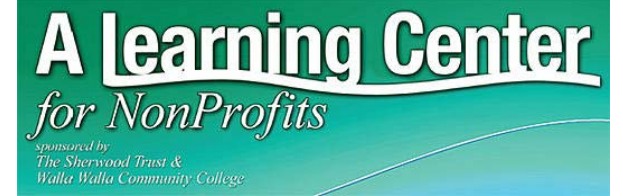


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The Importance of Donor Data

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Burning Questions

Why track Donor Data?

- Cultivation as Friendship
- Strategic Contact
- System for Hundreds or Thousands
- Moves Management
- Institutional Memory

Prospective Donors

- Come to Know You or Be Involved
- Donors of the Future

Types of Systems

- Out of the Box
- Configurable
- Custom-built

Types of Systems

- Installed
- Hosted

System Tracking Functions

- Donor information
- Gifts
- Pledges
- Events and Activities

System Contact Functions

- Mailing Labels
- Mail Merge
- General or Customized Letters
- Emailing

Contact Tracking

- Automatically
- By batch
- Individually - notes

Reconciliation

- Automatically, e.g. connect to QuickBooks
- Control vs. Convenience
- By batch

Ease of Use

- Queries
- Reports
- Customization

Track the Whole Picture

- Volunteers
- Events

Training

- Non-technical staff
- Guesswork, work-around, opt out