The Importance of Donor Data
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