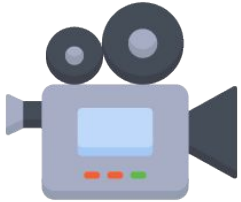
Data Tools to Improve Your Fundraising

Tiara Stephan, Product Marketing Coordinator, Qgiv by Bloomerang

December 10, 2024



+ 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

Tiara Stephan,
Product Marketing Coordinator

- With Qgiv by Bloomerang for 3 years!
- I love researching fundraising best practices and helping nonprofits level up their fundraising game.
- You can often find me at a concert, watching movies, playing trivia, or hanging out with my dog!

Meet the Speaker

Margie Worrell, Curriculum Manager

Margie Worrell is the Curriculum Manager at Bloomerang. She serves on the board of the Peace Learning Center in Indianapolis, and has worked extensively with nonprofits as both a staff member and a lead volunteer. Her passions include education, theatre, her two grown children and her two small dogs.

Unlock the Power of Data

Data Leads to Better Fundraising

1. Monitor performance of fundraising campaigns and events.

2. Make better fundraising decisions with strategies backed by data.

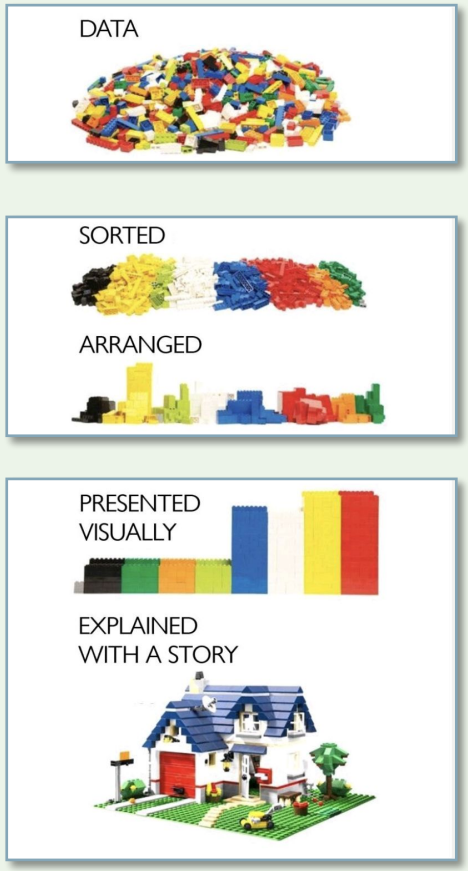
3. Improve relationships with your donors

Data Tells a Story

1. Data is full of untapped potential, but when left unorganized, it can feel overwhelming.

2. By organizing your data, you uncover patterns and insights that reveal donor behavior and preferences.

3. Data tells the story of your donor relationships, and how that shapes their engagement with your organization



What Are We Covering Today?

Tuesday, December 10

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

1. What data you need be looking at
2. How to use data to improve your fundraising
3. Tips to help you manage data
4. How Bloomerang + Qgiv can help you manage data

Our Journey

Building Our Data House

Visualize Potential: The Absence of Data

Without donor data, there is nothing. However, we have the proper programs in place (or land in this case!) to start collecting what we need!

In order for us to improve our campaigns and events, we need to implement a few things.

Lay the Foundation: Establish Data Systems

In order to use data, you need to have the proper tracking in place to collect and retain that information! Things your organization should be using to enhance your fundraising:

1. Fundraising software and a nonprofit CRM
2. Tracking platforms like Google Analytics and Facebook Pixel
3. Data policies and procedures

Make sure to collect donor information as well as transactional data!

Frame the Picture: Identify Important Data

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

1. Total amount raised from all sources (offline, online)
2. Total donations/registrations
3. Total donors/event attendees
4. New donors/recurring donors
5. New event attendees/returning event attendees
6. One-time vs. recurring donations
7. Donors preferred payment method

Organize Your Data

The next step in our story is to transform your raw data into a structured, easy-to-understand format.

1. Build dashboards and reports to view our performance holistically
2. Add comparisons to previous campaigns/events by time frame
3. Create form comparisons to compare one fundraiser to a similar fundraiser

Complete the Vision: Add Context

Context is the final piece of our puzzle. Our foundational data and our tools are very important but without context, our data doesn't tell us the full story and we can miss out on very important insights. Things to look at:

1. What appeals/invites did we send out?
2. Which channels did we send these?
3. What was our messaging?
4. Which audience did we target?

Analyze the performance of each!

Our Data Story

Manage data through a fundraising tool, a CRM, and data platforms.

Identify your most important data for each type of campaign/event.

Organize your data in an easy to view and understandable format.

Add context to complete your data story.

Deepen Your Donor Insights

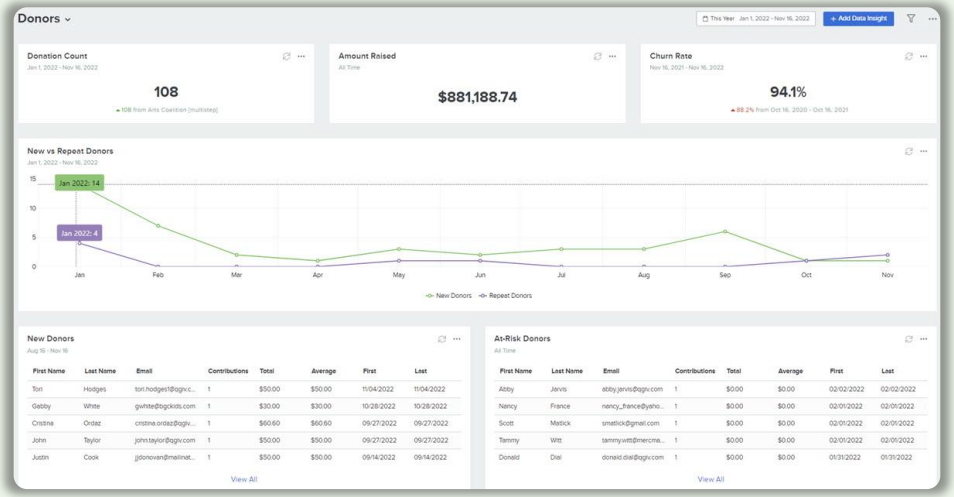
Elevate your organization's strategic approach by understanding key donor metrics. This will help your organization dive into your donor's giving patterns and help you build deeper donor relationships.

1. Supporter engagement
2. Generosity
3. Donor retention rate
4. Donor levels

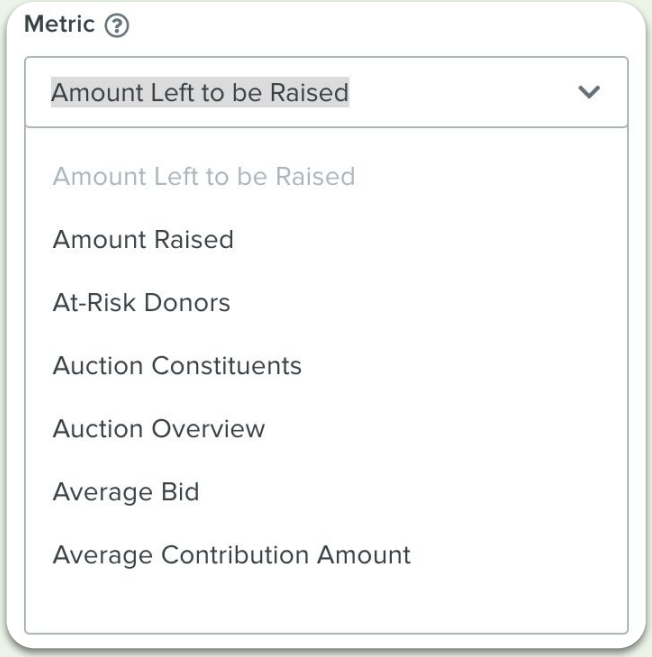
Qgiv by Bloomerang's Data Tools

Customizable Dashboards

1. Select from preconfigured dashboards
2. Create a dashboard from scratch from long list of data insights
3. Create and maintain dashboards for each user at your organization depending on role



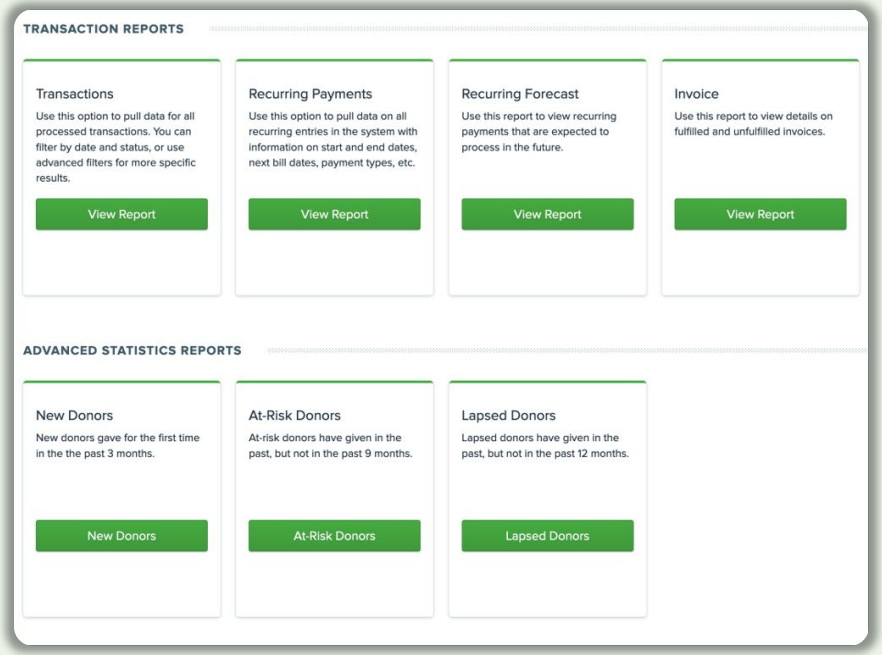
Data Insights



1. 40+ data insights to choose from
2. Display data in a way that makes the most sense for your organization
3. Add or remove insights based on what data is needed at that time

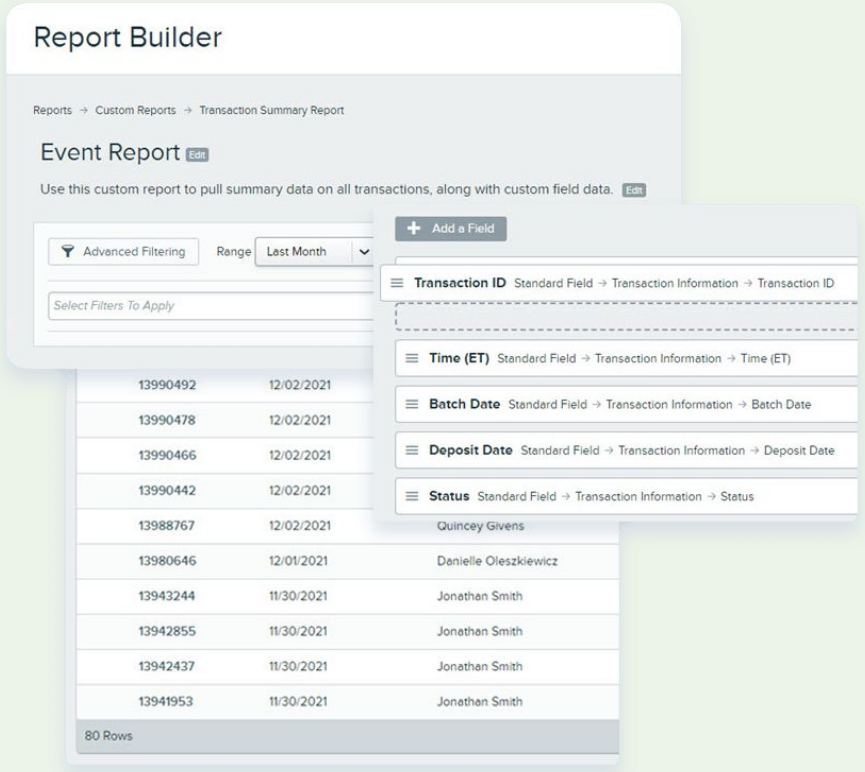
Pre-built Reports

1. Recurring donor reporting
2. Donation and event specific reporting (Peer-to-Peer/Auction)
3. Text giving (inbound and outbound)
4. Store and badge reporting for peer-to-peer



Custom Reports

1. Save complex filter sets as custom reports to save time later
2. Add, remove, and rearrange the default fields to make more sense for the data you're looking for
3. Add static fields to account for your unique needs with third-party applications
4. Change column headers
5. Build reports for specific job roles



Associated Info

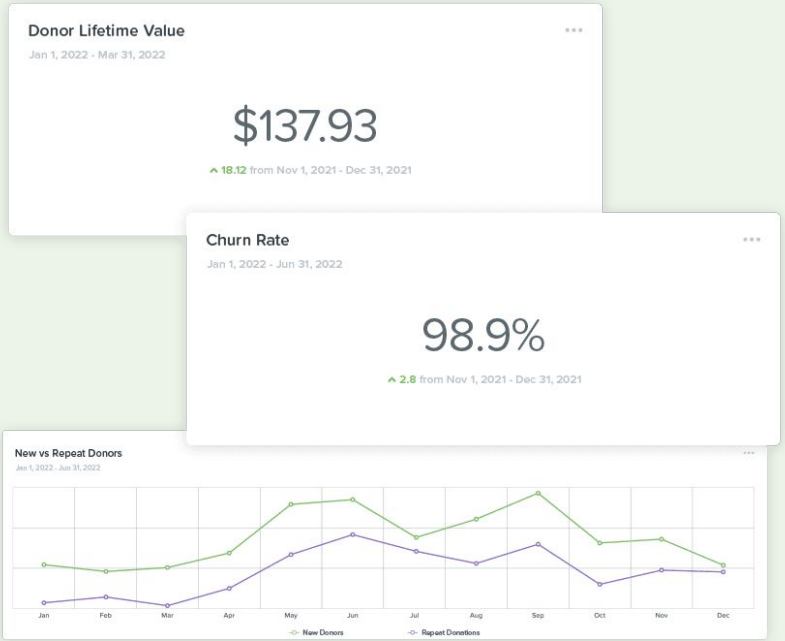
Easily add qualifiers to your Qgiv URLs to track donation sources on the fly.

It's as easy as:

1. Choosing a qualifier
2. Adding it to the end of the base URL
3. Using that URL in newsletters, on social media, in specific QR codes, etc.

	E	F	G	H	L
	First Name	Last Name	Suffix	Email	Associated Info
2	Jennifer	Mansfield		jennifer@qgiv.com	newsletteroct22

Advanced Donor Stats



Access to advanced statistics including:

1. At-risk donors
2. Churn rate
3. Donor lifetime value
4. Lapsed donors
5. New donors
6. Retention rate

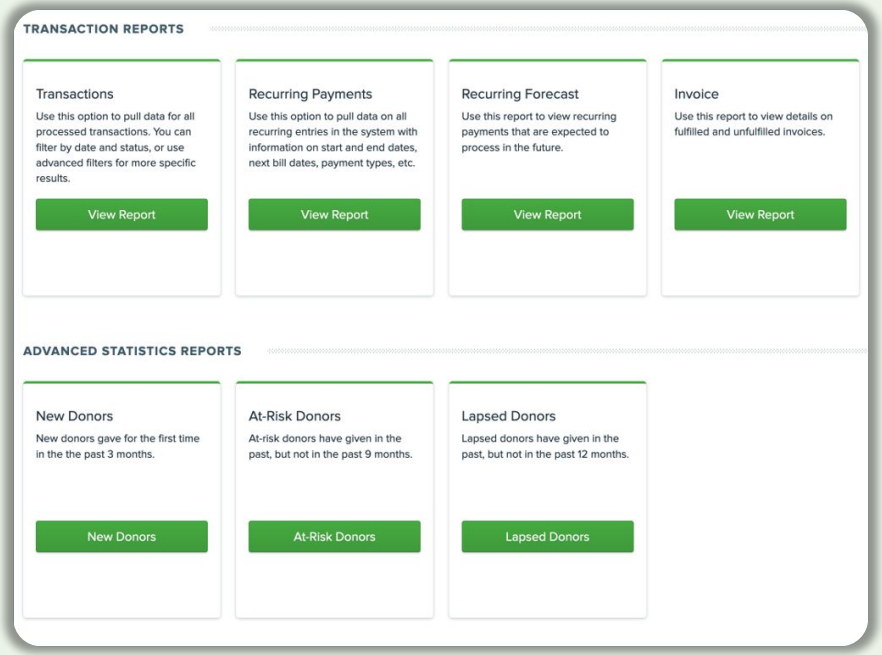
Ability to add these insights to your Qgiv dashboards

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:

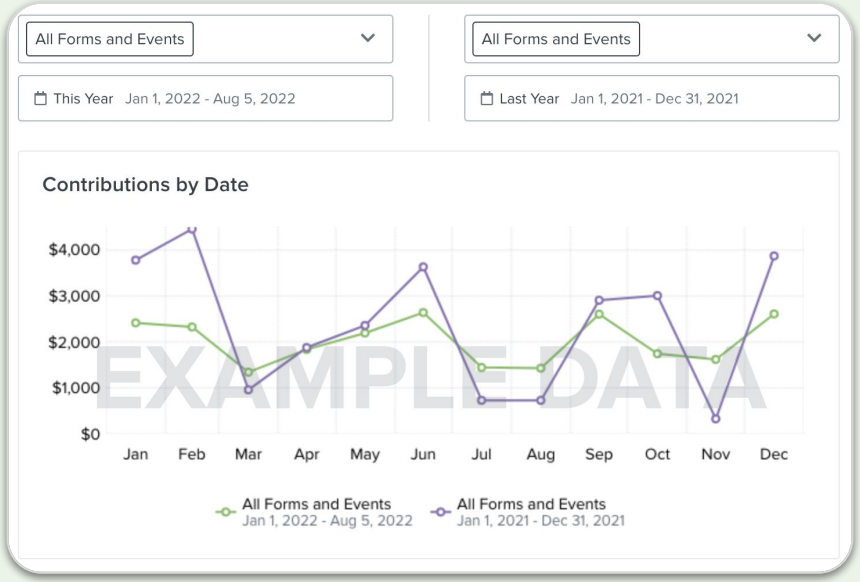
1. Need to take an in-person donation
2. Want to take gifts on-site at an event
3. Get a surprise donation from someone



Form Comparison Tool

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

1. Compare campaigns year-over-year
2. Compare performance of different forms
3. Run A/B tests
4. Learn what successful forms and events have in common



Integrations

Qgiv by bloomerang

CRMs

- bloomerang
- donorperfect
- Raiser's Edge
- Raiser's Edge NXT™
- virtuous

EMAIL

- Constant Contact
- Campaign Monitor
- mailchimp
- KLAVIYO
- emma

PAYMENT SOLUTIONS

- Apple Pay
- PayPal
- venmo
- echeck
- VISA, mastercard, AMERICAN EXPRESS, DISCOVER NETWORK

OTHER

- Google Analytics
- SSB | HEPdata
- zapier
- 360 MatchPro BY DOUBLE THE DONATION
- intuit quickbooks

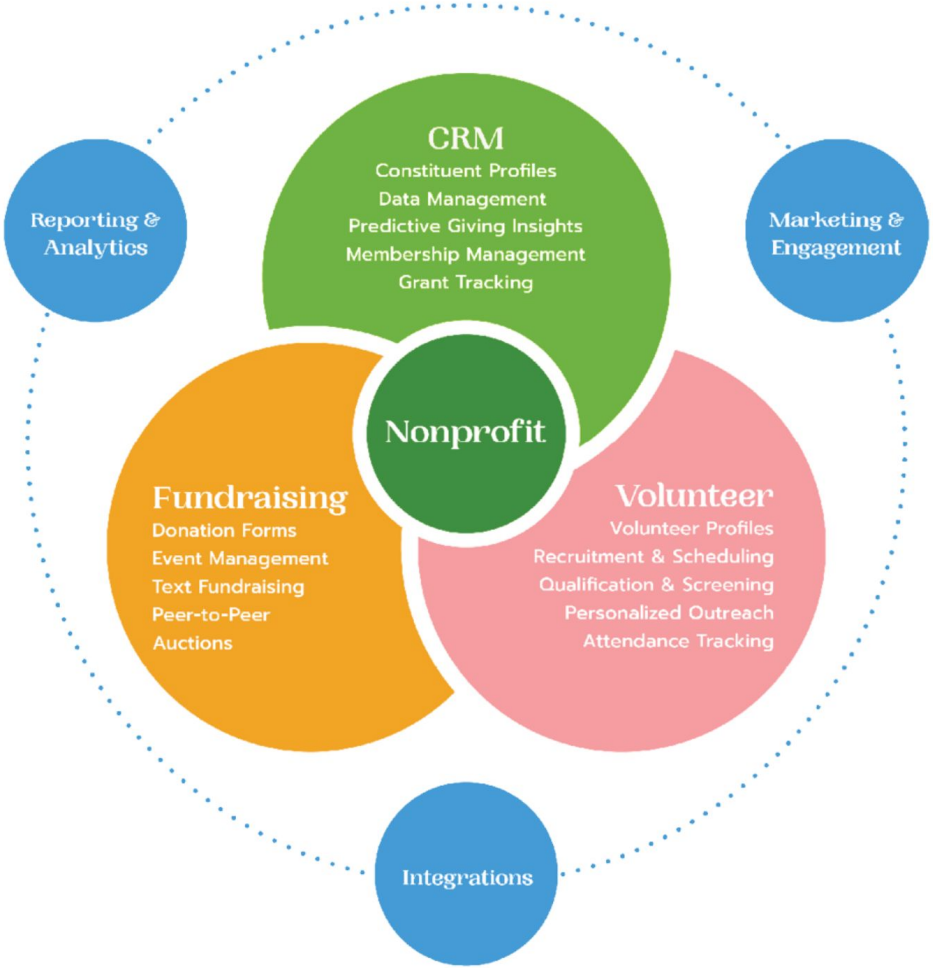
bloomerang + Qgiv

Bloomerang + Qgiv Integration

Seamlessly sync Qgiv fundraising data with Bloomerang so you can focus on acquiring new donors and cultivating long-term donor relationships.

+ Automate your data flow with hourly and daily sync options
+ Get set up quickly with robust, out-of-the-box field mappings
+ Customize your data sync for additional data control

Utilizing Your Data Management System



Just to level set how our tools fit together...

What is a Donor Database?

Other aliases:

- CRM [constituent relationship management]
- DMS [donor management system]
- RMS [relation management software]

[How to Choose the Right Donor Database: Ultimate Guide]

It is so much more than a data repository.

It can be like another team member!

House data important to your work in one platform

Qgiv by bloomerang

Improves accuracy and efficiency

Improves relationships with stakeholders and response

Improves decision making and understanding of your work

What to look for in a Donor Database

- Robust supporter profiles
- Easy segmentation of supporters
- Scalability

Nice to haves:

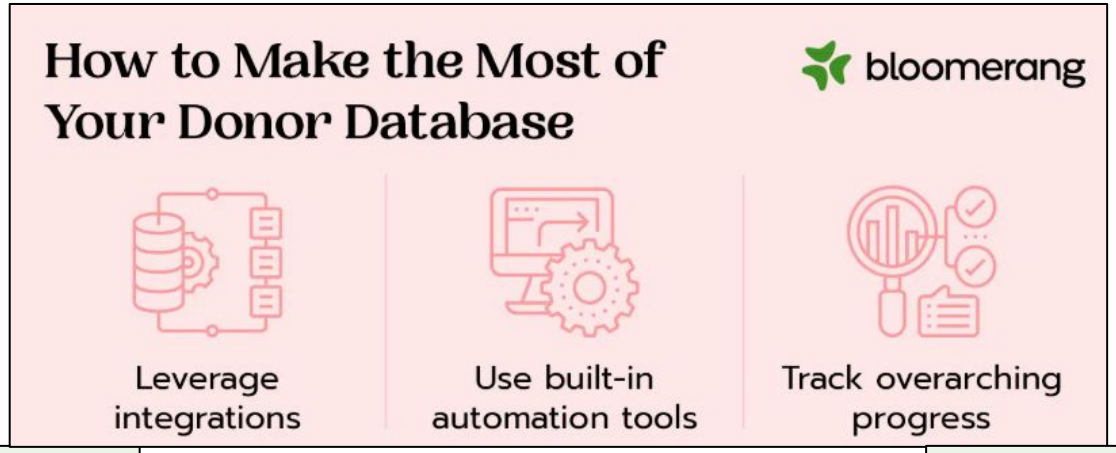
- Integrated giving potential insights
- An engagement meter to track affinity
- Built-in email marketing
- Goal progression easily accessible

But no two organizations are alike...

What are your needs? To help determine the unique list of features that will benefit your specific organization, follow these steps:

1. **Take inventory of your current software**.
    a. Are you currently taking full advantage of your existing investments?
    b. What features of your current software solutions do you like the most?
2. **Identify the functionality that is missing** from your current software strategy. What are your pain points?
3. **Decide what features will fill the holes in your current strategy**. Write them down and ask about them during demos.

How can you make the most of your Donor Database?



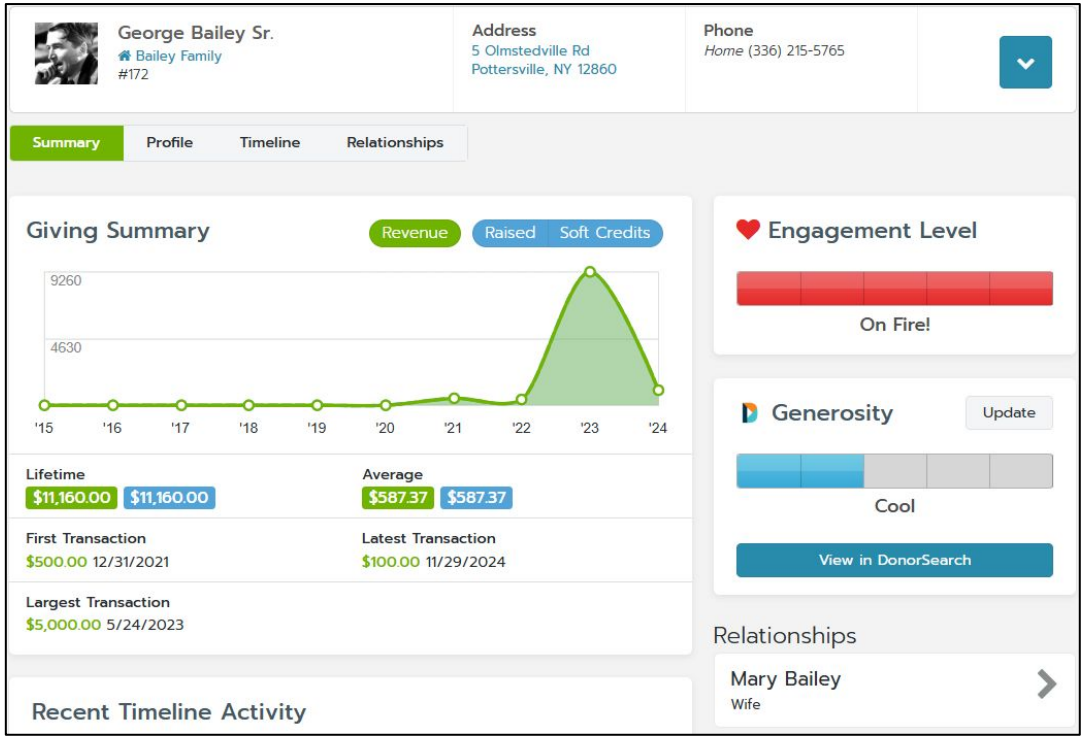
Seamless data flowing from tools into your CRM

Automation will save you time and money

Schedule and send reports and use your dashboard

Donor Relations

Robust supporter profiles

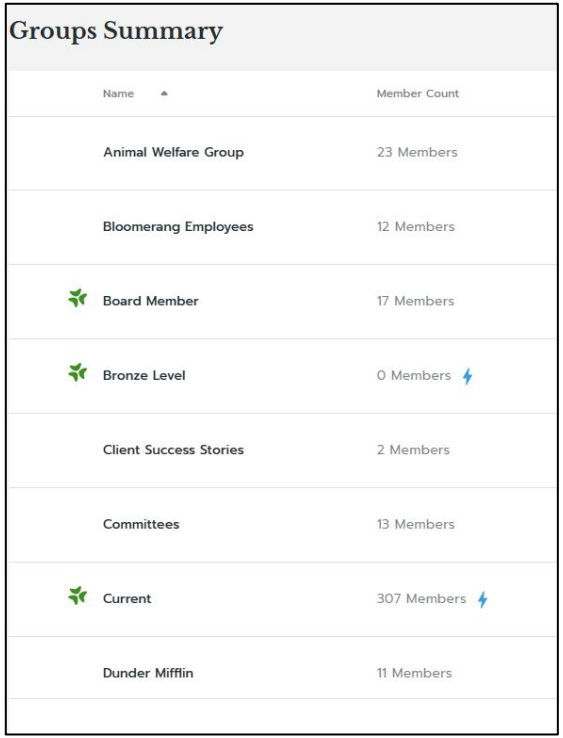


Use robust profiles to manage information about your supporters:

- Donation histories
- Volunteer hours
- Interactions
- Engagement levels
- Generosity score
- Relationships and Households
- Custom field data

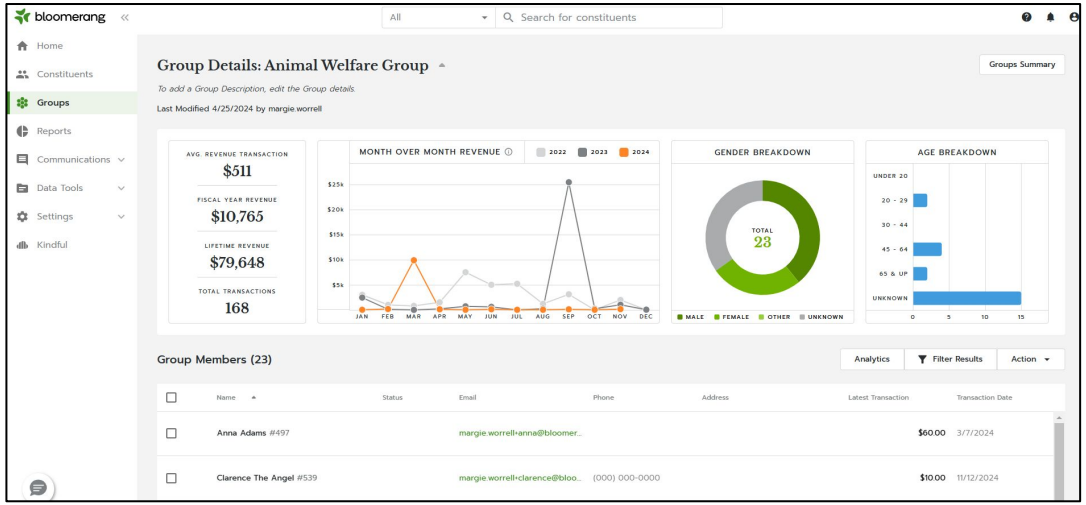
Leverage information in these profiles to build relationships with your supporters and encourage continued engagement.

Segmentation



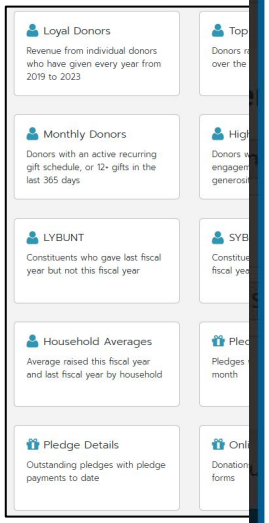
Using **Custom Fields** to gather data, you can then segment your donors by that data.

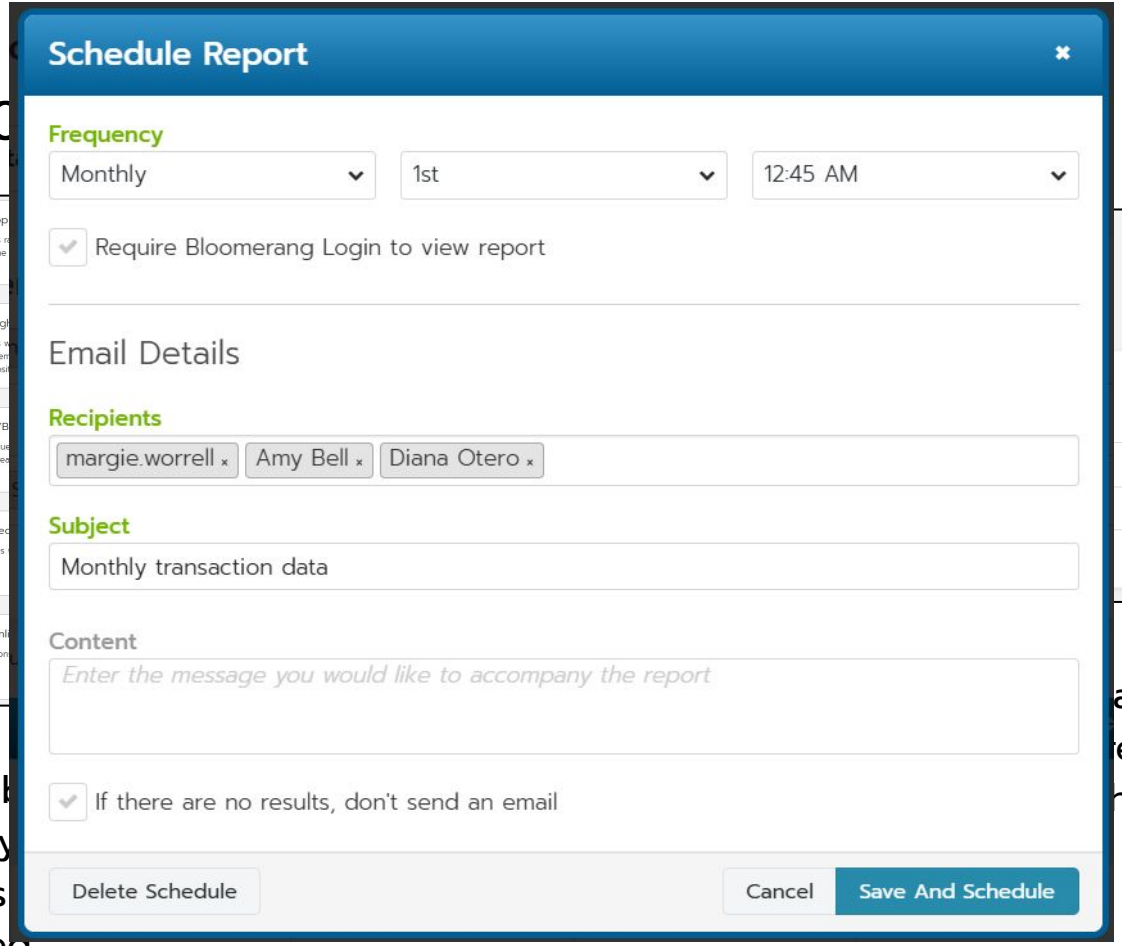
Groups allows you to easily create your most important segments. Your **Groups dashboard** allows you to see demographic and giving data for your group in an instant.

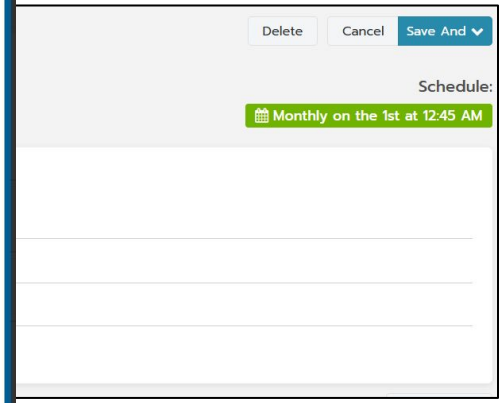


[Bloomerang's segmentation eBook]

Repo







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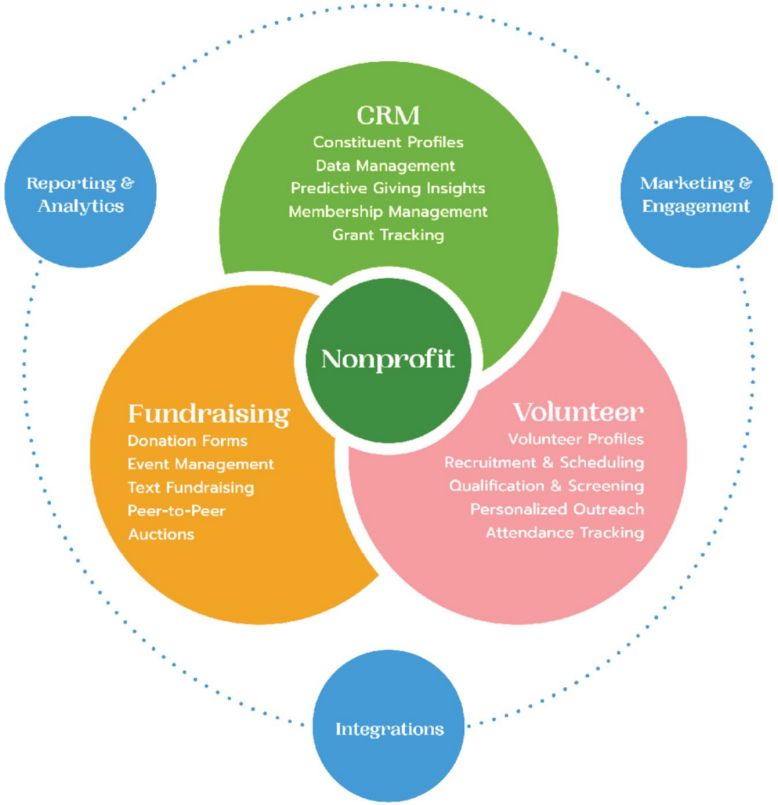
Scalability and Integrations



Native Integrations

Gmail AddEvent

Zapier Integrations

ripe Square

System Add-ons

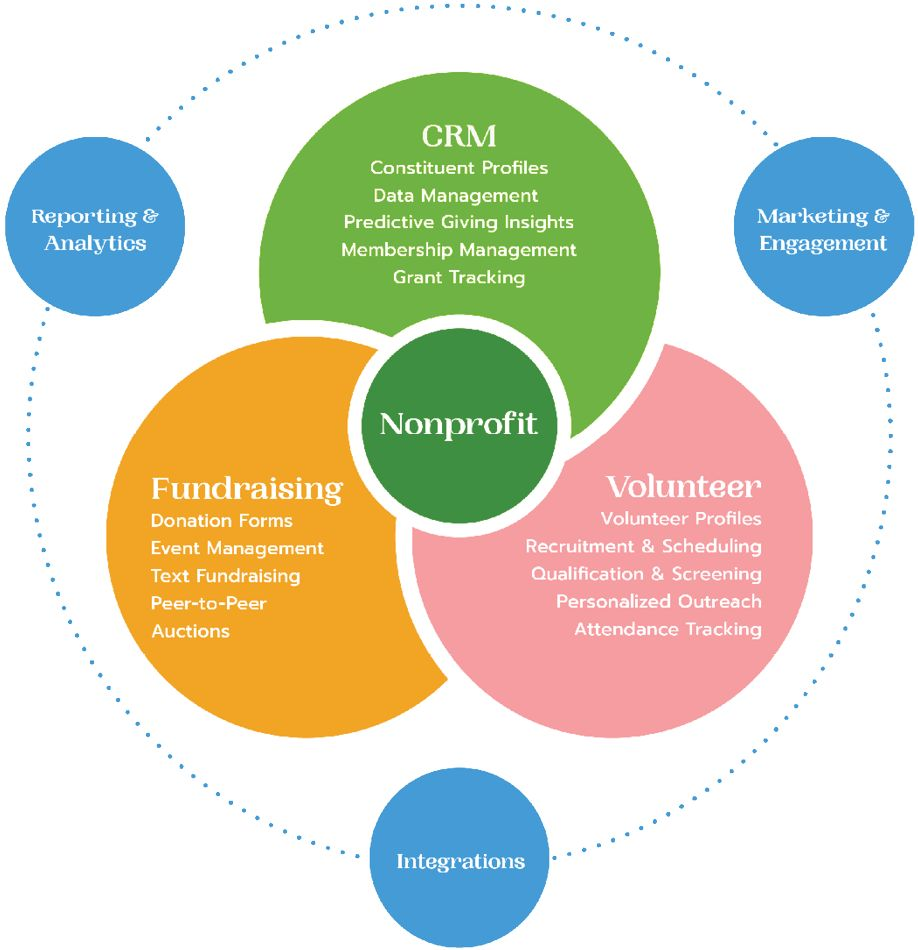
Google Sheets

GIVING PLATFORM

Connections that maximize impact

Bring together the best in donor management, fundraising, and volunteer management to:

+ Connect data, external tools, and teams
+ Insights that lead to better results
+ Automate & simplify your day-to-day
+ Attract new supporters
+ Increase fundraising revenue



Have Questions?

Qgiv by Bloomerang customers can email:
support@qgiv.com

Interested in using Qgiv or Bloomerang?
Request a demo through qgiv.com/demo-request

Have questions about best practices?
Visit qgiv.com/blog

Questions?