Customize your CRM

How to use personal data to optimize donor touchpoints.

Your fundraising outreach is only as good as the data you collect. Establishing routines to keep your donor CRM updated and outlining ongoing touchpoints from that data throughout the year can take your fundraising to the next level. Here are our tips.

4 ways your CRM can improve fundraising

1. Story collecting. The more you talk with your donors, the more you learn about them. Note their stories and experiences in your CRM so everyone with access has the back story for reference. Keep these talking points top-of-mind.

2. Acknolwledgement of gifts. Most CRMs will link automatically to your online donation pages. Thank-you letters, cards, emails and acknowledgements can then be triggered automatically based on gift type and method received.

3. Analyzing prospects. Add custom fields or pull reports that outline specific actions (or inactions) of your donors in order to create follow-up procedures. Use this information regularly to build your relationships with donors.

4. Team segmenting. Divvy up tasks and communication between team members. Set weekly meetings or check-ins to share which donors have been contacted the week prior, looming prospects or general information by pulling CRM reports.

Tags and notes features

These CRM features enable your team to get a full picture of each donor in your database. Notes and tags tell the story of previous touchpoints and provide historical data on who your donors are. Encourage your team to use the notes area to track any personal contact or communication with a donor. Create a tagging process for easy segmenting and outreach. Tags can include any important characteristic for your organization; some ideas:

past board member	current board member	gala attendee	webinar attendee	major donor
alumnus	former staff	scholarship donor	legacy prospect	sponsor

CRM reports for personal fundraising outreach

Think strategically about reports that you can run from your CRM to personalize fundraising asks or create niche touchpoints throughout the year. Here are 10 examples to get you started.

Anniversaries + birthdays. Pull monthly reports and send birthday cards to donors.

Board members. Both past and present. Schedule monthly communications.

Email open rates. Reach out to those that open emails regularly (and those that don't).

Event volunteers. Use tags to create prospect lists for volunteer engagement.

Favorites. Know their favorite color? Favorite show? Send fun notes based on those facts.

Geographic location. Use contact info to segment by city, state, region or country.

Job title. CEO, CFO or CMO? Connect wtih specific donor types for matching gifts.

Lapsed donors. Gave in years past but not this year? Reconnect and find out why.

Monthly donors. Think of ways to engage your monthly donors with email and snail mail.

Significant donation amounts. Group propsects by past donation amounts.

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