



# How One Organization Consolidated Databases to Save Time, Report Better, and Increase Digital Fundraising

## Overview

For one nonprofit organization, accurate and comprehensive reporting was a constant struggle before their migration to EveryAction. Because their database of record was separate from the database which they used for digital fundraising and email, they had to rely on time-consuming manual uploads and an unreliable integration to get a complete picture of their fundraising performance. This resulted in a lack of easy access to important data for decision-makers in the

organization, a lack of trust in their data's accuracy, and time and labor-intensive manual processes of combining and checking reports in order to make up for the database's shortcomings. By switching to EveryAction's unified CRM, they have been able to perform significantly easier, faster, and more accurate reporting, resulting in increased access to, use of, and trust in data across the organization.

## Challenge

- Using two separate databases—one database of record and one to handle digital fundraising and email—meant relying on an integration which didn't share 100% of the information, resulting in time consuming manual uploads and a lack of trust in the data's accuracy.
- Tasks such as targeting donors with an email required a manual upload process to a database which was unable to capture detailed information such as most recent contribution or highest previous contribution.
- Working with consultants and vendors was challenging due to the number of different pieces of data involved and the manual process which left room for errors and oversights.

## Solution

- Consolidating their two databases by migrating to EveryAction's unified platform.
- Using Create A List and Contribution Report to easily see giving by channel and type of donor, as well as historical year-over-year and year-to-date.
- Using the Fundraiser's Dashboard and automated reports to make fundraising data accessible to users across the organization without the need for time-intensive individual reporting.
- Using Saved Searches to allow the email team to send carefully segmented, interest-based emails at any time.
- Working with EveryAction's digital services team to build custom forms that align with organizational branding, are visually cohesive with the website, and are easier for users to navigate.

## Outcome



increase in website donations



increase in individual donors



increase in subscribers

IN THE THREE-MONTH PERIOD POST-LAUNCH.

- Easier, faster, and more reliable reporting done within one unified database.
- Increased trust in the accuracy of reports, due to the lowered possibility of human error when manually joining multiple reports or depending on unreliable information.
- Increased access to and reliance on data across the organization due to the ease of training and user-friendly nature of the tool.

## Searching for a 360-Degree View of Donor Activity

While traditional development programs and digital fundraising may be run by different teams within an organization, their audiences often overlap. Without a full picture of donor data that captures both online and offline giving, both teams may lack important information about their donors, leading to issues such as ineffective ask targeting, duplicate or disjointed communication, and more.

For the organization in question, simple tasks like sending an email targeted specifically to donors required a manual upload between databases—and in this process important information such as last gift amount and HPC was lost, making it impossible to customize the content based on contribution data.

## A Unified Platform Changes Everything

The effects of switching to a unified database were felt immediately. Running an email program based on careful segmentation and personalization no longer required a painstaking process of pulling lists from multiple locations—Saved Searches that automatically update based on a set criteria enabled a seamless process between the data and creative teams.

Complex reporting became a simple task, allowing for deeper and more holistic insight into the organization's fundraising. From monthly wrap-ups to mid-year and end-of-year reports, data could be easily sorted to show giving by channel, by type of donor, and compared to historic information.

**“When I saw the demo, I was so happy. I asked, ‘Can I see last year against this year,’ and not only was the answer yes, but in just three clicks there [the data] was on the screen. That would have taken me a whole day in the past, to get the six reports with the data and put it all together—this was life changing.”**

**– DATA INTELLIGENCE STRATEGIST, ANONYMOUS NONPROFIT**



## Easier, More Effective Digital Fundraising

EveryAction's Digital Services team partnered with the organization to update the digital fundraising capabilities of their website, making sure that their forms and donation pages were clearly and cohesively branded, as well as easy to use. In the first three months after launching EveryAction, the organization saw a 22% increase in the amount raised through their website, along with a 60% increase in number of contributions, and 22% increase in subscribers, indicating that the branded and easy-to-use forms significantly impacted the number of conversions successfully taking place.

Attention to user experience was key. Their Data Intelligence Strategist notes, “It's so apparent that as EveryAction is continuing to build the platform and the tools, they are coming not only from the perspective of ‘How is an organization going to use this; what makes the most sense for those users,’ but also the end user: ‘How are people subscribing, how are people making donations?’” There is obviously consideration of the full scope, and that is so important.”