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Cleaner Data for Better Results:

How to Maintain a Healthy Nonprofit CRM

Hello!

I'm David,

Business Development Representative.

I'm here to help you maintain a healthy nonprofit CRM for better fundraising results.

Your Executive Director is probably looking at your data from a completely different vantage point than your Development Director or volunteers.

Data cleanup is a constructive process that promotes cohesion within your nonprofit team and its fundraising efforts.

Why now

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- You have to start sometime
- Year end entry and reporting
- Receipting
- 2025 planning

How clean data brings better results

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Before cleanup

Issuing corrections, reversing payments, alienating donors

- Omission
- Duplication
- Transcription errors

Solution

Establishing proper data procedures

- Donor details
- Gift entry
- Gift follow-up
- Points of contact
- Maintenance

End result

Clean data for better fundraising results

- Effortless maintenance
- Seamless training
- Accurate reporting

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Imagine this scenario:

You host a gala where you encourage attendees to fill out pledge cards. Not all pledge cards are filled out the same. Some donors committed to pay their pledge monthly, with no end date specified, while others were specific about their payment schedule. Some wrote a check for the first month to show they would make good on their commitment, vowing to pay the rest electronically.

Will every team member enter this data the same way?

The Strategist

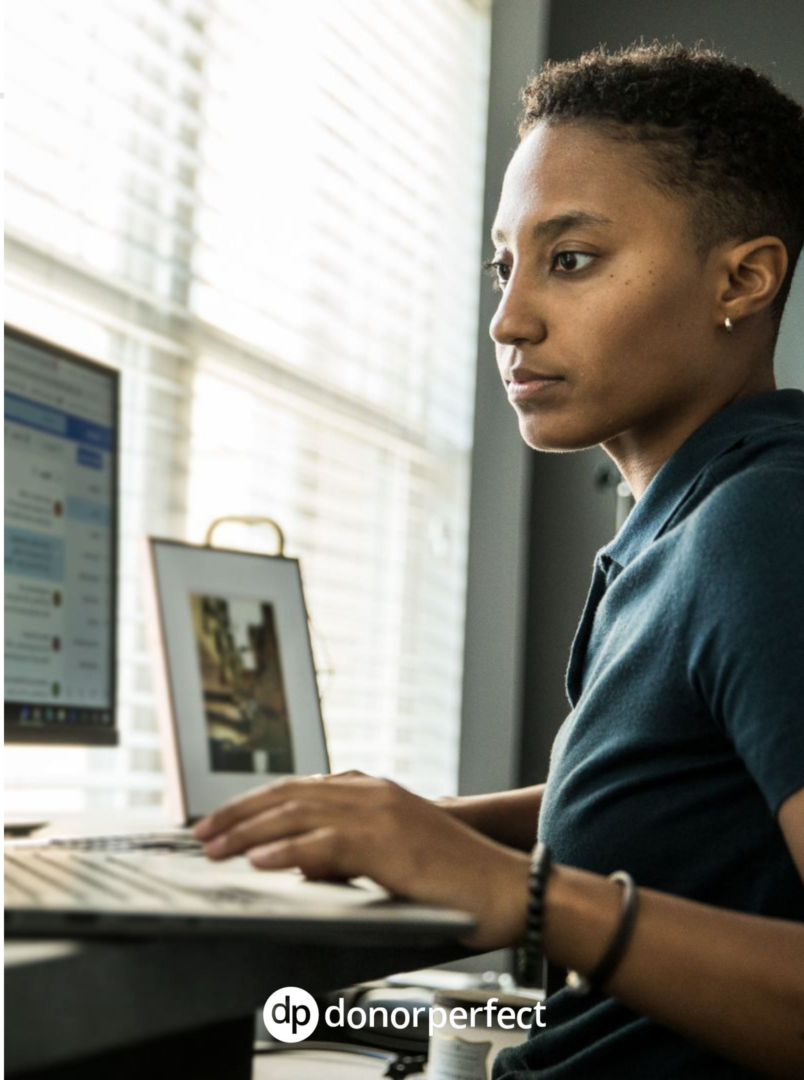
The one who makes decisions

- What information is required to set attainable goals for each campaign?
- What would make it easier to assign tasks and track their completion?
- How accurately can you measure one revenue stream against another?

The Communicator

The one who handles outreach

- How long does it take to personalize your communications - could it be done automatically?
- Is your donor data reliable and complete enough to hit “send all”?
- Do you record conversations that could make great impact stories?



The Administrator

The one who processes information

- Do you have naming conventions for campaigns, appeals, and events?
- Are there inactive codes in the system that should be retired?
- Do you find that details are missing when you create donor lists?

The Networker

The one who puts the word out

- Do you have a set procedure for leveraging your personal connections?
- Do you have data to assess major and matching gift interest?
- Do you have CRM integrations that track mass communications?

Data entry procedure

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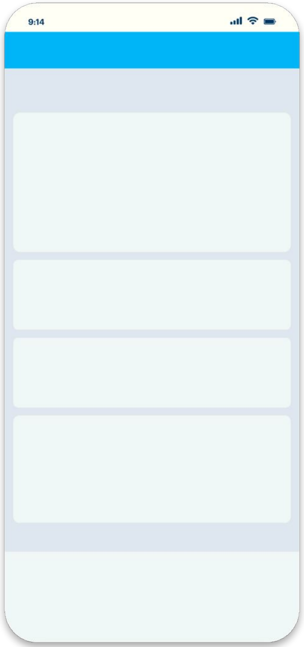
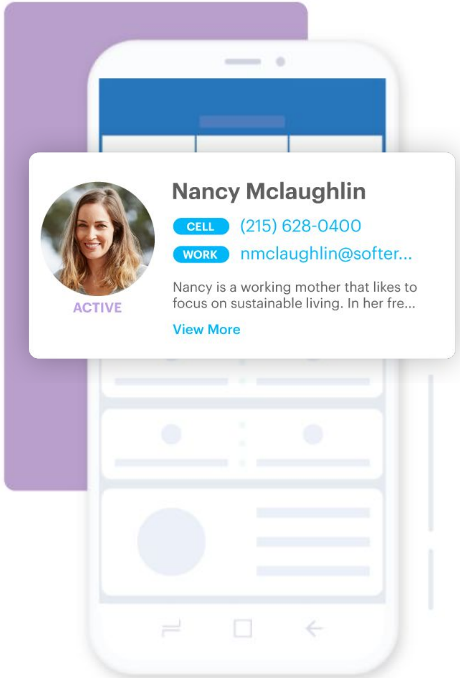
- **Step 1:** Donor data
- **Step 2:** Gift entry
- **Step 3:** Gift follow-up
- **Step 4:** Tracking points of contact
- **Step 5:** Data integrity maintenance



Step 1:
Donor data

Names, addresses, phone numbers, labels, notes, and contact restrictions



Considerations

- How should **names, addresses, and phone numbers** be formatted?
- Do you use **special labels** when creating new donor records?
- How do you enter **notes and restrictions**?

- Nicknames
- Abbreviations
- Salutations
- Titles
- Individuals vs. organizations
- Security settings
- Contact restriction reasons

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Best practices for **names:**

Before adding a new donor, **search through your existing records** to be sure you do not already have a history for them.

Use an optional line field or sub-category field within the main donor's record to **add the spouse or partner's first and last name.**

When entering organizations as constituents, **find a contact at the business** and make a note of their name.

Best practices for **notes:**

A sub-category field can be used to **identify how the constituent is affiliated** with your organization.

When you add a note, **include the date and your initials** so your team knows who to reach out to if they have questions.

When marking contact restrictions, **include a reason** to help you determine if the reason is temporary or permanent.

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Best practices for **leveraging data:**

See if your CRM can use your fields to populate emails and letters. **Personalizing your communications increases the likelihood that donors will open your message and it will resonate.**

Email subject lines that are personalized are 26 percent more likely to be opened, and 88 percent of marketers in the U.S. saw measurable benefits as a result of personalization.

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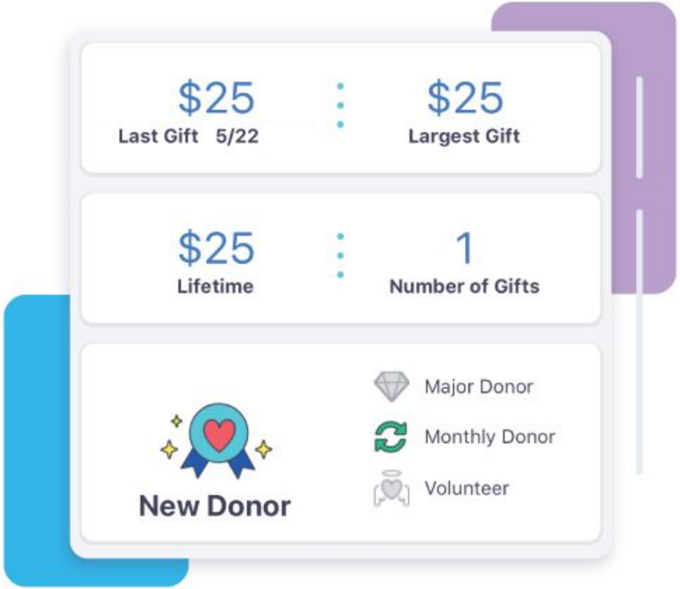
Step 2: Gift entry

First-time, recurring, matching, in-kind, and event gifts, plus soft credits and donor-advised funds



Considerations

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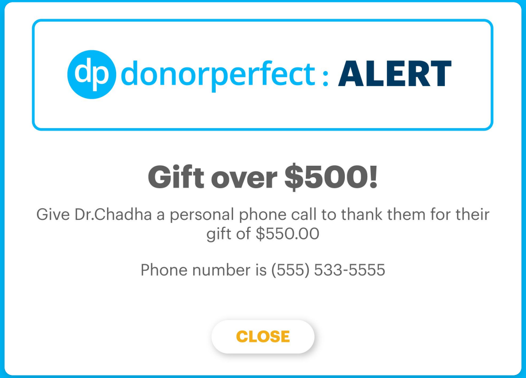
- What **coded fields** do you track?
- How will you **prioritize letter templates**?
- How do you enter each **gift type** differently?
  - First-time, recurring, matching, in-kind, and event gifts; soft credits; DAFs

- Electronic vs. check payments
- Open vs. closed pledges
- Monthly gifts
- Tax-deductible gifts
- Solicitation fields
- Criteria for thanking & acknowledging

Best practices for **gift acknowledgment:**

Establish a **priority order for your letter templates** to ensure donors don't receive multiple letters for the same gift.

Keep donors around by **being attentive to their interests.** Set up alerts for first-time and major gifts.



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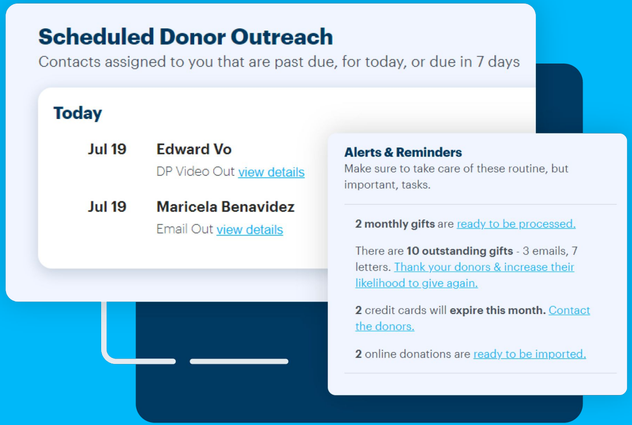
Best practices for **pledges:**

To raise more and increase donor retention, try **automatic monthly giving for pledges.**

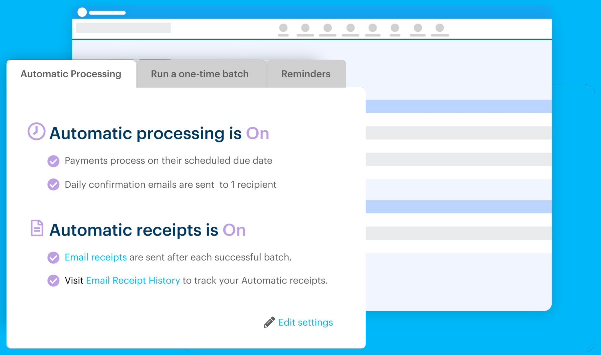
Set reminders to quickly generate invoices for upcoming and outstanding pledge payments.



Best practices for **recurring gifts:**

Try a monthly giving program to keep donors engaged with your mission.

Create a plan to **send impact updates** every few months. These updates can also serve as reminders to update their card info if there have been any changes.



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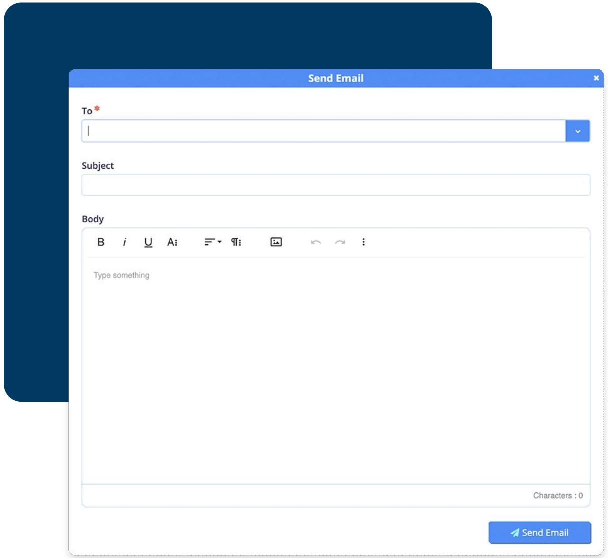
Best practices for **special gift types:**

Create a constituent records for companies who match gifts.

Use two separate fields for tracking in-kind gifts - the first to categorize your gift (e.g. food, clothing) and the second to describe the items (e.g. 20 cans of vegetables) for your thank-you letter.

Identify how you will **include donors who give through a donor-advised fund** when generating donor recognition reports.

Step 3: Gift follow-up



Receipting methods and cases for special recognition

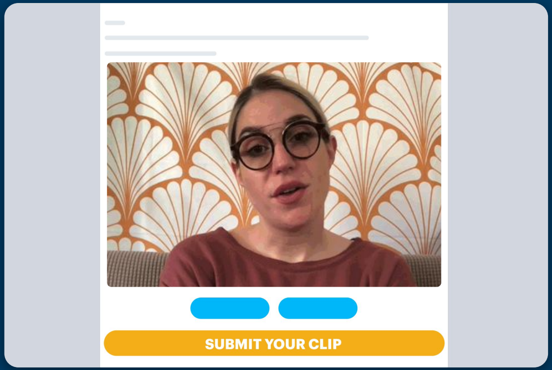
Considerations

- What are your **methods of receipting**?
- When should a user be designated with a **different method**?
- When should a record be marked as **“do not acknowledge”**?
- Should certain donors get **special recognition**?

- Letters
- Emails
- Phone calls
- Welcome packets
- Video messages
- Team members to handle special recognition / how & when to schedule

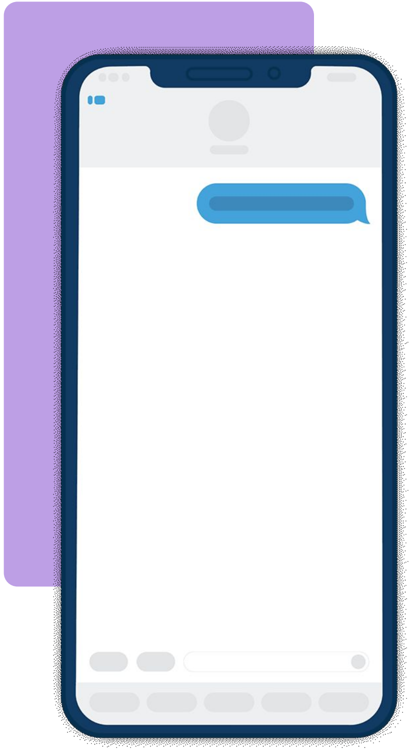
Best practices for **thanking & receipting:**

Without much time or effort, you can **get creative with thanking and receipting for more meaningful exchanges with your donors.** You can also add dynamic fields that pull in donor data like name, gift amount, and more.



Step 4: Tracking points of contact

Contact activities, descriptions, and reports



Considerations

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- What type of **contact activities** do you record?
- How do you document **each type**?
- What type of data should be **recorded in the description**?
- What report(s) should be pulled to **track your points of contact**?

- Contact method
- Initials of person who made the contact
- Initials of person who entered the contact
- Input date
- Next action date
- Next action type
- Summary of contact

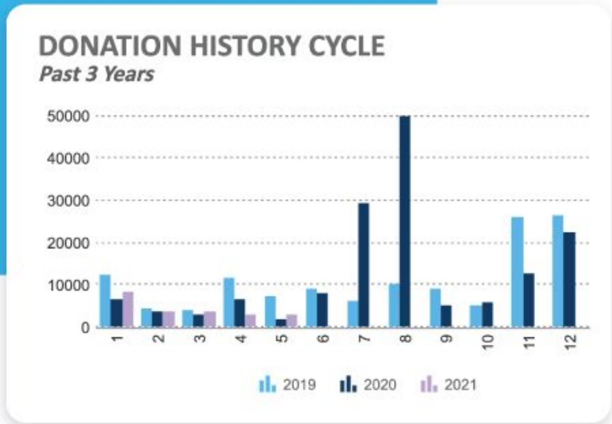
Best practices for **tracking points of contact:**

Be sure to record the initials of the **team member who spoke with the donor and the team member who entered the data.** Record any details that may be relevant in the future.

Assign follow-up to the appropriate team member with a due date.

Step 5: Data integrity maintenance

Avoiding duplicates, address cleanup, donor record removal, and code maintenance



Considerations

- How often should you run a **duplicate report**?
- How often should you **check for incomplete addresses**?
- How often should donor records be **monitored for removal**?
- How often should codes be **reviewed and marked as inactive**?

- Creating backups
- Exporting & saving
- Address tools
- Qualifications for record removal
- Checking old records
- Code monitoring policy
- Code naming conventions

Best practices for **code maintenance:**

When setting up your user-defined codes, create a plan for how you will use them in the long term to avoid limitations in the future.

Standardize your codes as much as possible, publicize them to train staff on their use, and perform regular audits for code removal.

Use the Clean Data Checklist to set standards for your nonprofit.

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Congratulations!

Just by reviewing your procedures today, you're already well on your way to a healthier CRM that helps you bring better fundraising results.

Continue with the [Clean Data Checklist](#) »

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