

► FUNDAMENTAL REPORTING TO YOU MEET YOUR GOALS



PRESENTED BY KENT GILLIAM

Presented May 28, 2014

blackbaudTM
your passion ► our purpose

► INTRODUCTIONS



Kent Gilliam
Senior Programs Manager

Kent Gilliam has been in the nonprofit world for nearly 14 years. After spending 7 years on your side of the software, Kent joined Convio/Blackbaud in 2007 as a consultant on the Convio Services team where he worked 1-on-1 with some of our most successful clients by guiding their strategy approaches and helping them make sense of their history and goals by evaluating their report results.

In the past 3 years Kent has worked as the Luminate Community manager and every day sees and answers questions from clients who need help with everything from strategy and design to conditionals and reporting.

When he's not working, Kent loves to coach youth football, play a little golf, spend a ton of time with his family, and cheer on his Oklahoma Sooners! (BOOMER SOONER!)

Hanging out in chat



Ken Cantu
Manager, Luminate
Success Programs

► TODAY'S AGENDA

- The Most Common Data Reviewed
- How To Perform Quick Reviews (When Possible)
- How to Get Metrics for Most Common Data Requests
- Tips to Help Make Data Collection and Reporting Easier
- Unleash the Beast with Tasks

► THE MOST COMMON DATA REVIEWED

CAMPAIGN MANAGEMENT

- Campaign Performance
 - Donations
 - Total \$\$\$
 - Average Gift \$\$\$
 - # of Gifts
 - Amount
 - “Major Gifts”
- Sustaining
 - The above elements + ...
 - Attempted Transactions
 - Successful Transactions
 - Failed Transactions
 - Projected Monthly Amount

- Granular Data
 - Donor
 - # of New Donors
 - # of Repeat Donors
 - # of New Sustaining Donors
 - Group Performance
 - Source Code Performance
 - Payment Method
 - Bounce Rates
 - Restricted Gift /General Gift
 - Gift designations

BEGINNER

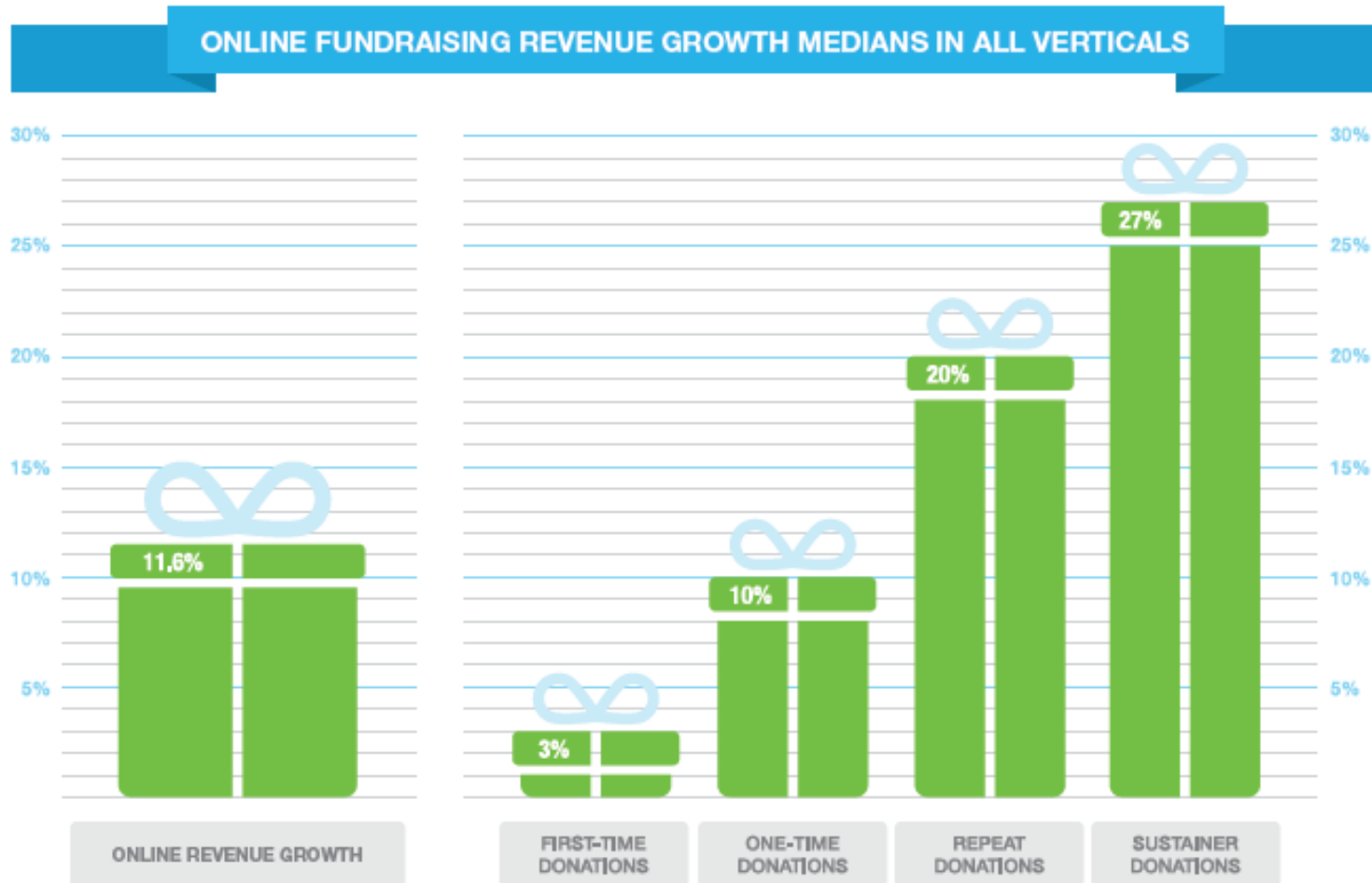


INTERMEDIATE/ADVANCED



► THE MOST COMMON DATA REVIEWED

Does your reporting enable you to compare to Blackbaud benchmark reports?



► THE MOST COMMON DATA REVIEWED

EMAIL

- Campaign Performance
 - Total Emails Sent
 - Total Actions/\$\$\$ Raised
 - Overall Open %
 - Overall Clickthrough %
 - Overall Unsubscribed %
- Message Performance
 - #/% Sent
 - #/% Delivered
 - #/% Opened
 - #/% of Clickthroughs
 - #/% of Actions/Amount Raised
 - #/% of Unsubscribes
- Granular Data
 - Cons that Opened Email
 - Cons that Clicked Through
 - Cons that Unsubscribed

BEGINNER



INTERMEDIATE/ADVANCED



► THE MOST COMMON DATA REVIEWED

Does your reporting enable you to compare to Blackbaud benchmark reports?

EMAIL FUNDRAISING APPEALS IN ALL VERTICALS

14.72%

MEDIAN OPEN RATE

0.7%

MEDIAN CLICK-THROUGH RATE

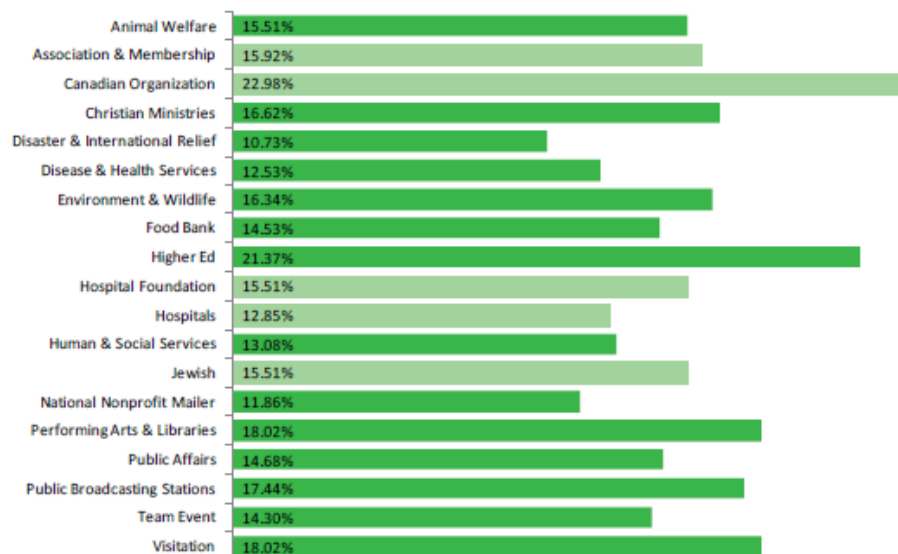
0.5%

THAT'S A 18.77%
DECLINE FROM 2011.

MEDIAN REPOSENSE RATE

- **Are you consolidating data?**
Don't look at just one email's open rate and clickthrough and compare. You have to take an average across all of your emails to compare to the benchmark report

Chart 34 – Fundraising Email Open Rate

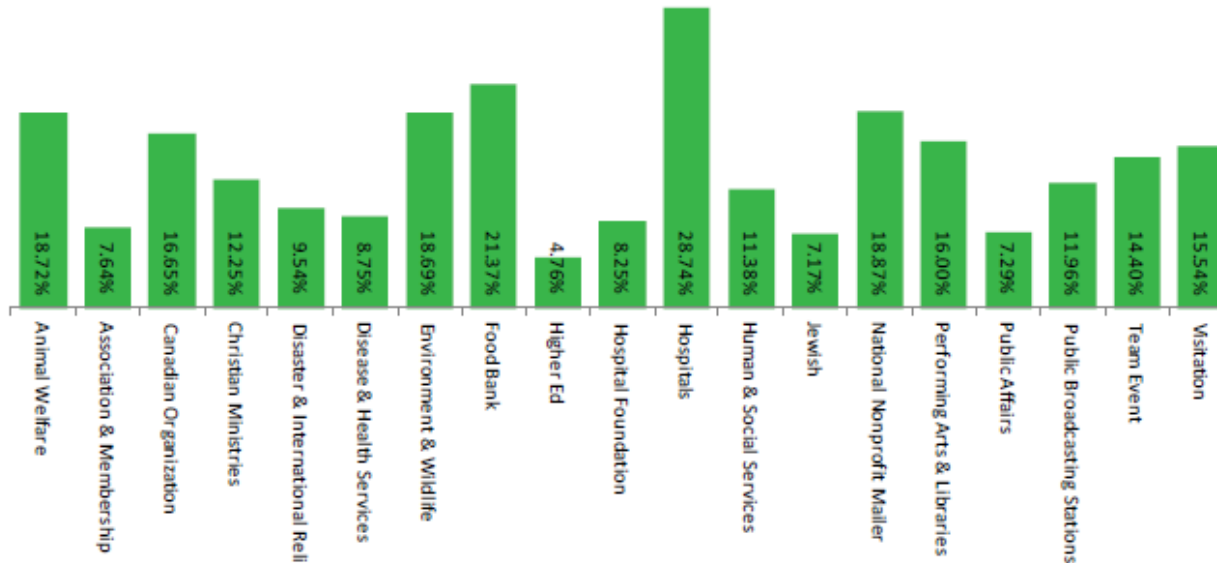


► THE MOST COMMON DATA REVIEWED

HOUSEFILE

- Growth Metrics
 - Total Housefile
 - Usable Housefile
 - New Reg in X Timeframe
 - Opted Out in X Timeframe
- Granular
 - Who Registered
 - Who Opted Out
 - Who Hard Bounced
 - Who Soft Bounced

Chart 7 – Total Email File Growth



BEGINNER



INTERMEDIATE/ADVANCED



► THE MOST COMMON DATA REVIEWED

TEAMRAISER

- Event Performance
 - # of Registrations (Online/Offline)
 - # of Participants by Type
 - # of Teams
 - \$\$\$ Raised (Online/Offline)
 - # of Gifts (Online/Offline)
 - Average Gift \$\$\$
 - \$\$\$ of Reg Fees
 - # of Self-Donors
 - # of Emails Sent
 - #/% Returning/New Participants
 - #/% Actual Fundraisers
- Granular Data
 - Participants Who Updated Page
 - Who Sent X Emails
 - Who Raised \$X - \$XX
 - Who Are Team Captains
 - Who Are Team Members
 - Who Are Individual Participants
- YoY Event Comparison

BEGINNER

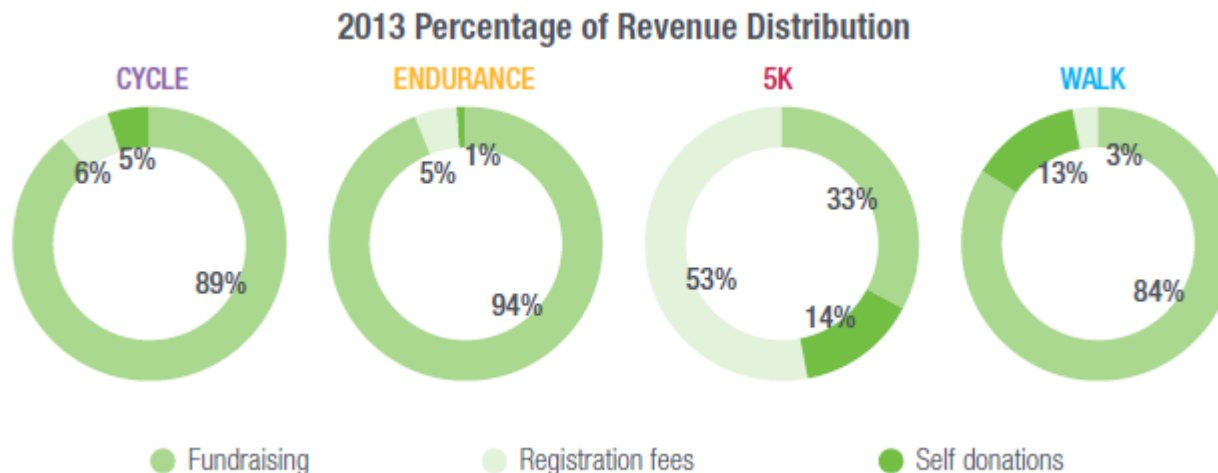


INTERMEDIATE/ADVANCED



► THE MOST COMMON DATA REVIEWED

Does your reporting enable you to compare to Blackbaud P2P benchmark reports?







 2013 Average Online Donation

 CYCLE	\$73.42 ▲ 9%
 ENDURANCE	\$80.05 ▲ 2.67%
 5K	\$54.96 ▲ 4%
 WALK	\$62.02 ▲ 6%

 Participating Donor

 Fundraising Self-Donor

 Non-Self-Donor

Average Dollars Raised Per Participant			
 CYCLE	\$157.24	\$629.62	\$249.14
 ENDURANCE	\$281.63	\$1,270.39	\$498.67
 5K	\$50.65	\$306.12	\$6.91
 WALK	\$60.15	\$361.29	\$31.37

► THE MOST COMMON DATA REVIEWED

ECARDS

- Campaign Performance
 - # of Senders
 - # of Cards Sent
 - # of Recipients
 - # of New Senders
 - # of New Emails Acquired
 - # of Recipient Responses
- Campaign eCards Comparison
 - # of Senders
 - # of Cards Sent
 - # of Recipients
 - # of Recipient Responses
- Granular Data
 - Who Sent Ecard
 - How Many Ecards Each Cons Sent
 - What Ecards Each Cons Sent
 - # of Recipients Each Cons Sent To
 - Result In Site Registration?

BEGINNER



INTERMEDIATE/ADVANCED



► THE MOST COMMON DATA REVIEWED

ADVOCACY

- Campaign Performance
 - # of Invitations Sent
 - # of Unique Opens
 - # of Clickthroughs
 - # of Responses
 - # of Emails
 - Successful
 - Failed
 - # of Faxes
 - Successful
 - Failed
- Granular
 - Who Responded
 - # of TAF
 - # of Printouts

BEGINNER



INTERMEDIATE/ADVANCED



► THE MOST COMMON DATA REVIEWED

CALENDAR EVENTS

- RSVP/Tickets
 - # of RSVPs
 - # Tickets Sold
 - By Ticket Type
 - \$\$\$ Received
 - \$\$\$ Additional Gift
 - Total \$\$\$ Raised
 - # of Seats/Tickets Available
- Granular Data
 - Who Gave Additional Gift
 - Who Used Discounts
 - Additional Questions Responses

BEGINNER



INTERMEDIATE/ADVANCED





► HOW TO PERFORM QUICK REVIEWS

► HOW TO PERFORM QUICK REVIEWS

- **Fundraising Dashboard** - provides summary information for one or more donation forms; can differentiate funds received through a TeamRaiser Event from those given directly to a Donation Form; can also differentiate online from offline gifts

Total Funds Raised:	\$6,781,125.81
Total Raised Online:	\$4,259,954.81
Total Raised Offline:	\$2,521,171.00
Percent Raised Online:	62.82%
Percent Raised Offline:	37.17%

Online Gift Summary

Number of Honor/Memorial Gifts:	63
Number of Joint Gifts:	0
Number of Anonymous Donors:	10
Number of Company Matched Gifts:	256
Number of First-Time Gifts:	318

Online Donation Summary

Number of Online Donations:	1,578
Average Donation Amount:	\$2,699.59
Total Amount Donated Online:	\$4,259,954.81

Offline Donation Summary

Number of Offline Donations:	280
Average Donation Amount:	\$9,004.18
Total Amount Donated Offline:	\$2,521,171.00

TeamRaiser and Personal Fundraising Summary

Total Raised:	\$6,780,153.04
Total from TeamRaisers (registrations and donations):	\$5,923,724.78
Total from Personal Fundraising (registrations and donations):	\$1,205.00
Total from Direct Donations:	\$855,223.26
Percent from TeamRaisers (registrations and donations):	87.37%
Percent from Personal Fundraising (registrations and donations):	0.02%
Percent from Direct Donations:	12.48%

Sustaining Gift Summary

Number of New Sustaining Gifts:	125
Average Monthly Amount:	\$218.58
Number of Donations via Sustaining Gifts:	492
Total Amount Donated via Sustaining Gifts:	\$107,543.72

► HOW TO PERFORM QUICK REVIEWS

• Sustaining Gift List

Donation Management

[Online Giving](#)[Donation Classic](#)[Pending Contributions](#)[Sustaining Gifts](#)[Designated Giving](#)[Membership Types](#)[Donation Reports](#)

Sustaining Gift List

Search for all sustaining gifts using one or more search fields below. From here, you can review sustaining gifts, cancel them, skip a payment, change the payment date or modify the billing information associated with the gift.

Search sustaining gifts matching this criteria.

First Name:

Last Name:

Email:

Constituent ID:

Gift Status:

--No Selection-- ▾
--No Selection--
Active
Postponed
Lapsed


Find failing sustaining gifts.

Last successful payment fell on or before:

Sustaining Gifts

Records 1 - 20 of 174 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 9

Name	Donation Form	Action	Amount	Period	End Date	Last Payment Date
Administrator, System	chris-test2 - Test Form	 	\$25.00	Monthly	No End Date	Apr 25, 2014

► HOW TO PERFORM QUICK REVIEWS

• Sustaining Gift List

Sustaining Gift Details

Contact Information

Names: Administrator, System [View Constituent Profile](#)
Email Address: noreply@convio.com
Phone:

Gift Information

Donation Form: chris-test2 - Test Form
Gift Status: Active
Selected Gift Amount: \$25.00 [Modify Gift Amount](#)
Total Amount Processed: \$325.00
Frequency: Monthly
Start Date: Apr 11, 2013
End Date: No End Date [Modify Gift Duration](#)
Next Payment Date: May 25, 2014 [Modify Gift Date](#)
[Skip Next Payment](#)

Billing Information

Credit Card

Number: *****1111
Exp. Date: 01/2017

Name

System Administrator

Address

11821 Main
Austin, TX 78704-8859
United States

[Enter New Credit Card](#)

Payment Information

Number of Expected Payments: Ongoing

Number of Successful Payments: 13

Number of Failed Payments: 0

ID	Date	Amount	Type	Credit Card	Exp. Date	Result
1	Apr 11, 2013 1:56:42 PM	\$25.00	Visa	*****1111	1/2017	Successful
2	May 25, 2013 12:13:54 AM	\$25.00	Visa	*****1111	1/2017	Successful
3	Jun 25, 2013 12:27:00 AM	\$25.00	Visa	*****1111	1/2017	Successful
4	Jul 25, 2013 4:18:04 AM	\$25.00	Visa	*****1111	1/2017	Successful
5	Aug 25, 2013 5:48:54 AM	\$25.00	Visa	*****1111	1/2017	Successful
6	Sep 25, 2013 4:23:37 AM	\$25.00	Visa	*****1111	1/2017	Successful
7	Oct 25, 2013 4:39:35 AM	\$25.00	Visa	*****1111	1/2017	Successful
8	Nov 25, 2013 3:43:16 AM	\$25.00	Visa	*****1111	1/2017	Successful
9	Dec 25, 2013 3:56:40 AM	\$25.00	Visa	*****1111	1/2017	Successful
10	Jan 25, 2014 4:08:37 AM	\$25.00	Visa	*****1111	1/2017	Successful
11	Feb 25, 2014 4:18:20 AM	\$25.00	Visa	*****1111	1/2017	Successful
12	Mar 25, 2014 5:25:58 AM	\$25.00	Visa	*****1111	1/2017	Successful
13	Apr 25, 2014 12:51:15 AM	\$25.00	Visa	*****1111	1/2017	Successful

Cancellation Information

Sustaining Gift Details ☐ User requested cancellation
☐ Stored card is no longer valid
☐ Other

Additional Comments:

[Cancel Sustaining Gift](#)

[Return to Sustaining Gift List](#)

► HOW TO PERFORM QUICK REVIEWS

- **Advocacy Dashboard** - Provides executive level management information for one or more alerts, including the total number of constituents taking action on one or more alerts, the number of new constituents added during one or more alerts, and the total number of email, fax, and printed letters sent and calls logged for one or more alerts

Report Date: May 19, 2014

[Report Configuration](#)

Alert: All action alerts

Date Range: All Dates

Constituent Response

All Constituents Responding:	156
Standard Constituents Responding:	115
API Constituents Responding:	46
New Constituents Responding:	96

Messages Sent

All Emails:	470
All Faxes:	53
All Printouts:	6
All Calls:	7
Standard Emails:	266
Standard Faxes:	53
Standard Calls:	7
API Emails:	204
API Faxes:	0
API Calls:	0

► HOW TO PERFORM QUICK REVIEWS

- **Advocacy Analysis Report** - Allows you to analyze alert responses across several drill-down categories including recipient name, state and city of respondents, Federal District ID of respondents, donor status of respondents, and source code. The headings in this report are "clickable" allowing you to project different information onto bar and pie charts.

Report Date: May 19, 2014

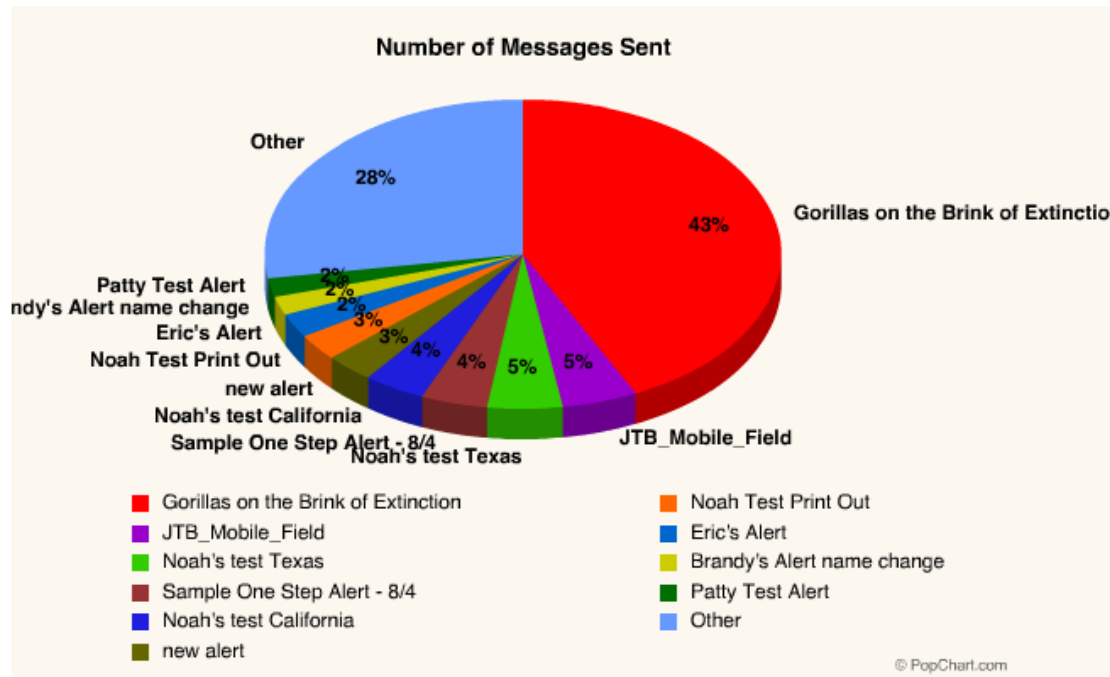
[Add to My Reports](#)

[Report Configuration](#)

Dimension = Alert Name then Recipient Type then Recipient Name

Drilldown Level = Alert Name

Filter Criteria = No Filter



Save as a GIF image

Printable Version

Pie Chart

Bar Chart

► HOW TO PERFORM QUICK REVIEWS

- **Housefile Health -**
Easiest way to view health is to review the “Any Registered User” Group.

Records 1 - 4 of 4 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Name

Any registered user 

Any registered user of the site.

(18012 members as of 01/30/2014 04:44 PM)

Dmitri Test for ANY Autoresponders/Clicker

Participants registered for "Clicker" in the "Dmitri Test for ANY Autoresponders" TeamRaiser.

Noah Test Create Many/Streamer

Participants registered for "Streamer" in the "Noah Test Create Many" TeamRaiser.

Site Visitors 

Any user of the site whether registered and logged in or not.

Group Summary

Group ID:	2
The number of users in this group:	18508
Number of active users in the group:	18012
The number of users with an email status of Hard Bounce:	122
The number of users with an email status of Soft Bounce:	0
The number of users who opted out of email:	1113
The number of users with valid email:	6687

Last Update At: Jan 30, 2014 4:44:49 PM



[Refresh Summary](#)

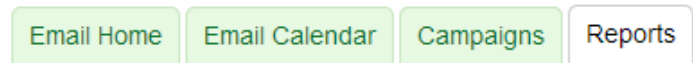


► WHERE & HOW TO GET YOUR DATA

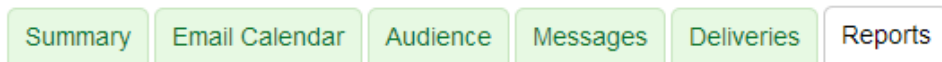
► UNDERSTAND WHERE TO GET YOUR DATA

Reporting tools can be found throughout Luminate Online and knowing which report will give you the data you need can sometimes be confusing. We hope this section will help you better understand what reports you should be using and how to make using them easy

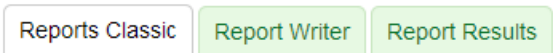
Email



Email



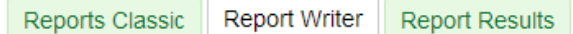
Reports



Donation Management



Reports



► WHAT RESULTS CAN YOU ADD TO OR CREATE A GROUP

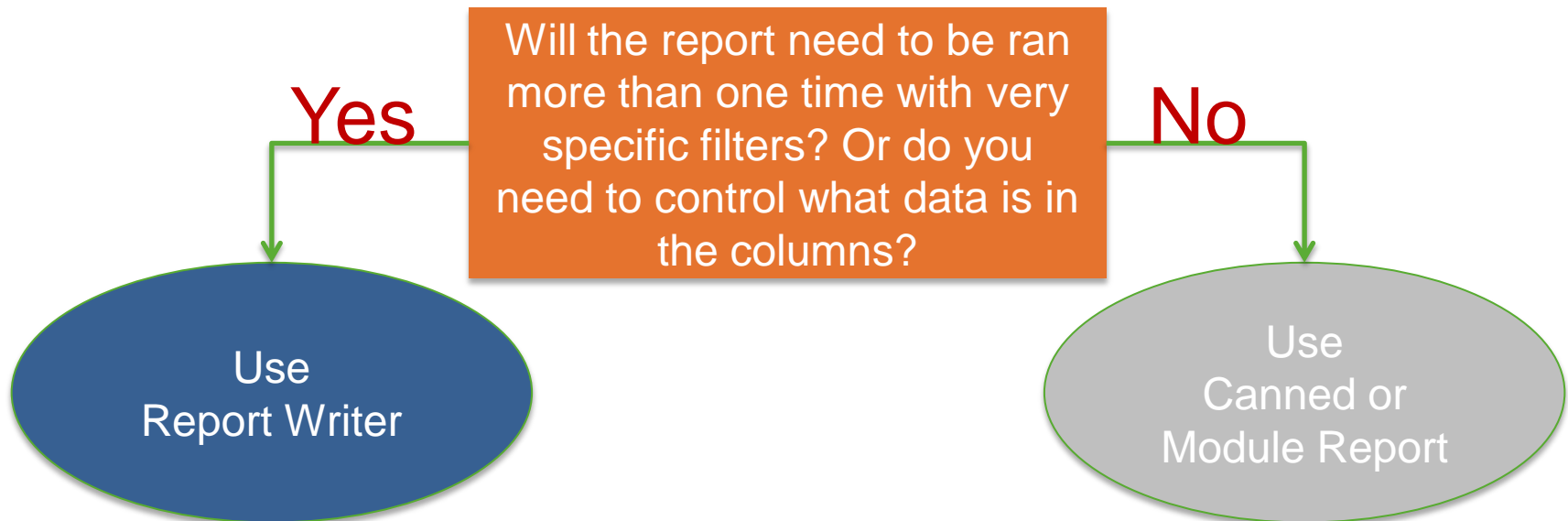


Every now and then you need to use report results to create a Group. This simple rule will help you remember what report results you can use: **You can only use report results to create a Group when the resulting data includes constituent contact information.** However, you cannot use any report results from *Donation Management*.

- Email
 - Click-through Details Reports
 - Response Details Reports
 - Unsubscribe Details Report
- Donations
 - Transaction Report (*Reports Classic*)
 - Refund Report (*Reports Classic*)
 - Settlement Report (*Reports Classic*)
 - Sustainer Giving Payment Report (*Reports Classic*)
 - Sustainer Giving Expected Payment Report (*Reports Classic*)
- Calendar Events
 - Events Transaction Report (*Reports Classic*)
- Advocacy
 - Alert Respondent Report (*Reports Classic*)
 - Alert Deliver Failure Report (*Reports Classic*)
- TeamRaiser
 - Part. Reg Report (*Reports Classic*)
 - Part. Performance Report (*Reports Classic*)
 - Unconf. Gifts Report (*Reports Classic*)
 - Event Check-in Report (*Reports Classic*)
 - Transaction Report (*Reports Classic*)
- Contacts
 - Top Referrers (*Reports Classic*)

► UNDERSTAND YOUR DATA: Reports

Here's a simple tip to help you choose the reporting method best for you.

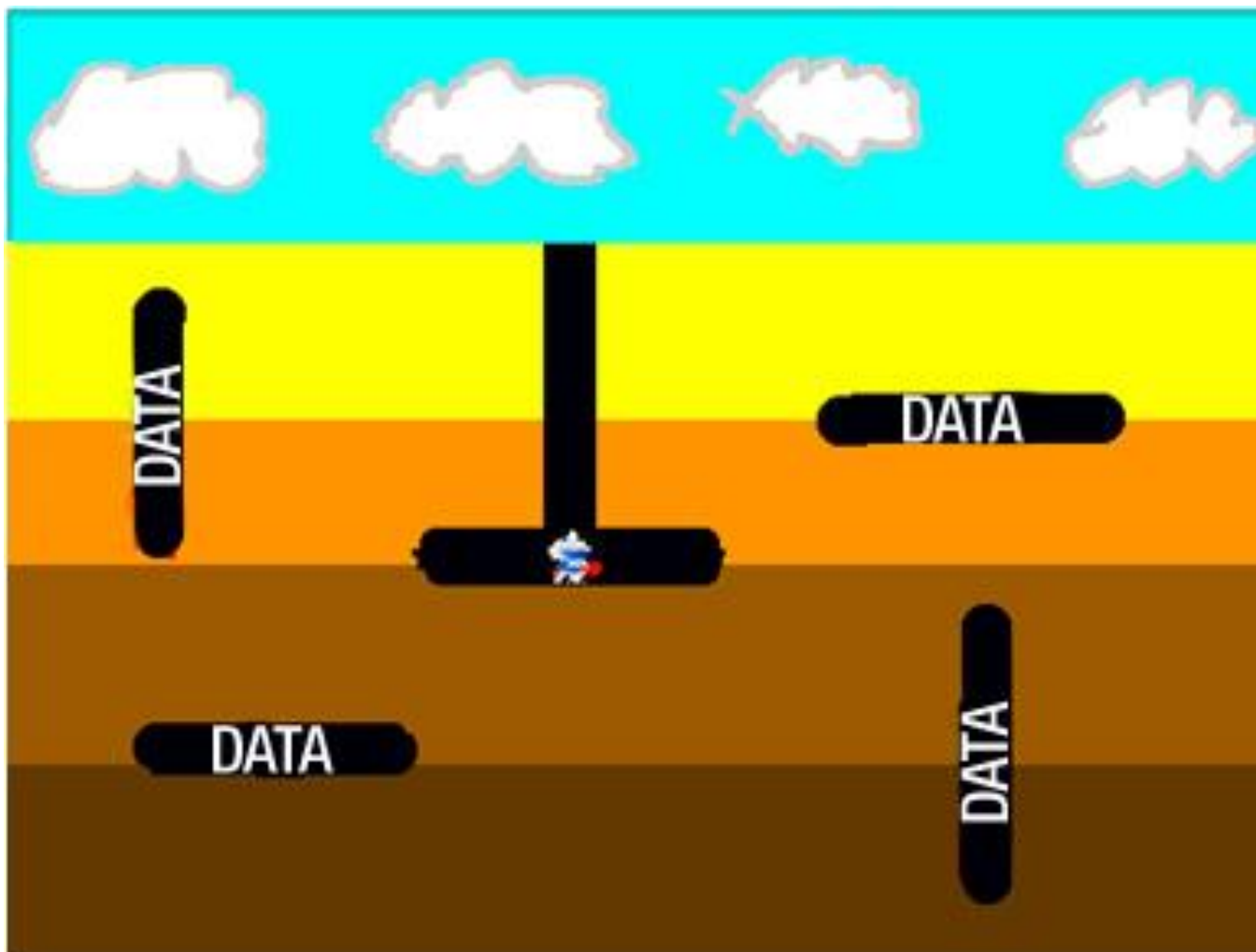


► COMMON QUESTIONS WE SEE

- Can you suggest a few specific reports that would be the most beneficial for us to use?
- How do we find the number of usable emails in our housefile?
- What is the best way to track email campaign performance?
- How do I pull reports to look at performance of segmented groups?
- How do I pull a report of my biggest donors?
- How do I pull a report on Sustainers?



► THINGS YOU CAN DO TO DIG YOUR WAY OUT OF DATA



► SOME TIPS TO HELP MAKE DATA COLLECTION & REPORTING EASIER

- Donations
 - Configure a Group for every campaign
 - Configure a Group for every donation level donor
 - Create query-built Group that filters “Active Sustaining Donors” and “Lapsed Sustaining Donors”
- Email
 - When A/B testing, use “static” Groups to ensure constituents don’t cross over from one Group to the other
 - Explore using Interest Groups (opt-ins) and configure email links to automatically add people to those Groups when clicked
- You can automate a lot of your data-collection needs by using Tasks...

► TASKS...



UNDERSTAND YOUR DATA: Tasks

Task	Description
Contact Approval	This task manages Contact records that are awaiting approval.
Contact Monitor	This task allows you to monitor Contact record changes.
Content Importer	This task allows you to import syndicated content from affiliated Convio sites.
Duplicate Finder	This task helps you identify potential duplicate contact records.
Email Response Rate Segmentation	This task allows you to rank and segment constituents based on e-mail responsiveness.
Interest Segmentation	This task helps you to segment constituents based on interests that they have selected.
Invalid Email	This task helps you identify and manage situations where we've been unable to reach Contacts via e-mail.
RFM Segmentation	This task allows you to rank and segment constituents based on recency/frequency and monetary value of their donations.
TeamRaiser Participants	This task filters participants in TeamRaiser events.
Web Site Engagement Segmentation	This task allows you to rank and segment constituents based on interactions with the web site.

- “Define what tasks are and how they operate”
- Tasks simply enable you to dive deeper & know more about WHO your constituents are and WHAT they are doing!
- This kind of info helps you see better **what they WILL do**

UNDERSTAND YOUR DATA: Tasks

- Want to see who is opening email?
- See who hard/soft bounced on the last email
- See who your most-valuable constituents are based on their Recency, Frequency and Monetary value of their donations
- If you're a TeamRaiser client... GET TO KNOW YOUR AVAILABLE TASKS!
- Know who your most engaging constituents are based on:
 - # of times they login
 - Campaign visits
 - eComm purchases
 - Pledges and pledge payments
 - Event RSVPs and ticket purchases
 - Action alerts
 - TeamRaiser registrations
 - # of Surveys taken
 - # of Tell-A-Friends sent

Task
Contact Approval
Contact Monitor
Content Importer
Duplicate Finder
Email Response Rate Segmentation
Interest Segmentation
Invalid Email
RFM Segmentation
TeamRaiser Participants
Web Site Engagement Segmentation

► QUICK RFM INFO

RFM Segmentation

* = Required Fields

* Name:

* Description:

* Security Category:

Active? ☒ Yes ☐ No

How often should I run the segmentation?

- ☐ Run once a day
☒ Run once a week

Query Details

Field Type: Field:

UNDERSTAND YOUR DATA: Tasks



Be proactive and think “long-term data needs” with Tasks!

- Tasks are great for gathering constituent data for analysis later

- Common Community question:

“How do I run a report to see who hasn’t opened an email?”

- Without Tasks:

- Must run message details report on every email over the timeframe you need open info for
- Put results into group
- Run query and filter everyone not in group
- Must run new report each time you want to generate this data

UNDERSTAND YOUR DATA: Tasks

- Use this task to easily group people who proven they are alive
- Choose the Engagement Factor you want to use.
- Set a weight
- The result:
 - You can query “Engagement Factor X equals X” to find constituents who have/have not done X

* Name:

* Description:

* Security Category: General

Active? ☐ Yes ☒ No

Include these interaction types:

Interaction Type	Weight
E-mails Received	0
E-mail Opens	0
E-mail Click-throughs	0
Forwarded e-mails	0
E-mails Sent	0

Include e-mail responses up to this many days old:

How often should I run the segmentation?

☐ Run once a day

☒ Run once a week

For **ADVANCED** reporting you simply cannot get the depth of segmentation or profile data you need without using Tasks!

Doing it manually each time will make you look like this guy



► UNDERSTAND YOUR DATA: Reports

- Ultimately you should choose a report that you feel is the easiest for you to create and generates the data you need
- Sometimes the tool you use is not even a report – sometimes it's a query
- Take advantage of our **FREE Reporting Kit** that enables you to easily assimilate five years of donation data and give you great year-over-year and end-of-year comparison data.

Download your free kit at customer.convio.com/kits

- If you need help with reporting, check out our new resource page that will help you get the most common reporting data elements

customer.convio.com/reporting

Go! TeamRaiser *Lite*

8 weeks. Data-driven emails. Reporting. And more.

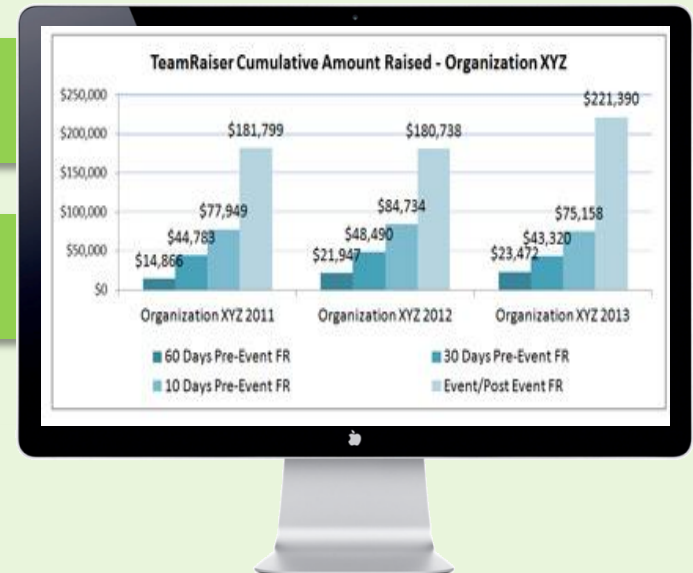
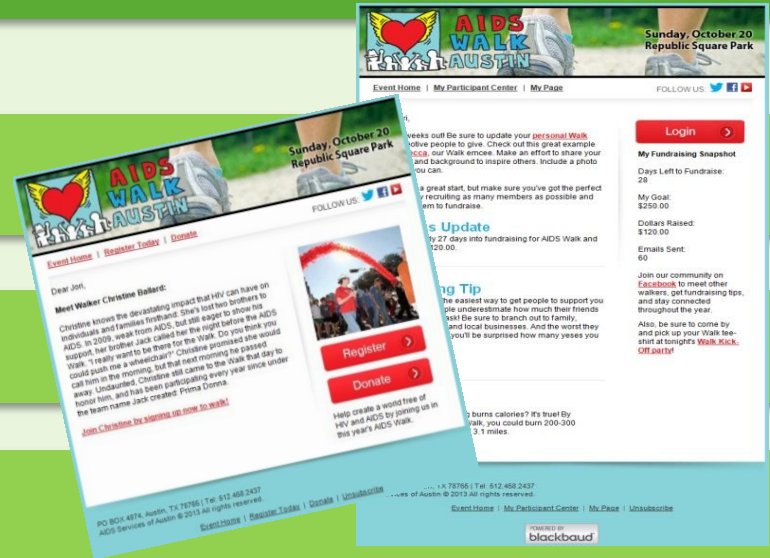
Campaign Strategy

Tools Training

Email Production

Custom Report Template

Support



Interested in learning more?

Email us: GoTeamRaiser@blackbaud.com

► THANK YOU FOR ATTENDING!

Links to the slides, webinar recording and resource page will be sent to everyone that registered for today's webinar either late this afternoon or tomorrow morning.

Be sure to search “May webinar” in the Community to post any questions you may have about today's topic.

Be sure to visit our Community Webinar page at customer.convio.com/webinars to register for next month's webinar on “**Sustainer Stewardship**”

Hosted by Danielle Johnson Vermenton & Chas Offutt



Interactive

Sustained giving donors give more over time and stay around longer, but that doesn't mean your work is done once they sign up. During this session Blackbaud consultants will present tactics for sustainer stewardship and how that builds your efforts for gift upgrades.