

SPECIAL FOCUS: DONOR MANAGEMENT SOFTWARE

Major Gifts Going Mobile As Software Catches Up

By MARK HRYWNA AND PATRICK SULLIVAN

The thought of major gift officers on the road with flash drives full of information that could easily be left on trains or elsewhere in their travels absolutely terrifies Richard Barber. Luckily, he doesn't have to worry about that anymore. "That's completely gone away. We can get up-to-date information to them," he said.

Barber, services manager for development and alumni relations at Loughborough University, just north of London in the U.K., recently equipped his six major gift officers with smart phones. The fundraisers now can access constituent data on the handheld devices rather than lugging around laptops or even binders.

"We've got gift officers who spend quite a lot of time on the road, meeting with donors and potential donors," said Barber. "It's that instant access to data. You can be at an event, look up a donor, and have that institutional knowledge about them," he said. "You can be a lot more reactive to what's going on rather than having to rely on who's there. They can do it there and then, not having to tie it to a laptop or wait until back in the office."

For Elliott Snuggs, vice president for operations at Asian Access in Los Angeles, Calif., a mobile app for donor management was an absolute must.

"Sometimes when you're small, you've got to be even more efficient. We need to have mobile connectivity to our donor management systems," said Snuggs. "When any of us are on the road, visiting a church, a donor or a foundation, we need to be able to connect to that information straight from our phone. That might not be the case for large organizations but there are a lot of us out there that are in this small category," he said.

At a large organization, there might be staff that prepare and compile information before fundraisers leave the office for a trip. "It's a little different when you're an organization our size; you've kind of got to do your own work," Snuggs said. If he's on his way to the airport and realizes he forgot to download the donor list for Nashville, Snuggs can still access the data when he lands and get information about other potential donors in the region. In addition to giving record and contact information, the app can map directions to the individual's address.

Asian Access and Loughborough University are among a handful of nonprofits that have been testing a mobile app for Blackbaud's Raiser's Edge for several months. The app will be generally available to Blackbaud's customers starting this month. In fact, several companies this year have released apps for donor man-

agement products.

Having the Internet in your pocket and accessible on a handheld device has not only changed how informal games of Trivial Pursuit are played, it's also changing the game for fundraisers. Donor management software is becoming just as mobile as anything else.

"We found that the experience on a phone's browser, while workable, just took too long," said Jon Biedermann, vice president of fundraising solutions for Horsham, Pa.-based SofterWare. "By having it as a true app, the process to look up a record and get contact information was decreased by about seven or eight times."

An app "just makes (our product) easier to use," said Orange Leap President Kent Hollrah. "Functionality like GPS tracking and mapping is more prevalent in an app-type solution. Your transfer rates are going to be faster." The Dallas, Texas software company offers an app version of its on-premise product Orange Leap MPX. In addition to GPS tracking, the app features click-to-call and constituent information.

Jake Wagner, a major gifts officer for the Time of Grace ministry in Milwaukee, Wisc., said he would be lost without his Android smart phone and DonorPerfect Mobile app – sometimes literally. He spends about 80 percent of

Special Focus, page 2

TOP DONOR MANAGEMENT PRODUCTS LIST ON PAGE 5

Continued from page 1

his time on the road and uses his donor management application for everything from making voice notes in donor files to getting directions to his next appointment, all while at the wheel.

“For my job, I need to be on the grid all the time,” said Wagner. “Lots of people need to see me on the weekends or after hours, and if they can’t get a hold of me, I’m not serving them well.”

Wagner has set up the app to remind him to email a donor every time one of the 250 donors he’s responsible for makes a gift, upgrades a gift, triples a gift, or makes a first-time gift of more than \$250.

“I can use (the app) to see where I am with a (donor) relationship, then I put a note in the app to call them back,” he said. “The number one thing (for a major gifts officer) is follow-through. Of-

tentimes, donors are giving to you because of the relationship you’ve built,” said Wagner.

There’s also a critical balance between convenience and security. Snuggs said he doesn’t mind having to log in each time to access the app. “That can be inconvenient at times but I think I want that inconvenience. If someone steals the phone, you don’t want them to have access to that data,” he said. “As soon as



Smaller and medium organizations use (mobile) the most.

--John Biedermann of SofterWare

you quit the app, it logs out.”

Blackbaud’s mobile app is for people who are on-the-go fundraisers, more likely major gift officers, though it can be for any fundraiser who needs to get to constituent information, said Dawn Hollowell, senior product marketing manager for Blackbaud, in Charleston, S.C. For someone who’s preparing for a series of visits to several people in one area, rather than lugging a laptop or binder, the app allows them access to their information on their smart phone.

“The moment you print it’s out of date. You never want to get someone in embarrassing situations, a donor who just gave a major gift yesterday and you don’t know. You have the ability to have constituent data at your fingertips,” she said.

At events, it’s also the immediacy of being able to input information into your records that’s appealing, rather than “writing it on a scrap of paper and waiting until you get back to the office,” Barber said. A tablet often can look more professional and not like a “second-class citizen,” he said, because sometimes people won’t expect the same level of service as a bank, for instance, because you’re a nonprofit.

Apps and the actual operating system are institutional memory, according to Jennifer Mercer, product manager at Blackbaud. “As much as you can leave behind for the next person to pick up, it makes the relationship with the organization feel more seamless,” she said.

Barber was fortunate that Loughborough was deciding whether to upgrade to Windows 7 almost a year ago when he got word that Blackbaud was developing an app for Raiser’s Edge. That’s when they decided to instead invest in Android smart phones for their major gifts officers, in anticipation of this summer’s beta release of the app.

“We were in a very, very lucky position,” he said. The app itself is free, but getting smart phones for their major gift officers was a significant commitment.

Special Focus, page 3

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Continued from page 2

He estimated it cost about £2,000 (roughly \$3,500) to equip Loughborough's six major gifts officers, and the development team has started to employ a tablet computer at events. "It's more of a team resource at events," he said.

Barber hopes in the longer term to work mobile and tablets into alumni relations, keeping recent graduates in contact and updated. "For me, one of the things will be, very much in the next six to 12 months, how our major gifts team uses it. Even in just a couple of weeks, I can see how this may change how we present our information and what we saw because it's more readily accessible. After a short while, we'll start to look again how we use it," he said.

"Once it's live, the more we use it, the more uses we'll find for it," said Barber.

Biedermann said the DonorPerfect app has about 450 weekly users, mostly major gifts officers and events coordinators who are often out of the office. "Sometimes you're someplace and you have a pitiful data connection," he said. That's less of a problem when using an app. "The bandwidth necessary to communicate between the app and our servers do not rely on web browser technology. It is a tiny footprint."

When it comes to mobile access to donor management software, the main determinate is often not the size or the resources of the organization, but the level of comfort of its employees. "It's less about the size of the database and more about the sophistication of the staff," said Stacy Dyer, product marketing manager of nonprofit solutions for Sage North America, in Austin, Texas. "We're finding organizations of all sizes interested in expanding mobile capabilities," she said. "We're seeing more and more younger, tech savvy employees clamoring for it."

The latest iteration of Sage Millennium will be optimized for mobile and customizable at the administration level so development officers will have access to the information they need while on the road. "Major gifts and development officers want to see as much data as possible, but some are particular about the kind of data they want to see," said Dyer.

"We're seeing a lot of young people who are coming into the nonprofit corridor," said Orange Leap's Hollrah, and they're expecting mobile access.

Dan Gillett, CEO of Kimbia in Austin, Texas, believes small and medium-sized organizations might get better use out of mobile technology than large nonprofits. "When you get to large organizations, there's a lot more complexity."

Biedermann agreed: "Smaller and medium organizations use (mobile) the most," he said. "Once you get large, you have less interaction. It's all about segments of donors, not individuals."

Hollrah said his clients using mobile run the gamut in terms of organization

and database size. Orange Leap serves many faith-based organizations, but beyond that its constituency for an app is "anybody who focuses on major donors," he said.

Though not all companies are making mobile-optimized software or apps, and not all organizations need such functionality, mobile is where everything -- and everyone -- seems to be headed. According to a 2011 report from the Pew

Research Center's Internet and American Life Project, more than one-third of American adults own a smart phone. And while the nonprofit sector as a whole sometimes finds itself behind the curve when it comes to technology, organizations have the opportunity to jump out ahead of the pack.

"The tools are available, but it takes a dedicated effort and you have to put in the time," said Gillett. "The people who

are really dedicated to those strategies can be very successful today."

Most nonprofits don't have a specific person dedicated for prospect research. It's often part of the fundraiser's job. The trend across Blackbaud's product line is working analytics into everything, said Hollowell. Instead of nonprofits having to dig through the data, it will surface in the product, she said, almost

Special Focus, page 4

The advertisement features a central logo for DonorDrive Social Fundraising by Global Cloud. Below the logo, the text reads "You still have a CHOICE for the BETTER FUNDRAISING SOFTWARE". A central paragraph states: "DonorDrive® is the non-profit industry's best choice for online fundraising and outreach software. It plays well with popular CRMs, is deeply social and works with any web-enabled device. Our focus is on you and your mission, which inspires our innovations each day." To the right, four circular icons illustrate key benefits: a circular arrow for "Switch without switching CRMs", a database icon for "Easily migrate existing data", a beaker with bubbles for "Always innovating better fundraising", and "99%" for "Customer happiness". At the bottom right, a blue curved banner contains the text "Learn more 866.244.0450 DonorDrive.com".

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Continued from page 3

like smart software.

Fundraisers need a quick snapshot so optimizing data delivery is a big part of the process. "Are we showing the right information for the market, big and small organizations? Across the board, we want to make the lowest barrier to entry as possible. We've done a lot of work not to require extra hardware and extra settings. Once you add hardware, you start to exclude smaller shops that are not as technical," said Mercer.

Donor management is not always about the five- or six-figure gifts. Many charities still use the tried and true channel of direct mail, which still takes time, printing and postage. "If you can identify a percentage of your database that's unlikely to give to you, you can focus on other areas where you can continue to inform about mission, cultivate those with capacity to give. That's money a nonprofit can spend to solicit new donations," said Hollowell.

The latest version of Blackbaud's Raiser's Edge (7.9.2, released in April) has Giving Score functionality. "It's really easy segmentation tool to use," said Hollowell, able to get a data score within two clicks. She related a story of the Hirshberg Foundation for Pancreatic Cancer Research. It was preparing to ask a major donor for a gift of \$50,000 but after computing a Giving Score and conducting another wealth screening, the foundation realized it could ask for -- and get -- a gift of \$250,000. "It's important once you know how much they can give. You can tailor those messages to the organizations, spend time with them, cultivate them," said Hollowell.

A 360-degree look of the donor allows nonprofits to know how close they are to the organization, and who the very best prospects are -- if they've volunteered, if they always participated in auctions, etc. "It's best to have that all in one space," said Hollowell. Identifying top prospects is great but it also helps to find those donors who you don't have to spend a lot of time on, the ones that you know volunteer for the organization and participate in events or auctions to benefit your charity, she said.

SOCIAL MEDIA INTEGRATION

It's no longer uncommon for nonprofits to have a social media presence, whether it's Facebook, Twitter, LinkedIn or all of the above. It's almost a requirement now.

"It is very interesting and we've talked about that sort of tracking, what's on a donor's Facebook page or Twitter account," said Rebecca Gelinas, senior manager of global donor database strategy at Operation Smile in Norfolk, Va. "It's nice to know, but how would we actually use that information? That's still to be determined. I think sometimes people get carried away with capturing the information, but the plan of how they use that information is lacking."

"Social media is a way to keep tabs on and connecting with donors," said Declan Murphy, marketing and social media coordinator for Mission Research in Lancaster, Pa. Mission Research this year added Facebook, Twitter and LinkedIn integration to its GiftWorks product.

"It's kind of like TweetDeck or HootSuite," he said, referring to the social media management platforms. "If you're in GiftWorks, right there you can see all of your news feeds. It's a neat little spot to get all your info and keep up to date with your donors."

The functionality allows development officers to see their donors' activity on social media platforms, and interact directly with them by posting messages to the Facebook walls or Twitter feeds. Murphy said users will



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--Dan Gillett of Kimbia

still have to friend and follow donors, but it's a matter of convenience.

"If it's not already part of their every day life, it'll fast become one," Patrick Dorsey, vice president of marketing at Avectra in McLean, Va., said about monitoring and management of social media. "It's so critical for these organizations to understand and have their finger on the pulse of important issues," he said.

"The ability to consolidate and create this dashboard to see all these channels is becoming critical," he said, to understand what their messaging can be and reach out to new supporters and donors. "It will become one of the most valuable dashboards for organizations" trying to respond to the tone and emotions of other conversations, said Dorsey.

Social media monitoring can make nonprofits able to engage in conversation, participate at selected times, and be better equipped to go for that ask. "The monitoring aspect will be able to consolidate all that information into one platform, into a CRM system, identifying donors and key influencers," said Dorsey.

Blackbaud's eTapestry partnered with Constant Contact to offer integration with the Constant Contact social campaign, which helps people reach out and engage through Facebook. "It's surfacing in all our products at some level," said Melanie Mathos, senior public relations manager at Blackbaud.

There are many technology partners that can leverage platforms to help build integration and use a customer's Facebook page as a way to drive people to a database. "A lot of that is just the next evolution of peer-to-peer marketing that's been very successful," said Dorsey.

"The amount of data now at your fingertips is overwhelming," said Dorsey. It is critical to have tools that will allow you to better measure donors and supporters on engagement -- to prioritize to whom you are reaching and the message. "Those type of tools that are really measuring, prioritizing, automating certain interactions, based on that level of scoring, that's the next wave because you almost need some assistance with all that data," he said.

"Everyone has a strong database and different strengths...but additional features like social media management and donor engagement scoring, that's what'll make the data actionable," said Dorsey. *NPT*

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