



“The Best of Core Operations From CRM to Analytics: Integrating and Supporting Your Global IT Infrastructure in the Cloud”

The 2.0 Nonprofit
Wednesday, June 4, 2008
Washington, DC



Is Technology The Silver Bullet?

There is always an easy solution to every human problem - neat, plausible, and wrong.

H.L. Mencken

A Nonprofit's Experience

- Background & context
- The Silver Bullet
- Driven by business priorities
- Cultural change
- It's about increasing user adoption

United Way in the U.S.

- In existence since 1887 in Denver
- 12.5 million individual donors
- Raised \$4 billion in '07
- 1300 local United Ways with 13,000 staff and 1 million volunteers
- Undergone a major transformation with our business model.

CRM Learning Circle Objectives

- Implement CRM at 11 local United Ways
- Develop and implement strategies, culture change tools, improved business processes, and CRM system templates and integrations
- Document learning to accelerate the implementation of CRM across the system-- saving time, money and effort for United Ways in future rollouts.

United Way Business Priorities Drives CRM Work

1. Constituent relationship & communication
(reducing churn)
2. Customer/constituent profiles
3. Major gifts planning & management
4. Customer service
5. Community impact relationships
6. Managing relationships across geographies

What “Constituent-Centricity” Looks Like...

We will know more about our constituents, such as where they live, where they work, what they care about, their interest in our agenda and their capacity, affinity and propensity to give to UWMA.

What We Will **KNOW**

These relevant products and communications will make our constituents feel recognized and appreciated, and in the case of organizations, like a partner of UWMA.

How They Will **FEEL**

**DONORS/VOLUNTEERS
COMPANIES • AGENCIES
OTHER NON-TRADITIONAL PARTNERS**

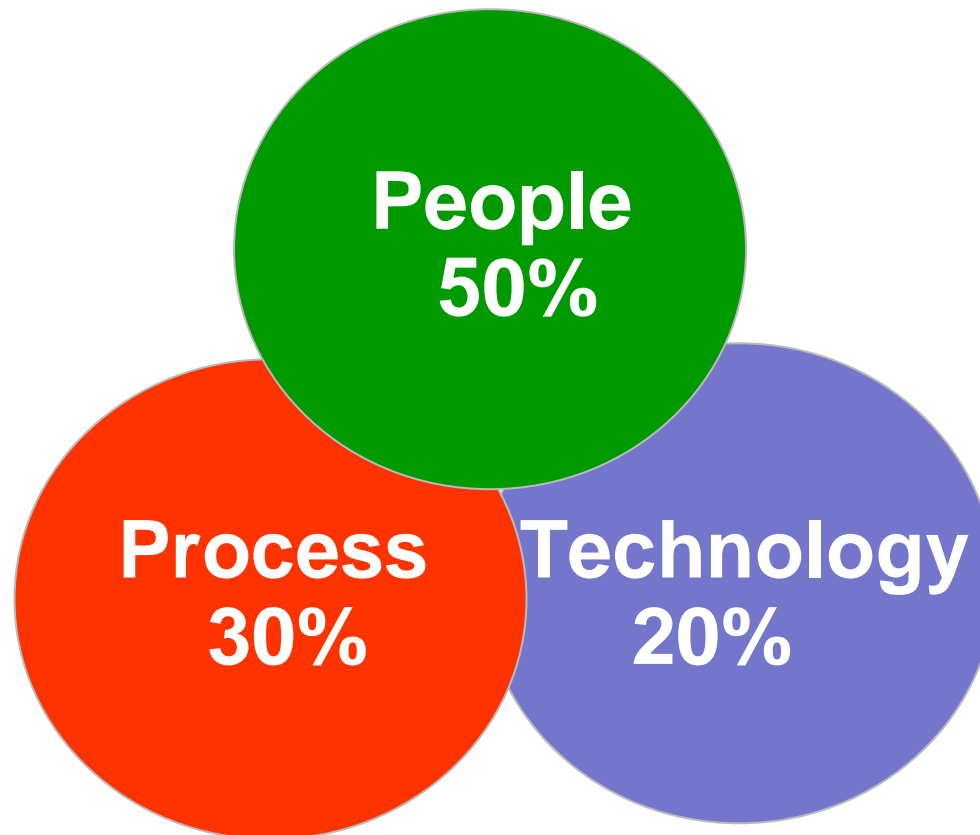
What They Will **DO** As a Result

Ultimately, our constituents will be more engaged and will do things like share more data, donate more financial gifts, offer more time towards volunteering and advocate for UWMA throughout their company and community.

What They Will **SEE** From Us

Based on new information captured and understood, UWMA will be able to provide programs, products and services that are relevant, and messaging that is timely, meaningful and motivating

A Critical Mix is Required to Successfully Implement CRM



Increasing User Adoption

- Connect the dots
- WIIFM
- Engagement and inclusion

United Way. Advancing the Common Good

Brand
Positioning

Brand
Promise

Creating the opportunities for a good life for all by focusing on:

Priority Impact
Areas

Education
Helping children & youth
achieve their potential

Income
Promoting financial
stability and independence

Health
Improving people's
health

Results to
Measure

- Readiness to achieve in school
- Academic achievement
- Productive & engaged youth

- Increased income
- Increased savings
- Assets gained and sustained

- Maternal health and infant well-being
- Basic health care coverage and prevention
- Healthy youth and adults

Strategic
Foundation

Community & Volunteer
Engagement

2-1-1

Community
Investment

Donor Relationships

Public Policy

Partnerships

Inclusion

Resource Generation

Standards of Excellence

ADVANCING THE COMMON GOOD

EDUCATION	INCOME	HEALTH
GIVE	ADVOCATE	VOLUNTEER
ASK	THANK	INFORM

LIVE UNITED™



WIIFM

The 3x Factor:

For every piece of data that your staff puts into the CRM system, they must get 3 pieces of useful information in return.

Bart Goldenberg, President, ISM

Inclusion & Engagement

Selecting CRM System

- Taskforce of executives
- Super Users Group that was cross-functional and representative

Collecting & prioritizing business needs

- Multiple opportunities to learn more & get engaged
- Face-to-face meetings, webinars, online surveys, interviews, etc.



Thank You!