Skype Chat Summary

Fundraising in CRM – 5/15/14

Attendees:

Becky Fulmer – Ohio State Unviersity

Reané Travis – UNC – Chapel Hill

Ivana Plesnivy – Simon Fraser University

Allen Roth – Jewish Federation of Cleveland

Mike Cicerone – Boston University

Barb Laane – Feeding America

Briana Wuagneux – Planned Parenthood Federation of America

Cindy Bond – University of Georgia

Yvonne Novick – Jewish Federation of Greater Philadelphia

Colin Treen – Planned Parenthood Federation of America

Mary Ann Wrana – Simon Fraser University

Sam Lufi – American Bible Society

Lyn Brit – Save the Children

Yvonne Mann – Texas Christian University

1. Ivana: How do others track how much money fundraisers are responsible for? Does anyone use the fundraiser credit on revenue or do they link revenue to opportunities?
   1. Barb: They link revenue back to opportunities
2. Mike: They’ve set up a number of fields to auto-populate with fundraiser’s names to make it easier for them (“owner” “assigned to”
3. Barb: Fundraisers find it frustrating that they have to go through a large number of clicks to get what they need.
   1. Reané, Becky, Mike, Cindy, and Sam all agree and get the same complaint from users
   2. Cindy – fundraisers want the const. lookup ID on all pages (interactions, etc.)
   3. Mary Ann – it’s easier than their previous system. They also give users 2-3 hours of training and followup to ensure that they know how to use it.
   4. Barb: They are considering creating a custom page with more information in one spot
      1. Mary Ann: They have a couple of custom pages for this information
      2. ACTION: Mary Ann to share images of their custom pages
   5. ACTION: Caroline to check to see if any discovery has been done or will be done around this issue.
4. Does anyone use queries to get more information to fundraisers?
   1. Barb: They’re considering it.
5. Sam: He’d like to see a suggested/ideal prospect management cycle
   1. Why is there a prospect status on the prospect AND plan level? Should those work together?
      1. Becky: They use prospect status to indicate the overarching status (Prospect, Stwardship, Suspect – for research leads) and plan stage to indicate where prospects are in a particular gift conversation.
      2. Reané: they use prospect status to display rating the research team has assigned to the prospect. Plan status is used to track progress on the plan itself, since they can have multiple plans being worked on at a time.
      3. Barb: They don’t use the overall prospect status, just the plan status. Sometimes they don’t have an overall prospect manager either.
      4. Mary Ann – they don’t use prospect status either
   2. How to record prospects who have been identified by research but need a qualification visit? Plans are cumbersome for that but interactions prevent reporting
      1. Mary Ann: They use an attribute called “Research Identified Prospect” which they can query on
         1. Sam – using an attribute takes it out of the workflow of contact reports though.
      2. Reané: If research team identifies a potential prospect, they create a 2-step qualification plan and assign it to a fundraiser.
      3. Becky: They have a status of “Future Suspect” – the research team manages these – queries on them and reviews them regularly to determine when they should be made an active suspect again.
      4. Barb: When they have a new prospect, they enter a pending interaction with a qualification status. Then, once the gift officer visits, they may or may not develop a plan.
         1. Could have an expected date on the interaction and then fill in actual #s and comments
         2. Based on the interaction, they may add a full plan.
         3. It’s not consistent right now
         4. Interaction information is available in query so that they could report on it.
   3. He’s not confident that they’re using CRM correctly
      1. ACTION: Caroline to look in to this to see what was discussed during implementation for American Bible Society - Done
      2. ACTION: Caroline to see if the Docs team could potentially put together a prospect life cycle as a summary
   4. Sam: It would be helpful if prospect status and ratings could be edited from contact report entry form
   5. Sam: The user guide doesn’t give much information on modeling scores/ratings and prospecting – it doesn’t talk about constructing those values or uploading your own.
      1. ACTION: Caroline to review Documentation and talk to Docs team about adding more information on this.

NOTE: Tanya Crowe, from UGA, did not attend the chat but wanted to contribute that they have also customized this area. They’ve created a custom data list on their Prospects and Plans tab to include more information for their fundraisers. See attached screenshots for more details.