

Tools for Increasing Fundraising Effectiveness & Efficiency



LEARNING OUTCOME

After participating...

...able to identify and implement the latest technologies in your fundraising or alumni relations work.



AGENDA

- Leveraging the Latest Digital Tools for:
 - Event management
 - Prospecting and qualifying donors
 - Donor visits
 - Travel management
- Optimizing Event and Visit Follow-Up
- Data Security Considerations

POLL

Are you issued smartphones and tablets with your work?

#Altraining

LEVERAGING APPS



EVERYDAY MANAGEMENT: EVERNOTE



EVERYDAY MANAGEMENT

EVERNOTE FEATURES:

- Notebook
- Tasklist
- Contacts
- Travel
- Images
- Websites
- Maps



 **RESOURCE**

Evernote

<https://evernote.com/>



EVERYDAY MANAGEMENT: BASECAMP



PROJECT MANAGEMENT: BASECAMP



Manage your team project

Tools for Increasing Fundraising Effectiveness & Efficiency

The screenshot shows a Basecamp workspace for a project named "Building BC3". At the top, it says "The Best Version of Basecamp We Know How To Build" and features a row of team member avatars. The workspace is organized into several panels:

- To-dos (408/751):** A list of tasks under the heading "Awaiting triage".
- Schedule:** A calendar view showing dates for "Full launch" and "BC4 launch".
- Message Board:** A list of recent messages with user avatars and notification counts.
- Campfire:** A chat log showing messages from team members like Connor Murthead, Scott Upton, Ann Golak, and Jonas Doerney.
- Automatic Check-ins:** A section with a poll question: "What did you work on today?" and a follow-up question: "Do you feel like BC3 has gotten better over the last couple weeks?".
- Docs & Files:** A section containing links to documents like "Customer E...", "What's deployed to BC3?", and "Post Launch".

The logo for "ai ACADEMIC IMPRESSIONS" is visible in the bottom right corner of the screenshot.

This slide features a dark brown header with a magnifying glass icon and the word "RESOURCE" in white. Below the header, the word "Basecamp" is written in a large, bold, black font. Underneath, the URL <https://basecamp.com/> is provided in blue. The "ai ACADEMIC IMPRESSIONS" logo is located in the bottom right corner.

CALENDAR MANAGEMENT: SUNRISE



The best integrated calendar out there!

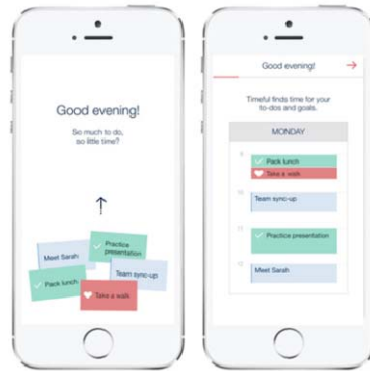


RESOURCE

Sunrise

<https://calendar.sunrise.am/>

CALENDAR MANAGEMENT: TIMEFUL



Helps manage short focused bursts of time in order to create habits



RESOURCE

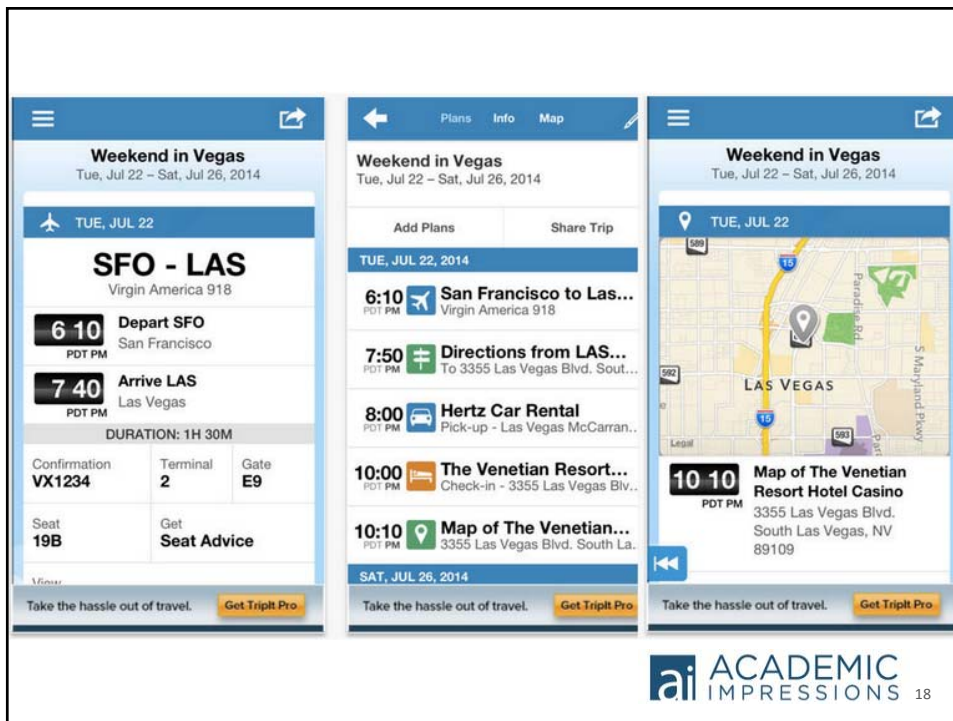
Timeful

<http://www.timeful.com/>

TRAVEL MANAGEMENT: TRIPIT



Syncs flight, hotel, reservation and other entertainment confirmations



TRAVEL MANAGEMENT: EVERTRUE

The screenshot displays a travel itinerary for John M. Eckman. It includes a flight on United Airlines 0525 from Boston (BOS) to Chicago (ORD) at 6:00am. Below the flight, there are directions from ORD to the Hilton Chicago, a map of Chicago, IL, and a hotel check-in on 10/11/2007. The hotel information includes the address 720 South Michigan Avenue, Chicago, IL 60605, and contact details. The interface also features a 'Help us improve TripIt!' feedback prompt with a star rating and a 'delete' button for each item.

Travel management features also available in EverTrue



RESOURCE

Tripit

<https://www.tripit.com/>

TRAVEL
MANAGEMENT:
UBER



Ugh! Its raining
won't be able to find
a cab



RESOURCE

Uber

<https://www.uber.com/>



TRAVEL MANAGEMENT: WAZE

Map out first visit and check traffic



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RESOURCE

Waze

<https://www.waze.com/>

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TRAVEL
MANAGEMENT:
HOTEL TONIGHT



Storm turns ugly,
flight cancelled,
need a room




RESOURCE


Hotel Tonight

<https://www.hoteltonight.com/>

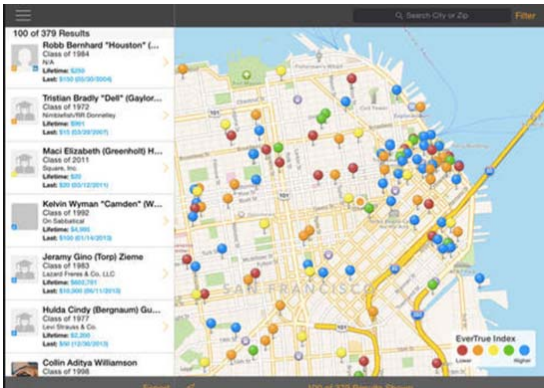


 **CHAT**


What other apps or tools have you found helpful to assist with travel management?



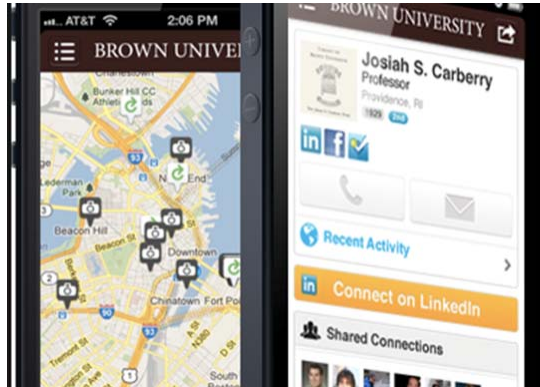
**PROSPECT IDENTIFICATION:
EVERTRUE**



Connects internal donor data and external social data to increase fundraisers' field efficiency



PROSPECT IDENTIFICATION: EVERTRUE



Connects internal donor data and external social data to increase fundraisers' field efficiency



PROSPECT IDENTIFICATION: EVERTRUE



Also an Alumni and Research Resource



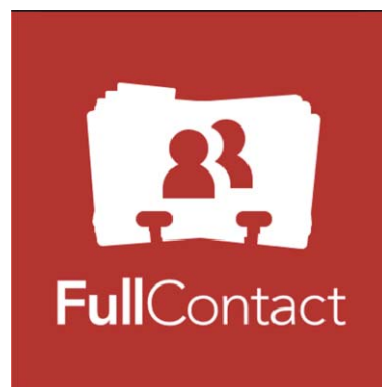


RESOURCE

EverTrue

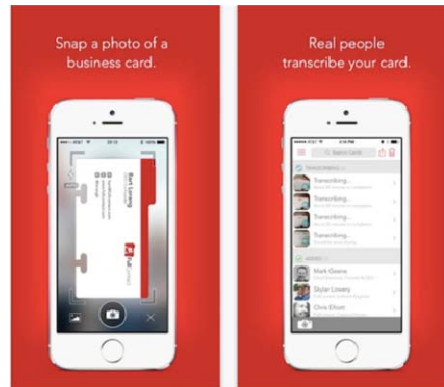
<http://www.evertrue.com/>

■ PROSPECT IDENTIFICATION: FULLCONTACT



Capture donor's
business associates
info

■ PROSPECT
IDENTIFICATION:
FULLCONTACT



Similar feature in
EverTrue

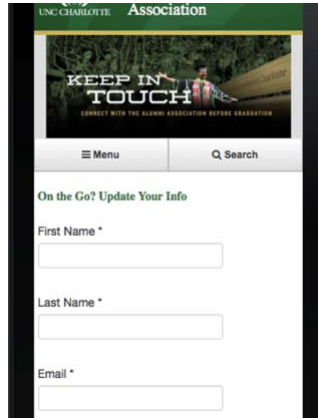


RESOURCE

FullContact

<https://www.fullcontact.com/>

UPDATE ALUMNI
INFO:
SHORTFORM



The screenshot shows a mobile application interface for the UNCC Charlotte Alumni Association. At the top, there is a banner with the text 'KEEP IN TOUCH' and 'CORRECT WITH THE ALUMNI ASSOCIATION BEFORE GRADUATION'. Below the banner is a navigation bar with 'Menu' and 'Q Search' options. The main content area is titled 'On the Go? Update Your Info' and contains three input fields: 'First Name *', 'Last Name *', and 'Email *'.

Make obtaining updated alumni
information easier



RESOURCE

ShortForm

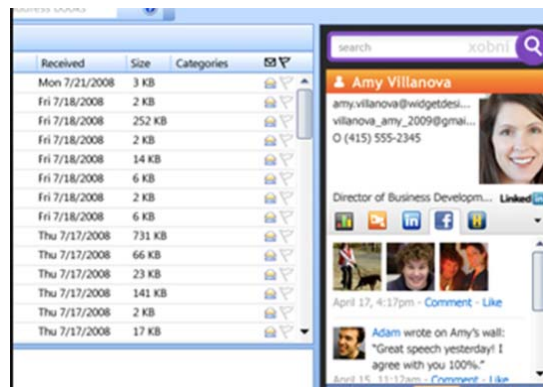
From Mobile Phone: <http://alumni.uncc.edu>

PROSPECT MANAGEMENT: XOBNI



Integrates your email with social data

PROSPECT MANAGEMENT: XOBNI



• Integrates your email with social data



RESOURCE

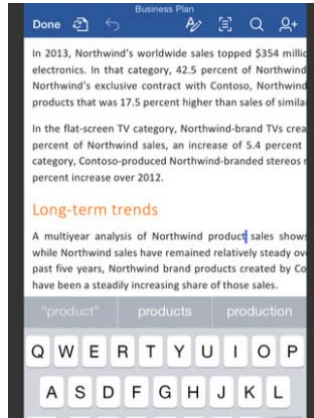
Xobni

<http://address.yahoo.com/xobni>



QUESTIONS

PROPOSAL MANAGEMENT: APPS FOR OFFICE



- Microsoft Office APPS



RESOURCE

Apps for Office

<https://store.office.com>

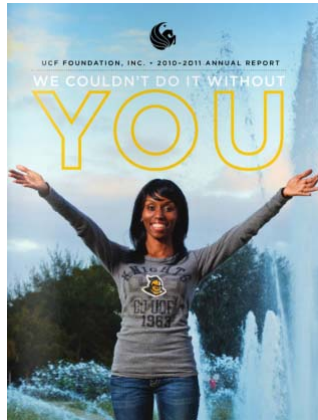
PROPOSAL MANAGEMENT: ISSUU



Make your proposal amazing



■ PROPOSAL
MANAGEMENT:
ISSUU



Make your proposal amazing



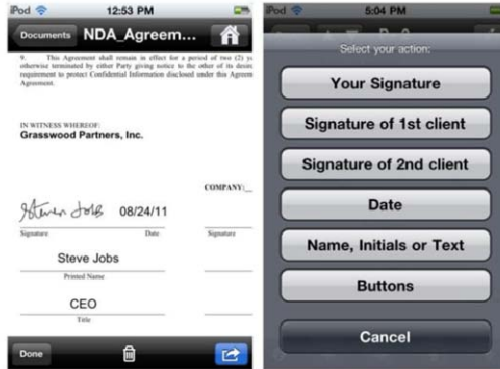
RESOURCE

Issuu

<http://issuu.com/>



**CLOSE A
GIFT:
SIGNEASY**



Sign documents on
any mobile device



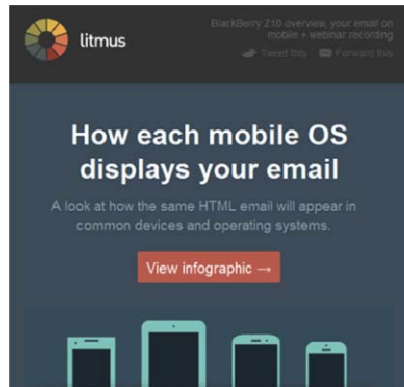
RESOURCE

SignEasy

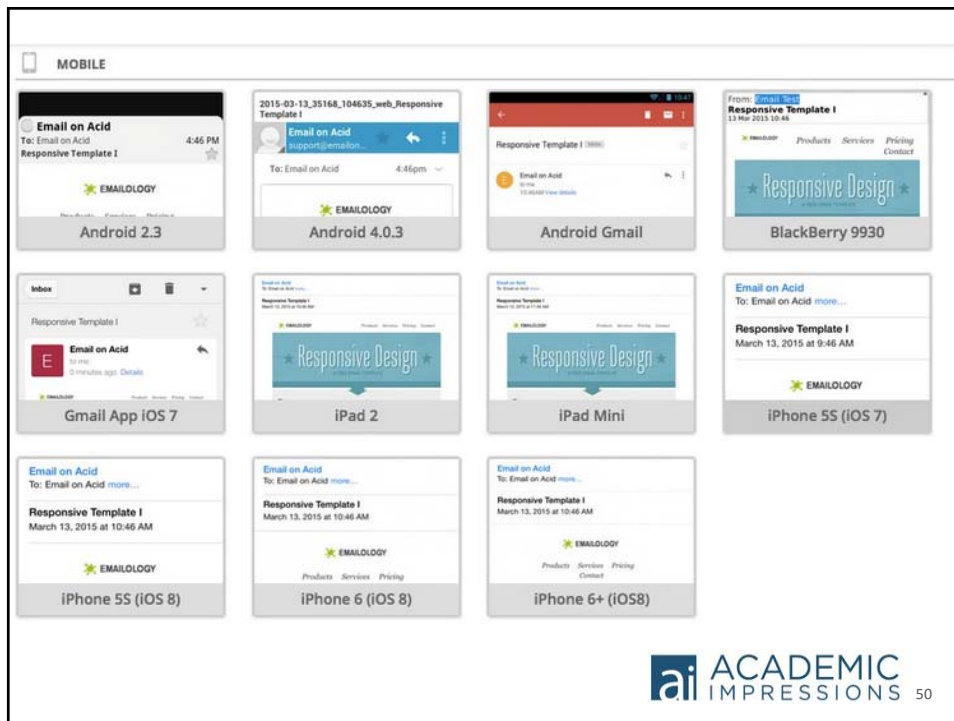
<http://getsigneasy.com/>



EMAIL TESTING: LITMUS TEST



See what your email will look like





RESOURCE

Litmus Test

<https://litmus.com/>

VIDEOS: ANIMOTO



Make a quick custom video

VIDEOS: ANIMOTO

How to make a video
Simple and fun, three steps and you're done!

Make a quick custom video



- 1**
INSERT PHOTOS & VIDEOS
Upload from your computer or grab from Facebook, Instagram, Picasa, Flickr and elsewhere.
- 2**
CUSTOMIZE YOUR STYLE
Select a video style, choose some music, add a few words of your own...and poof!
- 3**
WATCH & SHARE
Observe the awesomeness that is an Animoto video, and share it online with people you love.

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RESOURCE

Animoto

<https://animoto.com/>

ai ACADEMIC IMPRESSIONS 54

EVENT MARKETING: HOOTSUITE



Build buzz on twitter for tonight's event



EVENT MARKETING: HOOTSUITE



Build buzz on twitter for tonight's event



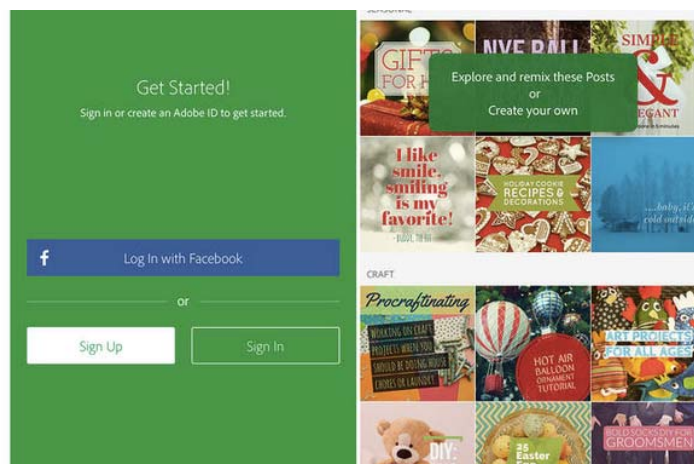


RESOURCE


Hootsuite

<https://hootsuite.com/>

SOCIAL CONTENT CREATOR: ADOBE POST



- EASY SIMPLE GRAPHICS



Empowering the world to design.

59

The image shows the Canva logo, a teal circle with the word "Canva" in white script, centered over a blurred background of various posters and signs. Below the logo, the tagline "Empowering the world to design." is written in a clean, white sans-serif font. The number "59" is located in the bottom right corner of the slide.

- FUN ANIMATED VIDEO AND PRESENTATIONS



60

The image features the Powtoon logo in a stylized, colorful font (red and blue) with a white outline, set against a yellow background. Below the logo, there is a black silhouette of a person in a suit with hands on hips. To the right of the silhouette, there are four white banners with text: "SPICE UP YOUR PRESENTATIONS" (blue), "UNLEASH AWESOME ANIMATED VIDEOS" (green), "CAPTURE THAT PROFESSIONAL LOOK-AND-FEEL" (red), and "DRAG & DROP SIMPLE" (black). The number "60" is in the bottom right corner.

■ CREATE A
SENSATION:
THUNDERCLAP



■ EVENT
MANAGEMENT:
MAGIC PLAN



Map your event
space

■ **EVENT
MANAGEMENT:
MAGIC PLAN**



Map your event space



RESOURCE

MagicPlan

<http://www.floorplanner.com/magicplan>

EVENT MANAGEMENT: CHECKINEASY



Check in guests at your event

Guest check-in powered by
CheckInEasy.com



EVENT MANAGEMENT: CHECKINEASY



Send an alert to your VP that a certain guest has arrived

Text and Email Alerts
Get notified when your special guests arrive

CheckInEasy.com



EVENT MANAGEMENT: CHECKINEASY



Add a Guest on the fly at any time!

Add an unexpected guest and capture their data



EVENT MANAGEMENT: CHECKINEASY

Export QR Codes for Each Attendee!

↑ your attendee engagement by placing a unique QR code on name badges, ID cards, or anything else you'd like.

[DOWNLOAD QR CODES >](#)

Create and export QR codes in a single click.

Use the same QR code to check in attendees at multiple events or sessions.

Use Mail Merge to create custom-designed badges.

After the event, access reports to view session attendance, attendee engagement, and metrics on your whole event!

The perfect solution for:

- ✓ Conferences with breakout sessions
- ✓ Multi-day events that require check-ins
- ✓ Year-long events/classes with the same guests



Print nametags for multi day events so that the attendee can be scanned in.





RESOURCE

CheckInEasy

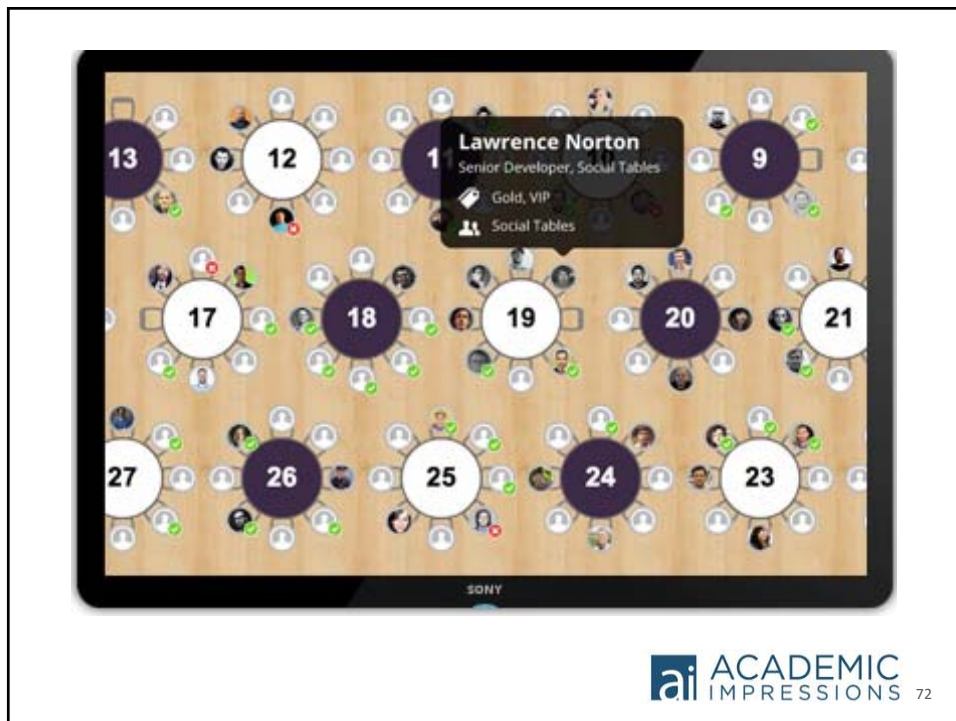
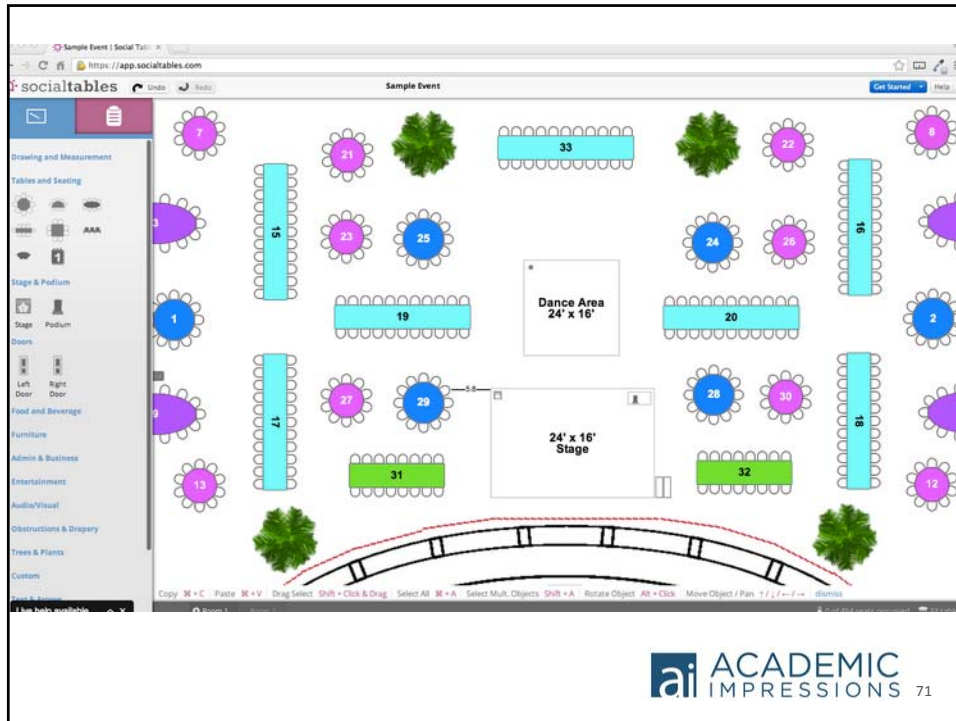
<http://www.checkineasy.com/>



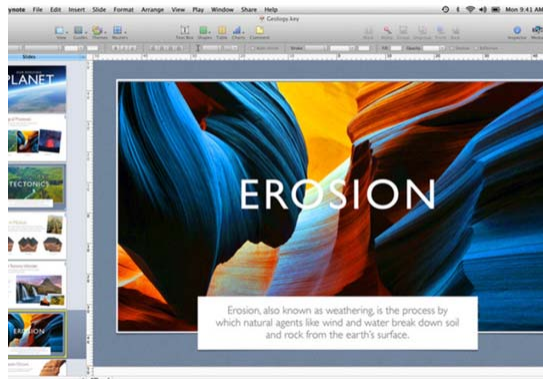
EVENT SEATING: SOCIALTABLES



Tools for Increasing Fundraising Effectiveness & Efficiency



EVENT MANAGEMENT: KEYNOTE



Show slideshow at event and control with your phone

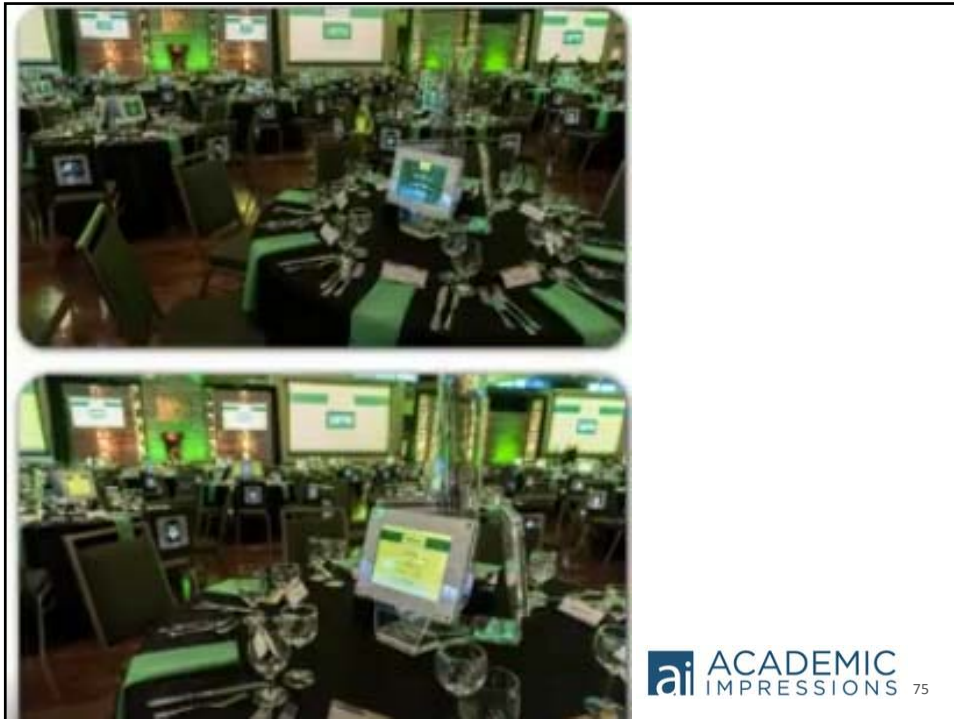


EVENT MANAGEMENT: KEYNOTE



Show slideshow at event and control with your phone



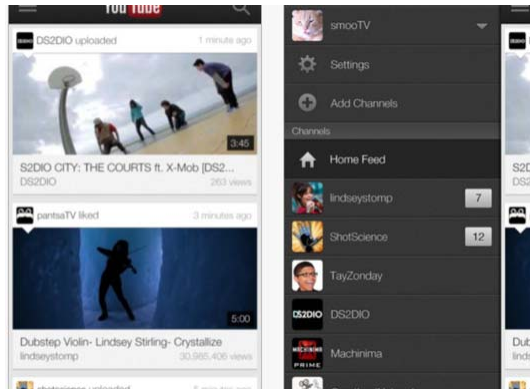


RESOURCE

Keynote

<https://www.keynote.com/>

**EVENT
MANAGEMENT:
YOUTUBE**



Live stream your event for free



CHAT

How have you creatively leveraged YouTube to engage donors?





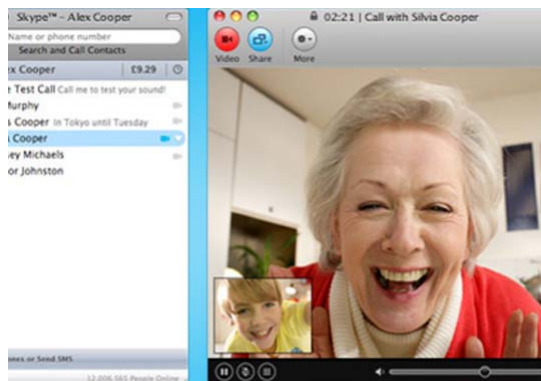
RESOURCE

YouTube

<https://www.youtube.com/>



EVENT MANAGEMENT: SKYPE



Have students join your event from campus





RESOURCE

Skype

<http://www.skype.com/en/>



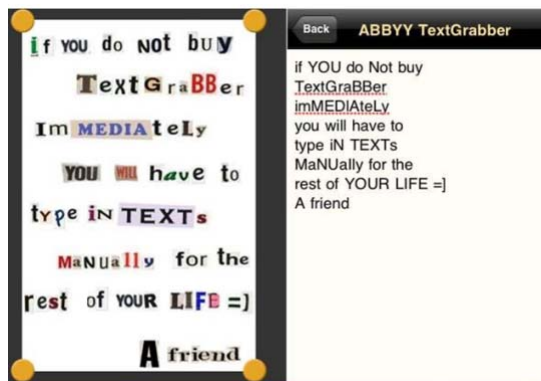
QUESTIONS

#Altraining

OPTIMIZING EVENT & VISIT FOLLOW-UP WITH APPS



CONTACT REPORT MANAGEMENT: TEXTGRABBER



Enter contact report
into your database





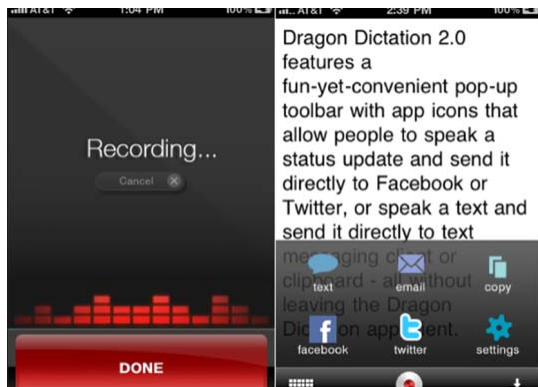
RESOURCE

TextGrabber

<http://www.abbyy.com/textgrabber/>



CONTACT REPORT MANAGEMENT: DRAGON DICTATION



Enter contact report
into your database

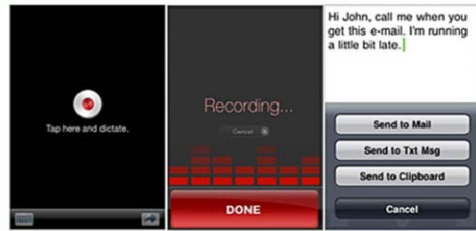


CONTACT REPORT MANAGEMENT: DRAGON DICTATION

Stop Typing, Start Dictating Emails on your iPhone

Nuance, the makers of Dragon NaturallySpeaking (the world's most popular voice recognition software), have released a new iPhone App that lets you dictate emails, blog posts, SMS text messages or any other text straight into your iPhone without having to use the keyboard.

Voice Recognition App for iPhone



Enter contact report into your database



RESOURCE

Dragon Dictation

<http://www.nuancemobilelife.com/apps/>

THANK YOU MANAGEMENT: THANKYOUPRO



- Send handwritten thank you to today's visits

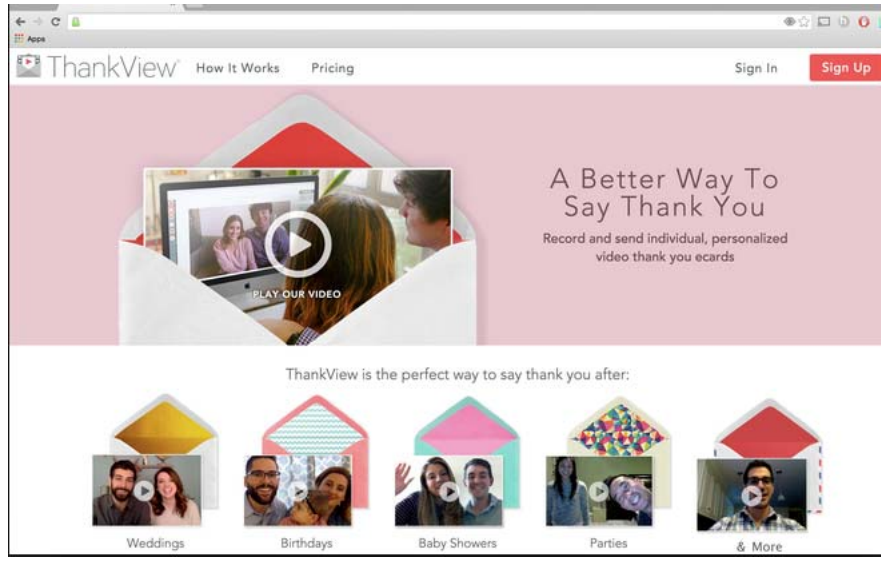


RESOURCE

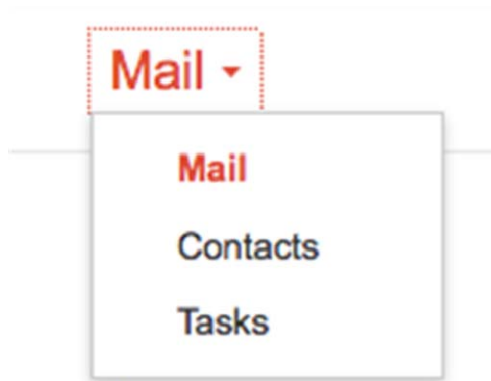
ThankYouPro

<http://www.thankyoupro.com/>

THANK VIEW

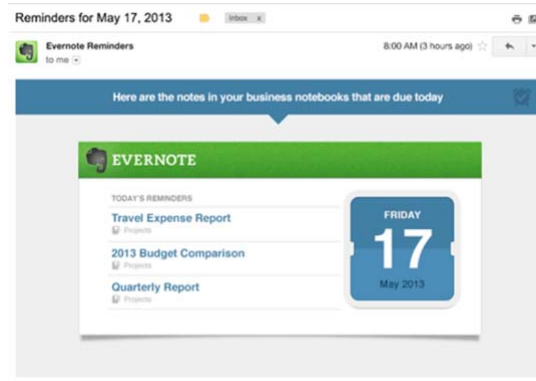


MISCELLANEOUS EVENT FOLLOW-UP: EVERNOTE



Set follow up tasks

MISCELLANEOUS EVENT FOLLOW-UP: EVERNOTE



Set follow up tasks



RESOURCE


Evernote

<https://evernote.com/>


TRAVEL FOLLOW-UP:
EXPENSIFY




Submit expense reports




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 RESOURCE


Expensify
<https://www.expensify.com/>



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 **CHAT**

What other digital tools have you found invaluable in your work as a fundraiser?



#Altraining

DATA SECURITY CONSIDERATIONS



DATA SECURITY

- Servers
- Remote identities
- Coordination with database
- Working with IT team
- Training

QUESTIONS



EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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