	00:01:07	64,887 (89.46%)	0.77%	12.41%
2. /control/reports/transaction/	69,007 (10.26%)	23,082 (7.33%)	00:02:01	834 (1.15%)	10.32%	18.04%
3. /control/transaction/	56,920 (8.46%)	13,358 (4.24%)	00:01:37	458 (0.63%)	35.03%	10.82%





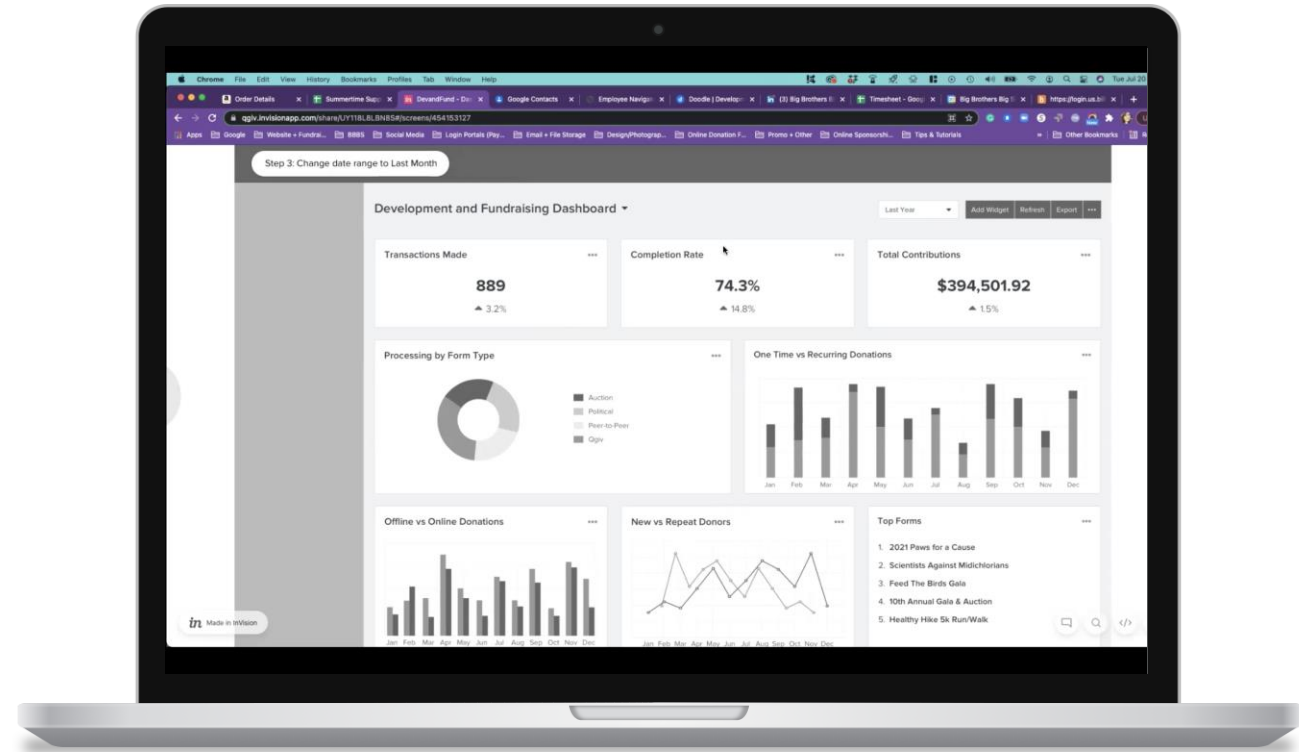
2. User Survey Results

- + Users wanted to **drill down into charts**
 - “I would love to be able to click a section of a pie chart, or a date in the graph, and be able to see detailed info about the transactions in that category.”
- + Users are interested in **customization**
 - “100% customization option”
 - “Ability to add customizable widgets”
- + Users want more info about **donation forms and donations**
 - “Completion Rates & Abandonment Rates for each form are the number one things I want to know.”
 - “Just put "Everything Donor" on one dashboard group, with date range settings, so we can see it all at once.”



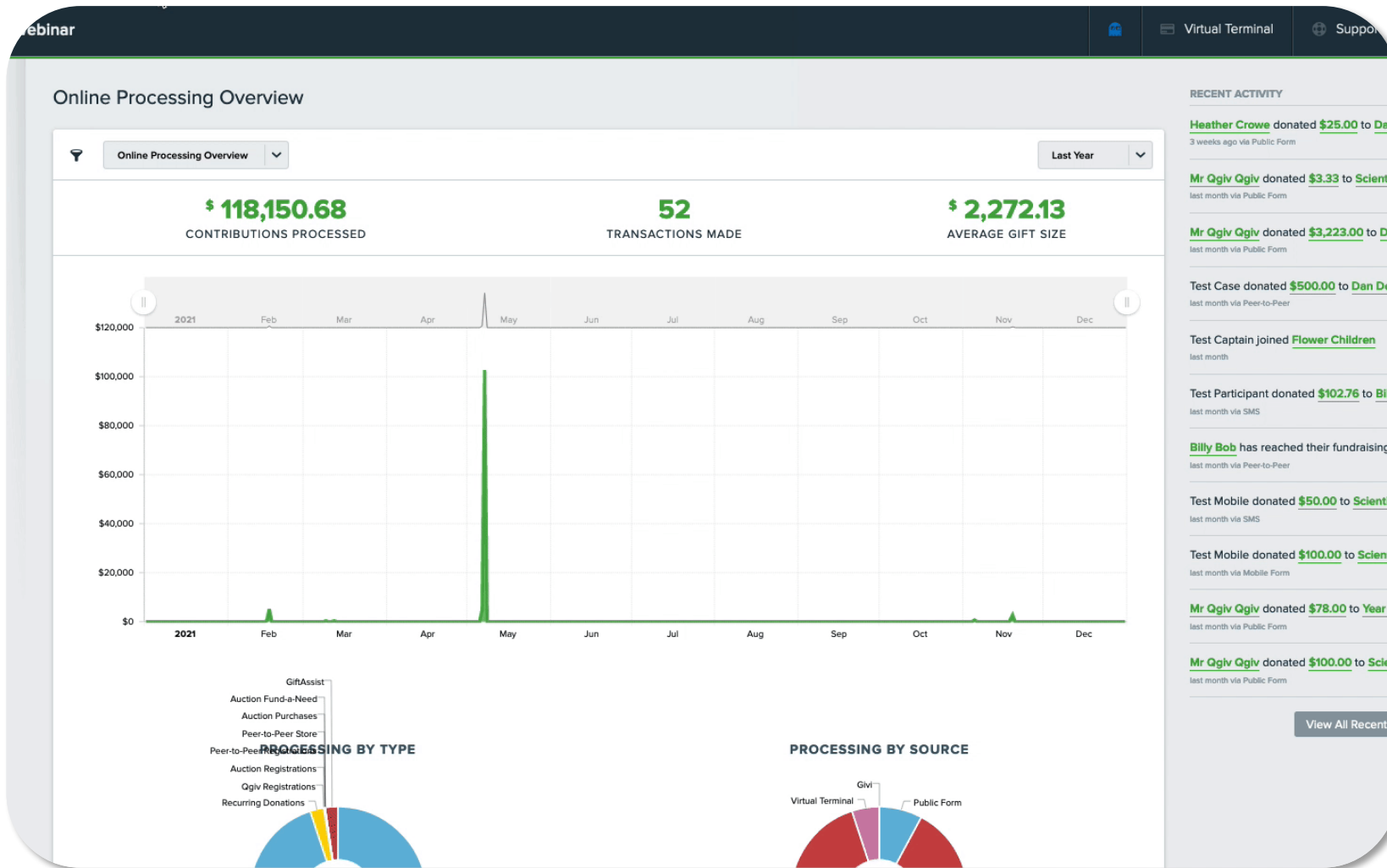
3. User Testing

- + Completed 14 total user tests
- + 100% felt adding insights was intuitive
- + 64% thought insight delta was clear
- + 86% felt dashboard was intuitive, clear, and concise with the data



Let's Recap

- ✓ **Google Analytics** to understand how users use the dashboard
- ✓ **User Surveys** to gather feedback on the legacy dashboard
- ✓ **User Testing** to gather feedback using high fidelity prototype
- ✓ **Data Research** to optimize data shown on dashboard
- ✓ **Countless Conversations** to give dashboards that tell a story



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Qgiv Mike's Webinar Virtual Terminal Support Dan Demo Foun...

Online Processing Overview

Last Year Jan 1, 2021 - Dec 31, 2021 [+ Add Data Insight](#)

Contribution Total
Jan 1, 2021 - Dec 31, 2021

\$118,150.68
▲ 1951.8% from 2020

Contribution Count
Jan 1, 2021 - Dec 31, 2021

52
▼ 16.1% from 2020

Average Contribution Amount
Jan 1, 2021 - Dec 31, 2021

\$2,272.13
▲ 2346.4% from 2020

Contributions by Date

Jan 1, 2021 - Dec 31, 2021

Month	Contribution Amount
Jan	~\$100
Feb	~\$200
Mar	~\$100
Apr	~\$100
May	~\$115,000
Jun	~\$100
Jul	~\$100
Aug	~\$100
Sep	~\$100
Oct	~\$100
Nov	~\$200
Dec	~\$100


Recent Transactions

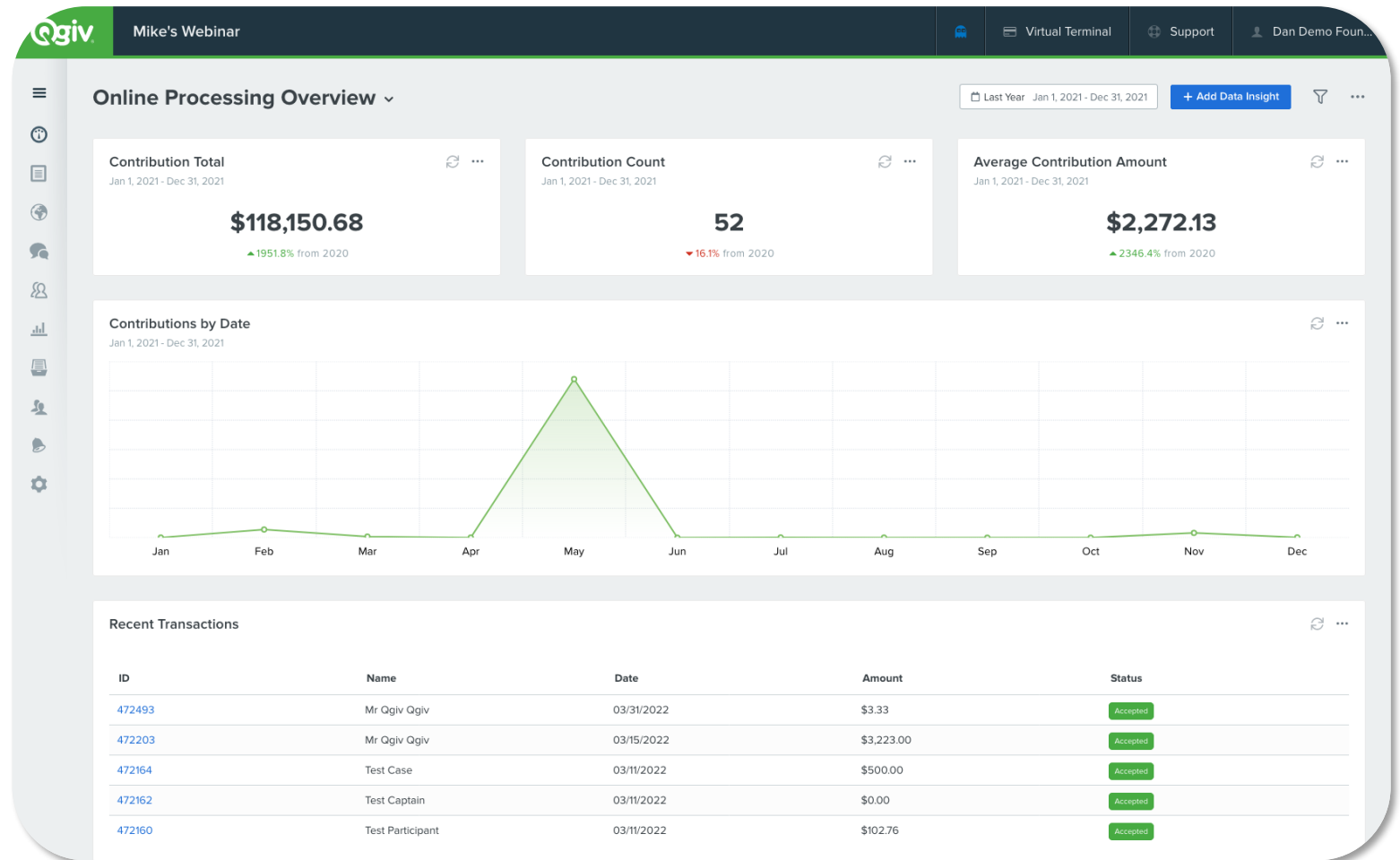
ID	Name	Date	Amount	Status
472493	Mr Qgiv Qgiv	03/31/2022	\$3.33	Accepted
472203	Mr Qgiv Qgiv	03/15/2022	\$3,223.00	Accepted
472164	Test Case	03/11/2022	\$500.00	Accepted
472162	Test Captain	03/11/2022	\$0.00	Accepted
472160	Test Participant	03/11/2022	\$102.76	Accepted





What's New?

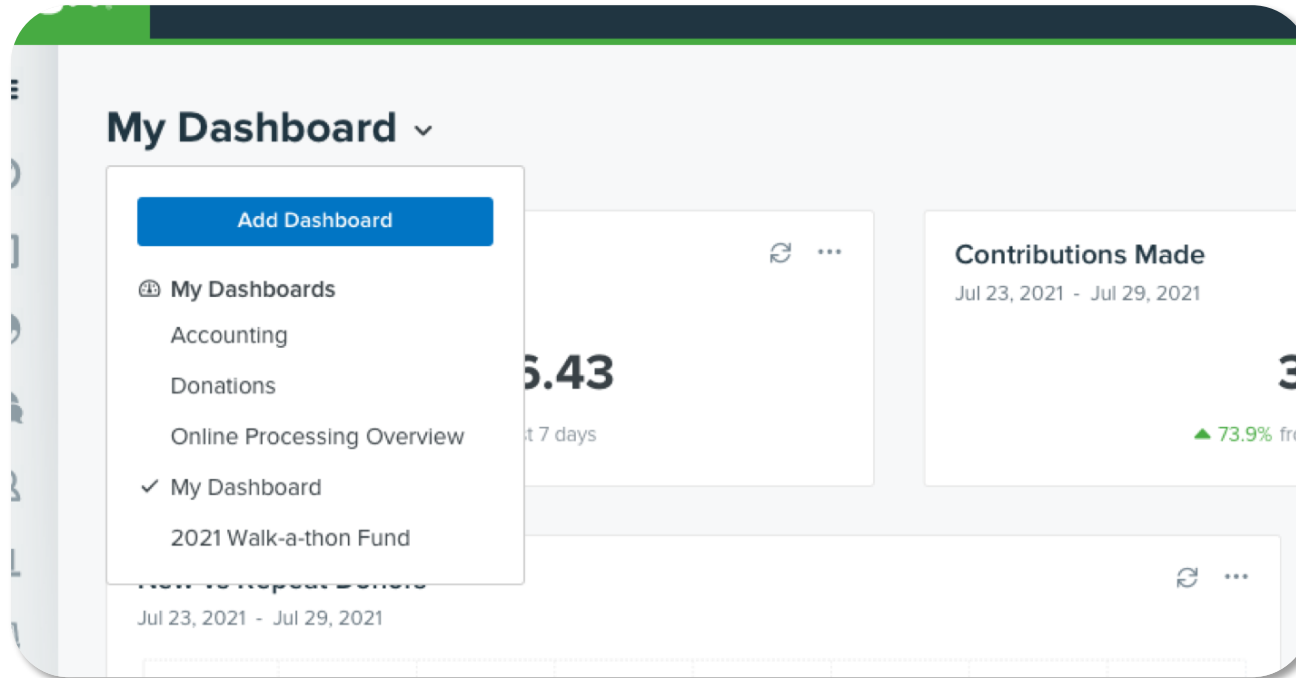
- + Refreshed look and feel
- + User created dashboards
- + Data insights
- + Dashboard customization
- + Report connection
- + Dashboards per user
- + Data performance
- + **LOADS** more features 
 - Compare data
 - Dashboard themes
 - Chart types
 - Data insight info
 - And more!



Closer Look



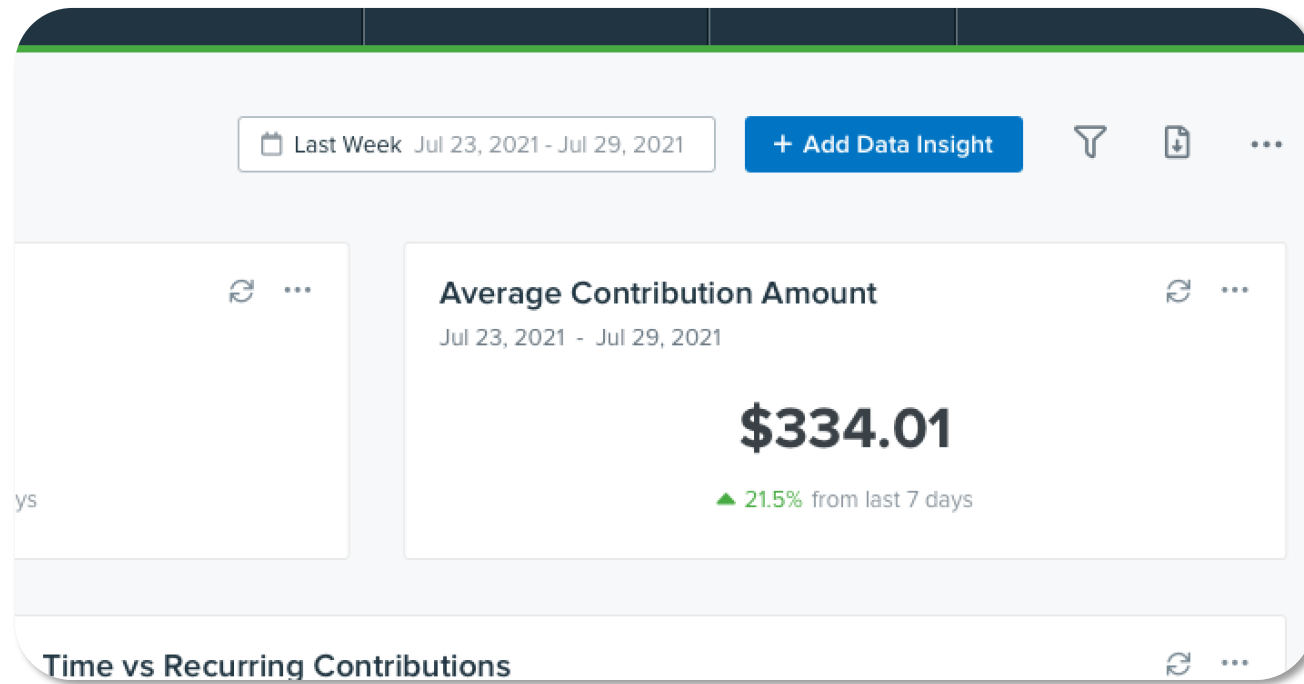
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Change It Up

Add, remove, or swap dashboards to show the data you need.

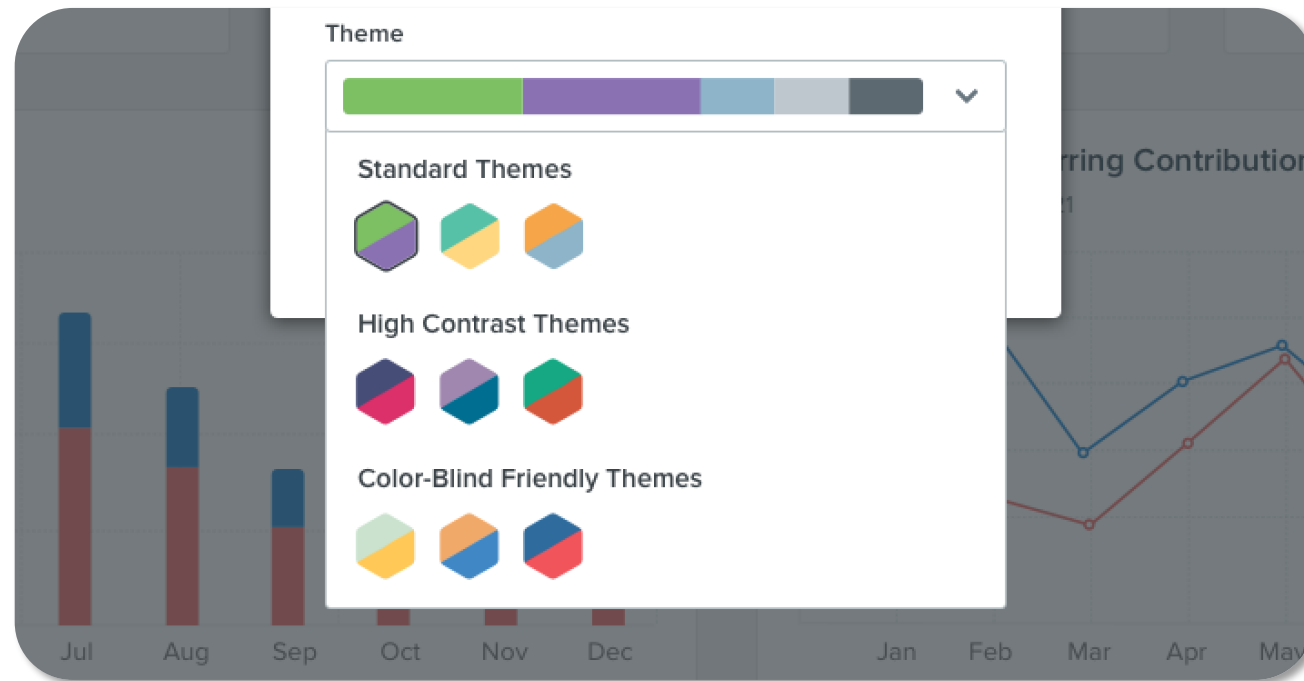




Customize It

Add new data insights to tell your story.

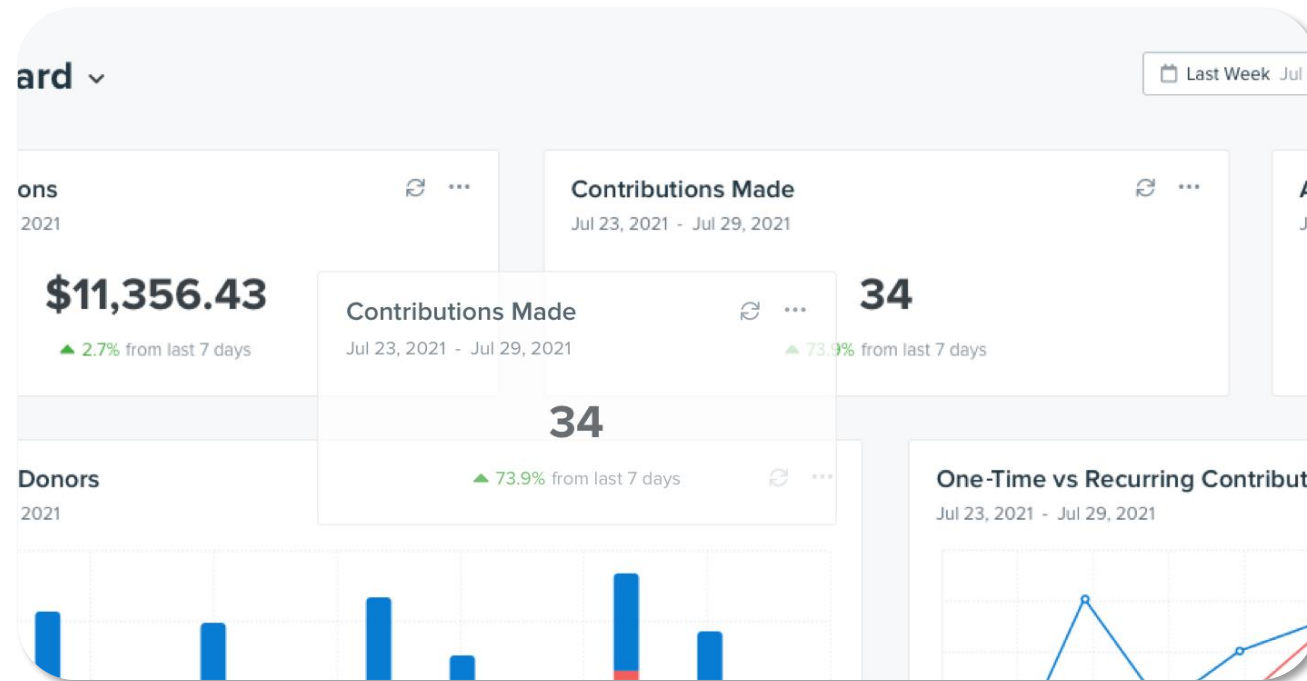




Beautify It

Pick a dashboard theme that's right for you.





Organize It

Drag and drop your data insights throughout your dashboard.



Donation Forms | Event Registration
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Search By Name or ID

Advanced Filtering Range All Status Accepted

ID	Date	Name	Status	Method
468089	08/13/2021	Mr Qgiv Qgiv	Accepted	Visa
468079	08/13/2021	Mr Qgiv Qgiv	Accepted	Visa
468029	08/10/2021	Michael Corinthos	Accepted	MasterCard
468027	08/10/2021	Mike Smiley	Accepted	MasterCard
467872	07/28/2021	Sally Smith	Accepted	E-Check
467871	07/28/2021	John Smith	Accepted	E-Check
466919	05/07/2021	Mike Cross	Accepted	Visa

Report on It

Click on your data to instantly view associated reports.



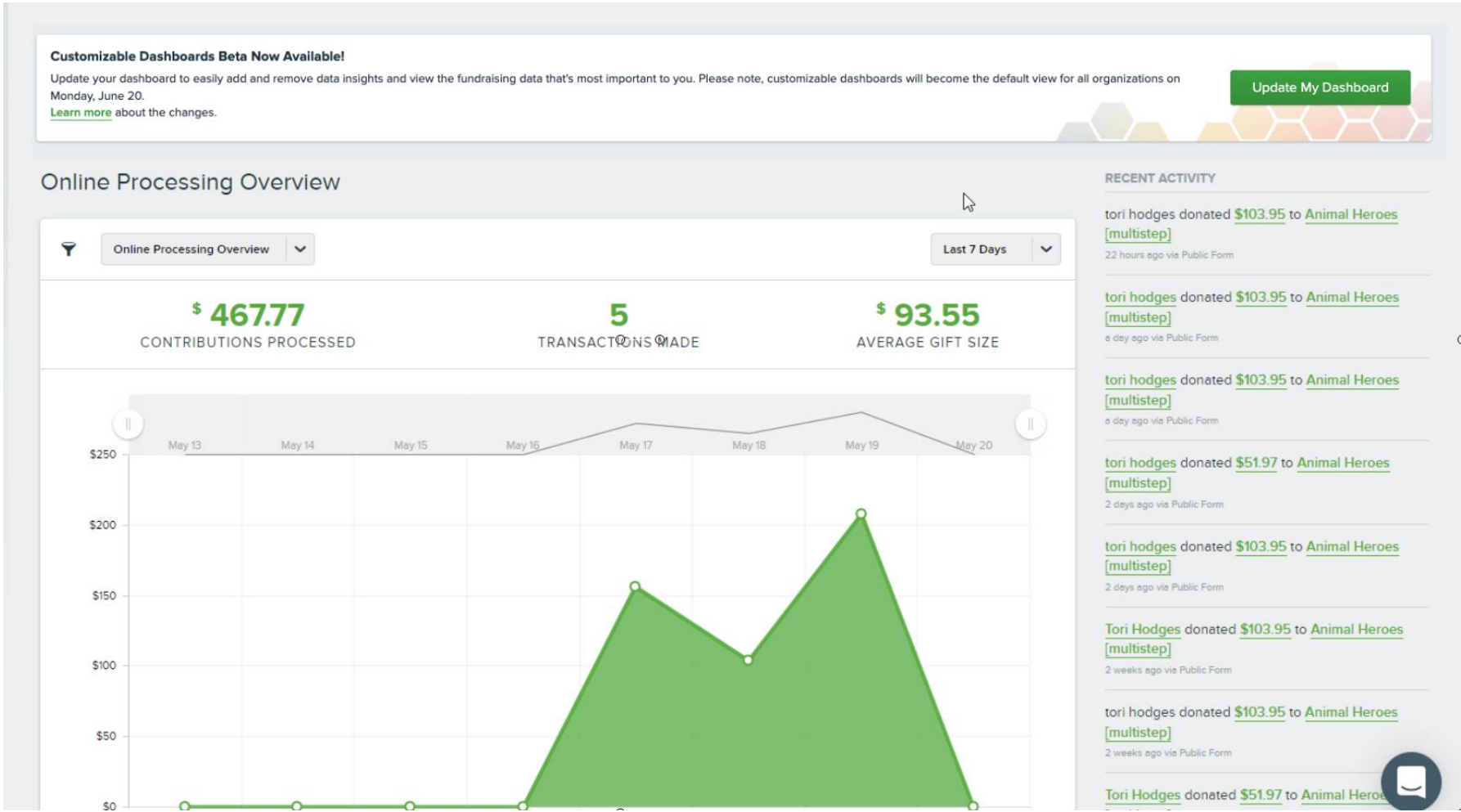
Let's Dive In

A Detailed Walkthrough



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How to Access Customizable Dashboards



How to Access Customizable Dashboards

Customizable Dashboards Beta Now Available!


Update your dashboard to easily add and remove data insights and view the fundraising data that's most important to you. Please note, customizable dashboards will become the default view for all organizations on Monday, June 20.

[Learn more](#) about the changes.

Update My Dashboard

- + Admin users in your Qgiv account can opt in using the banner.
- + Once updated, all users will be able to see the customizable dashboards.
- + Some settings will not carry over.
- + Customizable dashboards will become the default view for all organizations on Monday, June 20.

What's Included in Starter?



Just starting out? Get your feet wet with online fundraising!
(Best for organizations processing less than \$50,000 annually)

\$0/MO

INCLUDES

- + Donation Forms
- + Event Registration & Management
- + Award-Winning Customer Service

- + Up to 3 custom dashboards
- + 2 preconfigured dashboards: Online Processing Overview and Detailed Breakdown
- + Insight performance over time
- + Dashboard filters

What's Included in Giving Essentials?

Giving Essentials

\$25/MO OR \$60/QTR Save \$15

- + Integrations & Reporting
- + Donation Forms
- + Event Registration & Management
- + World-Class Customer Experience

✓ PROCESSING FEE:

- 3.95% (Qgiv + Merchant)
- \$0.30 per transaction
- Add 1% for American Express

✓ ECHECK FEE:

- 1.95% (Qgiv + Merchant)
- \$0.50 per transaction

Everything in the Starter package, plus:

- + Unlimited, customizable dashboards
- + Additional preconfigured dashboard options: advanced statistics, peer-to-peer events, and auction events*
- + Insight comparison tools for forms and events
- + Access to advanced statistics including: at-risk donors, churn rate, donor lifetime value, lapsed donors, new donors, and retention rate.

* please note: you'll need to have hosted at least 1 peer-to-peer or auction event with Qgiv and have the Giving Essentials package enabled to see these preconfigured dashboards.

Giving Essentials

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- + Donation Forms
- + Event Registration & Management
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✓ ECHECK FEE:

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- \$0.50 per transaction

+ Text Fundraising

\$129/MO OR \$297/QTR Save \$90

✓ PROCESSING FEE:

- 3.95% (Qgiv + Merchant)
- \$0.30 per transaction
- Add 1% for American Express

✓ ECHECK FEE:

- 1.95% (Qgiv + Merchant)
- \$0.50 per transaction

+ Peer-to-Peer

\$229/MO OR \$597/QTR Save \$90

✓ PROCESSING FEE:

- 4.95% (Qgiv + Merchant)
- \$0.30 per transaction
- Add 1% for American Express

✓ ECHECK FEE:

- 2.95% (Qgiv + Merchant)
- \$0.50 per transaction

+ Auctions

\$229/MO OR \$597/QTR Save \$90

✓ PROCESSING FEE:

- 3.95% (Qgiv + Merchant)
- \$0.30 per transaction
- Add 1% for American Express

✓ ECHECK FEE:

- 1.95% (Qgiv + Merchant)
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Just starting out?

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Questions?



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