



**Conquer Your Database,  
Take Over the World!**


JANUARY 16, 2015  
AFP COLORADO LUNCHEON




**YOUR HOSTS**



Lisa Lane  
Beyond Nines



Shannon Morales  
Sidekick Solutions




**#WINNING IN 2015**

- See your database as a value-add
- Confidence in your data leads to confidence in fundraising
- Big change starts with small steps



Spin the wheel at your own risk!

**THE WHEEL OF MISFORTUNE**



**3 WAYS TO DEFINE SUCCESS**

1. Walk backwards from your goals
2. Manage performance – because you can't improve/reward(?) what you can't measure
3. Always ask "why?" for smarter decisions and actions



**3 WAYS TO ENRICH YOUR TEAM**

1. Implement quarterly fundraising/database team meetings
2. Regularly share strategy and results
3. Invest in training to build and retain your team



### 3 WAYS TO IMPROVE RETENTION

1. No longer one-size-fits-all
2. Communicate impact, not just giving
3. Know who is lapsed – use simple LYBUNT report



### 3 WAYS TO REACH YOUNGER DONORS

1. Digital: Expand your definition of friend/supporter
2. Digital: Grow outside of your box
3. Digital: Get out of their way



### 3 WAYS TO TAKE FUNDRAISING ONLINE

1. Optimize your website for action
2. Integrate available database tools for seamless experience
3. Tie in an email component to every traditional campaign



### ANOTHER ONE BITES THE DUST

- Get on the same page
- Got documentation?
- Cross-train for fitness
- Back-up to keep the blues away
- Refresh for success
- Secure your data



### AUDIT ALERT!

- Just like an oil change
- An objective perspective
- Validate your current practices
- Spot opportunities for improvements
- Increase your fundraising capacity
- Assess your database



### DATABASE STRATEGY

- What is a strategy?
- What is a tactic?
- First leads the second
- Recurring tasks are key
- Must devote specific time to strategies



### GETTING GEEKY WITH YOUR DATA TEAM

- Mutual respect is key
- Regularly share strategy and results
- Leverage their tactical knowledge
- Acknowledge *everyone's* roles in meeting goals
- Use the data at your disposal



### MEASURE THIS!

- Determine what's important
- Identify your resources for reporting
- What are you going to do with what you find?
- OK, measure it and communicate it to your team



You're sitting in these groups for a reason  
**GROUP ACTIVITY!**



### TALK AMONGST YOURSELVES

- Greatest database challenge?
- A-ha moments in dealing with your database and data team ?
- What is the one thing you wish your database could tell you about your donors?
- What would you like to automate to make reporting more seamless?
- Top tip to share with the larger group ?



Who's brave enough to go first?  
**IT'S TIME TO SHARE!**



What's on your minds?  
**QUESTION & ANSWER**



THANKS FOR HAVING US!

- Beyond Nines
  - Blog: [www.beyondnines.com/independent-voices/](http://www.beyondnines.com/independent-voices/)
  - Resources: [www.beyondnines.com/independent-user-consultant-community](http://www.beyondnines.com/independent-user-consultant-community)
  
- Sidekick Solutions
  - Blog: [www.sidekicksolutionsllc.com/blog](http://www.sidekicksolutionsllc.com/blog)
  - Resources: [www.sidekicksolutionsllc.com/nonprofit-resources](http://www.sidekicksolutionsllc.com/nonprofit-resources)