[05/15/2014 2:00:33 PM] Caroline Barnes: Hi everyone! It's CRM Skype time!

[05/15/2014 2:00:38 PM] Caroline Barnes: Our topic today is Fundraising in CRM.

[05/15/2014 2:00:53 PM] Caroline Barnes: Let's go ahead and get started: If everyone can share your name, organization, and role?

[05/15/2014 2:01:21 PM] Caroline Barnes: Is anyone/everyone able to see my messages?

[05/15/2014 2:01:35 PM] Becky Fullmer: Becky Fullmer, The Ohio State University, Asst. Director of Prospect Management.

[05/15/2014 2:01:58 PM] Caroline Barnes: Hi Becky! Looks like some others can't see the group today. Bear with me for a moment :)

[05/15/2014 2:02:32 PM] Reane Travis: Reane Travis, UNC Chapel Hill, Training & Support

[05/15/2014 2:02:49 PM] Ivana Plesnivy: Ivana Plesnivy, Director Advancement Systems

[05/15/2014 2:03:05 PM] Allen Roth: Allen Roth - Jewish Federation of Cleveland, Director of Business Applications

[05/15/2014 2:03:29 PM] Caroline Barnes: I think Mike's here now too?

[05/15/2014 2:03:53 PM] Caroline Barnes: Just bear with me everyone, we're having some trouble with people being able to see the group.

[05/15/2014 2:03:59 PM] Mike Cicerone: Mike Cicerone - Boston University - Application Administrator

[05/15/2014 2:04:20 PM] Barbara Laane: Barb Laane, Technology Programs Manager, Feeding America here.

[05/15/2014 2:05:10 PM] Barbara Laane: @Caroline, I can see your messages. Thanks.

[05/15/2014 2:05:17 PM] Briana Wuagneux: Briana Wuagneux, Planned Parenthood Federation of America, Marketing Manager

[05/15/2014 2:05:30 PM] Cindy Bond: Cindy Bond, UGA

[05/15/2014 2:06:06 PM] Yvonne Novick: Yvonne Novick Jewish Federation of Greater Pgh

[05/15/2014 2:06:31 PM] Caroline Barnes: Ok everyone, let's go ahead and get rolling. Today we're talking about fundraising in CRM

[05/15/2014 2:06:39 PM] Caroline Barnes: Does anyone have any questions they'd like to start off with?

[05/15/2014 2:07:46 PM] Caroline Barnes: Some questions that were brought up in our kickoff session: do your fundraisers regularly use CRM? Do they find it easy/challenging to use? Do they use the mobilization options?

[05/15/2014 2:08:05 PM] Colin PPFA: Hi, Colin Treen, Planned Giving Analyst, Planned Parenthood Federation of America

[05/15/2014 2:08:56 PM] Mike Cicerone: I find the more fields that can be automatically populated instead of making fundraisers fill them in the better

[05/15/2014 2:09:36 PM] Caroline Barnes: oh yes! Everyone - when you're responding to specific people, make sure to use the "@" symbol so we know who you're talking to

[05/15/2014 2:09:37 PM] Ivana Plesnivy: Do any of you use the fundraiser credit on revenue or do you link the revenue record to the opportunity to track how much $ a fundraiser is responsible for?

[05/15/2014 2:09:53 PM] Caroline Barnes: @Mike - do you guys have ways of doing that now?

[05/15/2014 2:10:27 PM] Barbara Laane: @caroline, the fundraisers I have heard from believe that CRM is challenging to use in terms of the number of clicks to get to things. They are not using the mobilize feature as far as I know even though that was presented to them in 3.0.

[05/15/2014 2:11:19 PM | Edited 2:11:38 PM] Mike Cicerone: @caroline: we have a couple of "owner" or "assigned to" fields that are auto populated with the fundraisers name... or at least it was requested by the fundraisers

[05/15/2014 2:11:42 PM] Reane Travis: @caroline, I agree with @barbara.laane1 -- our fundraisers think everything takes too many clicks

[05/15/2014 2:12:02 PM] Becky Fullmer: Our fundraisers also find the number of clicks to get to things to be an issue, though we are trying to get them to use their fundraiser page to make navigation just a bit easier

[05/15/2014 2:12:04 PM] Mike Cicerone: @everyone: We have heard the number of clicks complaint also

[05/15/2014 2:12:31 PM] Cindy Bond: @everyone - same complaint at UGA too

[05/15/2014 2:13:01 PM] Cindy Bond: @everyone, plus the fundraisers want the constituent's lookup id to appear on every page in CRM (ex: interactions, etc)

[05/15/2014 2:13:18 PM] Mary Ann Wrana: @everyone - we haven't had any complaints about too many clicks. It is far easier to navigate compared to our previous system.

[05/15/2014 2:13:44 PM] Caroline Barnes: @mike @barb @cindy @reane - hm well that's definitely a common theme. have you guys ever had conversations with products about this?

[05/15/2014 2:13:53 PM] Caroline Barnes: @mary ann - well that's good to hear!

[05/15/2014 2:14:20 PM] Barbara Laane: @ivana, I believe our group here links the revenue back to the opportunity; although I don't believe it is consistently being done that way.

[05/15/2014 2:14:22 PM] Mike Cicerone: @caroline: i dont htink wev e said anything to products.

[05/15/2014 2:14:35 PM] Caroline Barnes: @mike/barb/cindy/reane - I wonder if there has been any discovery around this or if there is any planned - I can look in to that, just curious if you guys know of any already

[05/15/2014 2:14:51 PM] Ivana Plesnivy: What customizations have you made to this part of the system?

[05/15/2014 2:15:12 PM] Barbara Laane: @Caroline, the too many clicks was definitely brought up to sales team along with support.

[05/15/2014 2:15:28 PM | Edited 2:15:37 PM] Mike Cicerone: @caroline: i havent heard of any discovery about the too many clicks

[05/15/2014 2:16:00 PM] Reane Travis: @caroline, I'm not sure if there has been discovery around that or not. other folks on our team are in those sessions. there are so many meetings I know I don't hear about all of them. :)

[05/15/2014 2:16:05 PM] Caroline Barnes: @barb - any sense of when that was discussed for you guys?

[05/15/2014 2:16:30 PM] Caroline Barnes: @reane - I'm actually working with products to organize and publish a schedule of ALL discovery sessions so everyone knows about them and can sign up as needed.

[05/15/2014 2:18:11 PM] Barbara Laane: @Caroline, we are woirking with a team from Supply chain and bringing them on board and working to convert their act data into CRM. We are looking to explore either a query on their desktops to make it easier to get to their data or else add a custom design page. I believe we would need to explore some kind of page designer custom pages to add additional fields onto the page, so they can see more of the data in one spot. But of course, they won't be able to see all of it.

[05/15/2014 2:19:51 PM] Mary Ann Wrana: @Caroline and Barbara - our report writer has designed a couple of custom pages that allow fundraisers to see key fundraising metrics.

[05/15/2014 2:20:19 PM] Barbara Laane: @Caroline, I believe the outcome of the too many clicks was partly training but also the need to develop some special pages.

[05/15/2014 2:20:47 PM] Barbara Laane: @ma, if you have some time to share that info, that would be great.

[05/15/2014 2:20:48 PM] Caroline Barnes: @mary ann/barb - so this kind of answers ivana's question about whether people are customizing this area

[05/15/2014 2:21:39 PM] Caroline Barnes: @mary ann - I believe that you can share image files in the session if you'd be interested in showing everyone what the pages you've done look like :)

[05/15/2014 2:21:53 PM] Barbara Laane: @aroline, @Ivana, we haven't done customizing here as we would like to keep the product as vanilla as possible; but we are seeing that it is a definite need we are going to need to explore.

[05/15/2014 2:21:57 PM] Mary Ann Wrana: @barb yes, I can share if chocolate is sent.

[05/15/2014 2:22:29 PM] Barbara Laane: @ma, tell me where to send the chocolate, and I'd be happy to.

[05/15/2014 2:23:23 PM] Mary Ann Wrana: @barb Alright! Will send scren shot of our prospect list page that provides info in slightly different way than pending step and prospect and plan pages . . .

[05/15/2014 2:23:44 PM] Caroline Barnes: @mary ann - thank you for sharing!

[05/15/2014 2:24:38 PM] Becky Fullmer: @ma would love to see that too! We have many comments from fundraisers about other things they'd like to see on the plans/ prospect list page (for example, the expected ask date)

[05/15/2014 2:25:09 PM] Mary Ann Wrana: @everyone - what about queries. Is anyone using to generate easier to use info for fundraisers (so they don't have to click so much)?

[05/15/2014 2:25:37 PM] Cindy Bond: @maryann - i'd love to see it too please

[05/15/2014 2:25:43 PM] Mary Ann Wrana: @becky - sure, will send to you too.

[05/15/2014 2:25:48 PM] Samuel Lufi: @everyone - sorry to be late, but as someone who carries a portfolio of donors, I agree with all of our MGO - too cumbersome as a whole

[05/15/2014 2:26:03 PM] Mary Ann Wrana: @cindy - K. will share with you too.

[05/15/2014 2:26:13 PM] Cindy Bond: @maryann - thank you :)

[05/15/2014 2:26:23 PM] Barbara Laane: @ma,we are looking to do queries as well to make the information more readily accessible. That is one of our potential approcaches for the Supply Chain team.

[05/15/2014 2:27:18 PM] Caroline Barnes: @sam - hi! I'm gonna chat with PD to see if they've heard this before (I have to imagine they have since everyone here feels that way) and see if there are plans for progress

[05/15/2014 2:28:41 PM] Becky Fullmer: @barb -- I think only our power users actually design queries, though info is pulled into Excel all the time and sent to fundraisers. Are you talking about a way that fundraisers or other general users can access/use queries within TAS? Sorry if this is a rookie question :)

[05/15/2014 2:29:07 PM] Samuel Lufi: @Caroline - I would also love to see an ideal prospect management cycle from PD. Why is there a prospect status on the prospect and at the plan level? Is there a vision for them to work together? What is the best way to record prospects who have been identified by research but need to have a qualification visit? Plans are cumbersome for that, but interactions circumvent other aspects of reporting..

[05/15/2014 2:29:31 PM] Mary Ann Wrana: @everybody Our fundraisers find CRM very intiuative but they go thru two to three hours of training + followup to make sure they are able to navigate around and know what they should be adding to their prospect plans, etc.

[05/15/2014 2:29:39 PM] Barbara Laane: @Becky, we were looking to just develop a simply query that we would then put on the user's home page if possible if page designer becomes to complicated.

[05/15/2014 2:29:54 PM] Samuel Lufi: @ma - do you have documents on that training that you could share?

[05/15/2014 2:30:29 PM] Samuel Lufi: @ma - I think implementation could be at play as well. I'm not convinced we are using the product as it is designed - so instead of it working for us, we are working against it

[05/15/2014 2:30:31 PM] Mary Ann Wrana: @samuel - we use an attribute called 'Research Identified Prospect' to allow us to query on

[05/15/2014 2:30:37 PM] Caroline Barnes: @sam - I have that written down from you when you mentioned it to me before! I am actually working with our docs team on an overhaul of our user guides so I wonder if they could do a "life cycle" sort of summary there as an additional bit of help. i'll ask them.

[05/15/2014 2:30:40 PM] Becky Fullmer: @sam we use the prospect status to indicate the overarching status (Prospect, Stewardship, or Suspect, which is the identifier we use for research leads), and then the plan stage to indicate where prospects are in a particular gift conversation, if that makes sense. So they do work together they way we use them.

[05/15/2014 2:30:52 PM] Samuel Lufi: @carolyn - thanks!

[05/15/2014 2:31:00 PM] Becky Fullmer: @barb thanks! Will have to investigate that!

[05/15/2014 2:31:25 PM] Samuel Lufi: @becky - how do you indicate if someone is not a prospect now, but might be in the future?

[05/15/2014 2:31:51 PM] Mary Ann Wrana: @samuel - I'm not sure there is enough chocolate for this one. Our training docs contain too much confidential info. I'll check into and let you know if I could provide a summary.

[05/15/2014 2:32:10 PM] Reane Travis: @samuel.lufi we use the prospect status to display the rating the research team has assigned to the prospect. the plan status is used to track progress on the plan itself since we can have more than one plan being worked on a prospect at a time. if our research team identifies a potential prospect, they create a 2 step qualification plan and assign it to a fundraiser.

[05/15/2014 2:32:23 PM] Becky Fullmer: @sam one of the statuses we have is Future Suspect. Research takes the lead on managing these -- querying them and reviewing them on a regular schedule to determine when they should be brought back on as an active suspect.

[05/15/2014 2:32:37 PM] Mary Ann Wrana: @samuel - you could use a custom attribute to tag the record and that makes it easier to query.

[05/15/2014 2:32:43 PM] Samuel Lufi: @ma - that makes sense. Still, training that makes gift officers happy would be gold

[05/15/2014 2:33:49 PM] Samuel Lufi: @ma - that takes it out of the work flow of contact reports, though (using a custom attribute). Ideally, the MGO should be able to make an indication on the contact report that would feed/populate the appropriate information

[05/15/2014 2:34:19 PM] Samuel Lufi: @becky - thanks.

[05/15/2014 2:34:40 PM] Becky Fullmer: @caroline, if we need to leave the discussion early, are we able to see the discussion history? I am new to skype chatting!

[05/15/2014 2:34:46 PM] Samuel Lufi: @reane - thanks. using a qualification plan lets it sit as its own category when reviewing the caseload - so I think that is nice.

[05/15/2014 2:35:17 PM] Samuel Lufi: @becky - you should be able to the history even if you never even logged in during the chat!

[05/15/2014 2:35:59 PM] Caroline Barnes: @becky - yes, you'll be able to come back in at any time and view the whole thing.

[05/15/2014 2:36:19 PM] Caroline Barnes: @becky - I also send a transcript and summary of the session to everyone who's ever been part of the group.

[05/15/2014 2:36:33 PM] Becky Fullmer: @caroline perfect -- thank you!

[05/15/2014 2:37:28 PM] Mary Ann Wrana: @sam we're using the attribute really as a way to keep track of potential prospects. We (Andrew Boden, Prospect Research Manager) see what you mean about the status and contact report but we're not sure how that could be accomplished from a systems side.

[05/15/2014 2:37:36 PM] Caroline Barnes: @becky - thanks for joining :)

[05/15/2014 2:38:53 PM] Samuel Lufi: @mary - it is so obvious, it seems weird that it isn't built into the CRM functionalities. Since I wasn't here during our implementation and we don't have good documentation, I keep wondering what is our internal issue and what are shortcomings in CRM itself

[05/15/2014 2:40:25 PM] Mary Ann Wrana: @sam - we're pretty new to CRM and it is hard to tell when something just doesn't work the way we're used to or if it is us not using the product right.

[05/15/2014 2:40:33 PM] Caroline Barnes: @sam - sounds like maybe we need to circle back to your implementation team and possibly ideabank if something is missing. I can help with that after the session. Usually during implementation my understanding is that documentation is created that defines processes, etc. for your organization

[05/15/2014 2:40:54 PM] Caroline Barnes: @mary ann - support is always around to help with questions like that. it is an interesting challenge though.

[05/15/2014 2:41:33 PM] Mary Ann Wrana: @Caroline - yes, support is always helpful

[05/15/2014 2:42:13 PM] Samuel Lufi: @caroline @mary - it would fantastic if prospect status and ratings could be edited from the contact report entry form - or a modification suggested that then went through a workflow for approval by a research team.

[05/15/2014 2:42:41 PM] Mary Ann Wrana: @sam and caroline - good idea sam

[05/15/2014 2:42:56 PM] Caroline Barnes: @sam - I'm honestly not terribly familiar with the ratings, but I can check it out and we can get it into the ideabank if necessary.

[05/15/2014 2:44:23 PM] Samuel Lufi: @caroline - neither am I! :) in more seriousness, it would be helpful to have more information on modeling scores and ratings and prospecting side of things. I've read the user manual several times - it doesn't really get at constructing those values or uploading your own (which is, on some level, because you guys want us to buy them from Target Analytics)

[05/15/2014 2:45:39 PM] Samuel Lufi: @caroline (not meaning to beat a dead horse - I realize that much of this is subsumed under previous conversations)

[05/15/2014 2:45:49 PM] Barbara Laane: @everyone. From looking at a bit of our data, it doesn't look like we use prospect status as an overall for the prospect; but just use status on the steps on the plans.

[05/15/2014 2:45:52 PM] Caroline Barnes: @sam - sounds about right. but we are still working on enhanching all of the user guides to be more descriptive and helpful. I'll take a look at it and chat with our docs team. I may get back in touch with you about specific areas of the guide

[05/15/2014 2:46:11 PM] Mary Ann Wrana: Thanks from SFU! Must go . . . will send screen shots, etc

[05/15/2014 2:46:59 PM] Caroline Barnes: @mary ann - thanks! let me know if I can help share things with the group.

[05/15/2014 2:47:00 PM] Samuel Lufi: @barbara - that is what we do as well

[05/15/2014 2:47:33 PM] Mary Ann Wrana: @Caroline - yes, I will make sure nothing confidential and will share

[05/15/2014 2:47:44 PM] Samuel Lufi: @barbara - do oyu create a plan with no plan manager?

[05/15/2014 2:47:53 PM] Samuel Lufi: @Mary ann - thanks!

[05/15/2014 2:48:00 PM] Caroline Barnes: @barb @sam - it may be that both options are there just to allow organizations with different business practices to use their preference.

[05/15/2014 2:49:11 PM] Barbara Laane: Sam, it depends if we add a plan manager or not. By Plan manager,you mean prospect manager, right? In a lot of cases, where there is a primary manager, the answer is yes. But if there are a lot of people managing the account but not one primary manager, then the answer is no.

[05/15/2014 2:49:21 PM] Mary Ann Wrana: @ Sam - You're welcome and thank you too. We are like Barbara and weren't using status on the prospect either but will now look into it.

[05/15/2014 2:50:06 PM] Samuel Lufi: @barbara - I guess I'm wondering how you would use the step status to reflect someone who needs a discovery visit without crowding a particular gift officer's work flows

[05/15/2014 2:52:31 PM] Barbara Laane: @Sam, good question. I believe a lot of the gift officers are using that as a part of the step process. But I know you could also record interactions here.

[05/15/2014 2:53:56 PM] Barbara Laane: @Sam, in fact I'm seeing a lot of data entered by Gift Officers here where they have recorded the interactiion.

[05/15/2014 2:54:44 PM] Samuel Lufi: @barbara - so when you have a new prospect, you enter a pending interaction with a qualification status? Then, once the gift officer visits, they may or may not develop a plan?

[05/15/2014 2:55:51 PM] Barbara Laane: @Sam. You could definitely do it that way. You have an expected date on the interaction and then you could fill in the actuals and comments when they happen.

[05/15/2014 2:56:27 PM] Barbara Laane: @Sam, and then based on that interaction, you may decide the need for doing a full plan with the prospect.

[05/15/2014 2:56:46 PM] Samuel Lufi: @barbara - but that is not the way you guys currently do it?

[05/15/2014 2:57:30 PM] Barbara Laane: @Sam, there is not a consistency in how different gift officers do things here. The ones that use CRM a lot tend to do the interactions and then do the plans.

[05/15/2014 2:58:32 PM] Samuel Lufi: @barbara - so that makes reporting hard, I suppose. :)

[05/15/2014 2:58:45 PM] Caroline Barnes: hey everyone - we're getting short on time - does anyone have any last minute questions before we wrap up?

[05/15/2014 2:59:13 PM] Barbara Laane: @sam, the interaction fields are available in query. So you should be able to report on it.

[05/15/2014 2:59:32 PM] Barbara Laane: @Caroline, I don't have any last minute questions. Thanks so much for hosting this chat!

[05/15/2014 2:59:36 PM] Samuel Lufi: @caroline - none here. thanks!

[05/15/2014 2:59:45 PM] Caroline Barnes: @barb @sam - thank you both :)

[05/15/2014 2:59:47 PM] Samuel Lufi: @barbara - thanks for your ideas and advice

[05/15/2014 3:00:11 PM] Caroline Barnes: @all - next week, we'll be talking about user training! looking forward to seeing you all here again and chatting

[05/15/2014 3:00:16 PM] Barbara Laane: @Samuel, it was my pleasure.

[05/15/2014 3:00:21 PM] Samuel Lufi: @bye!

[05/15/2014 3:00:30 PM] Barbara Laane: @Caroline. I can wait to talk about training. That's a great topic.

[05/15/2014 3:00:39 PM] Barbara Laane: @Everyone, have a great rest of day!

[05/15/2014 3:00:47 PM] Caroline Barnes: @barb - it'll be good! i'm curious to hear what everyone has in place.

[05/15/2014 3:01:00 PM] Cindy Bond: @caroline, now you're talking my language :)

[05/15/2014 3:01:27 PM] Caroline Barnes: @cindy - you're a pro at it. i still have on my mental checklist to see if i can check out one of your classes!

[05/15/2014 3:01:53 PM] Cindy Bond: @caroline - anytime :)

[05/15/2014 3:02:02 PM] Caroline Barnes: @cindy - thank you :)

[05/15/2014 3:02:08 PM] Caroline Barnes: y'all have a good afternoon!!!

[05/15/2014 3:02:15 PM] Cindy Bond: bye for now