

September 6, 2023

# Leveraging Technology for Donor Management and Fundraising Intelligence



WELCOME

# Today's Presenters



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LEVERAGING TECHNOLOGY FOR DONOR MANAGEMENT

# Agenda

- Current philanthropy trends
- Ways to leverage Salesforce to combat volatility
  - Donor Segmentation
  - Wealth Engine
  - Donor Journeys
  - Storytelling
- How to start/next steps



2022 (JAN - DEC) vs. 2021 (JAN - DEC)

# Nonprofit Sector Trends



- Total dollars fundraised are **down** 1.7%
- Total donors are **down** 10%
- Donor retention is **down** 3.5%
- New-retained donors (gave prior year, but never before) are **down** 26.4% year-over-year
- Notable from 2021 to 2022, supersize (\$50k+) donors **decreased** 4.7%, responsible for almost half the decrease in dollars raised

*Source: Association of Fundraising Professionals - Fundraising Effectiveness Project*



## FUNDRAISING

# Leveraging Technology to Combat Volatility

- Organizations cannot predict or control external events and market conditions
- Preparation, advance planning, and leveraging data are key – pro-active vs. reactionary mindset
- Organizations should put an increased focus on what they can control:
  - Who you engage – Data Collection for Donor Segmentation
  - What you ask for – Capacity Segmentation with Wealth Engine
  - When you engage – Donor Journeys
  - How well you retain – Storytelling

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# Data Collection Fueling Donor Segmentation

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# Capacity Segmentation With Wealth Engine



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# Capacity Segmentation with Wealth Engine

- Integrates with Salesforce
- Provides wealth profiles
- Support outreach efforts

REPORT  
Leads from WE Prospect

Total Records  
13,610

WE PROSPECT LIST NAME ↑	FULL NAME	STATE	LEAD SOURCE	NET WORTH	TOTAL ASSETS	P2G	GIFT CAPACITY RANGE
List Created 19-Jan-18_1 (19 records)	PAULA F	ID	WE	\$1MM-\$5MM	\$1MM-\$5MM	15	\$75K-\$100K
	JEFF B	ID	WE	\$1MM-\$5MM	\$1MM-\$5MM	33	\$40K-\$50K
	JOHN W	ID	WE	\$1MM-\$5MM	\$1MM-\$5MM	15	\$75K-\$100K
						10	\$30K-\$40K
						25	\$75K-\$100K
						25	\$75K-\$100K
						25	\$50K-\$75K
						25	\$75K-\$100K
						24	\$100K-\$200K
						24	\$100K-\$200K
						25	\$75K-\$100K

▼ Wealth Engine

P2G Score	14.00		Est. Annual Donations	\$1K - \$5K	
P2G Description	1/4 - Excellent		Net Worth	\$1MM - \$5MM	
Gift Capacity Range	\$100K - \$200K		Total Assets	\$1MM - \$5MM	
Description			Cash on Hand	\$10K - \$100K	

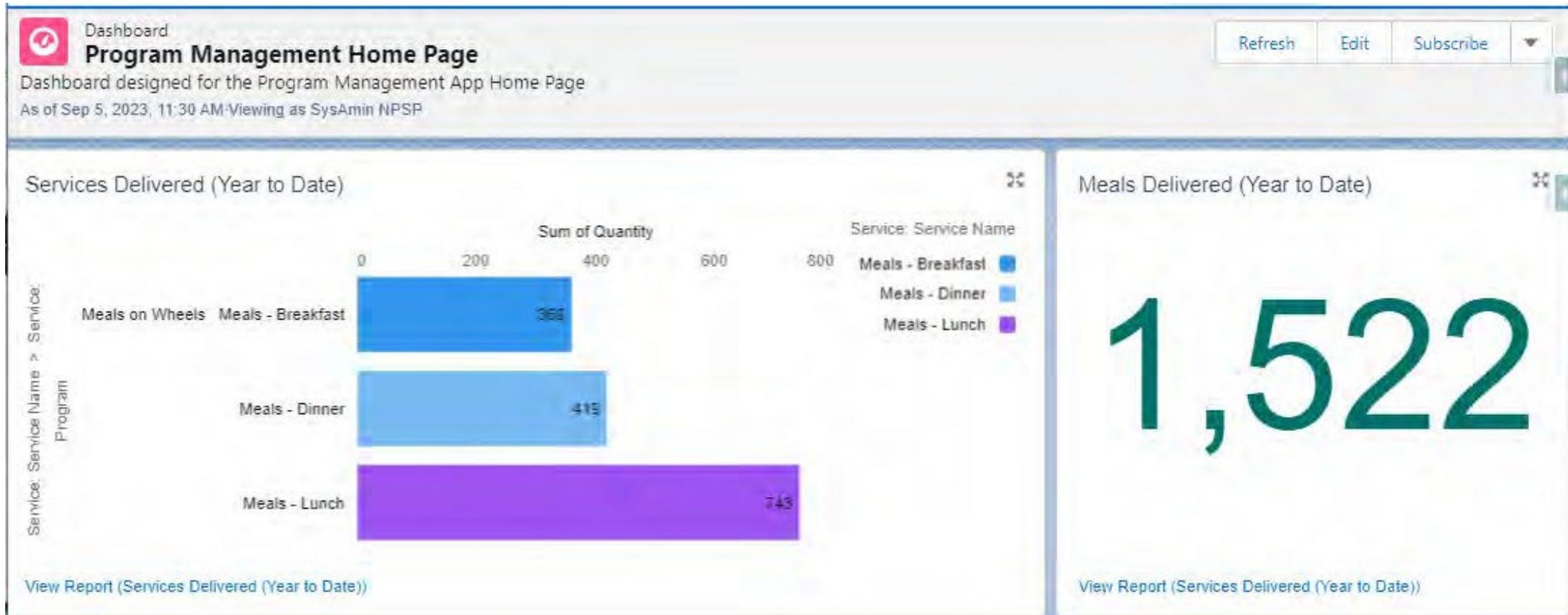
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# Donor Journeys for Engagement

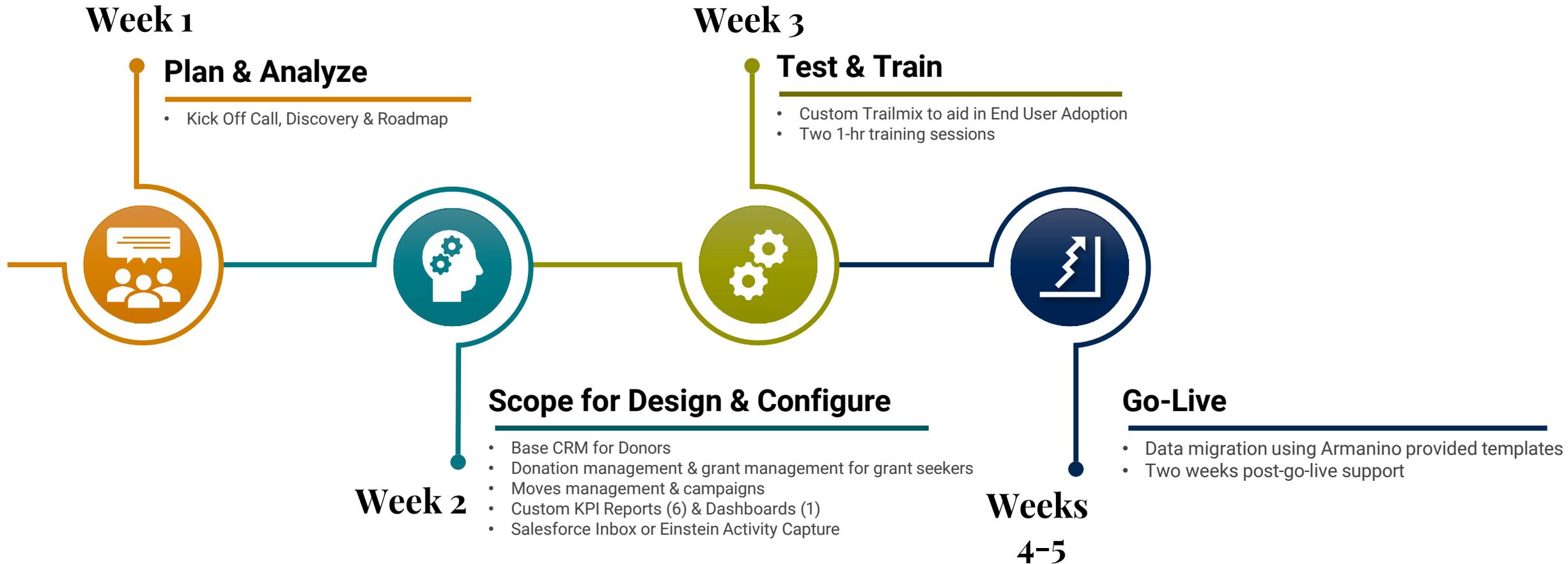


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# Storytelling for Retention



# Nonprofit Cloud Quickstart





NOT SURE WHERE TO START?

# Salesforce Health Check

## Overview

For clients already using Salesforce, Armanino offers a complimentary Health Check, assessing your return on investment (ROI) and risk review, with a focus on mission-critical items.

- Custom code versus configuration
- Custom field counts, data storage and API limits
- Effective use of process builders and workflows; and a high-level assessment of the components in use by the client.
- Effective use of out-of-the-box functionality
- Deployment status of recent Salesforce functionality
- Available user and feature licenses
- Lightning readiness, if applicable

## What You Can Expect



### 2-3 Hours of User Interviews

Meet with Salesforce subject matter experts for 2-3 hours with your Salesforce user group.



### Assessment Report

Report detailing the assessment performed and the health of client's Salesforce org, with explanations of critical items that may need attention, including a high-level estimate of the cost to implement the recommended actions



Thank you for attending  
**Additional Questions?**

Reach out to us at:

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