**Development Operations:
Using A CRM/Database to Supercharge
Our Fundraising Efforts**

Technology Culture Management
Development Ops: Supercharge Fundraising

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Fraternal Experience:

CFO - Beta Theta Pi
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"Technology can accelerate a transformation but technology cannot cause a transformation.

Jim Collins, *Good to Great*

I have 4

White

Yellow &
Orange

Pink/Purple

Red

Brown

But...
the babysitter never makes them clean.

## (or takes the buckets home.)

Technology Culture

Partner Support

- Great partners put your success first
- Great partners empower staff to achieve results
- Great partners understand your strategic goals and support your staff/volunteer efforts to achieve them.
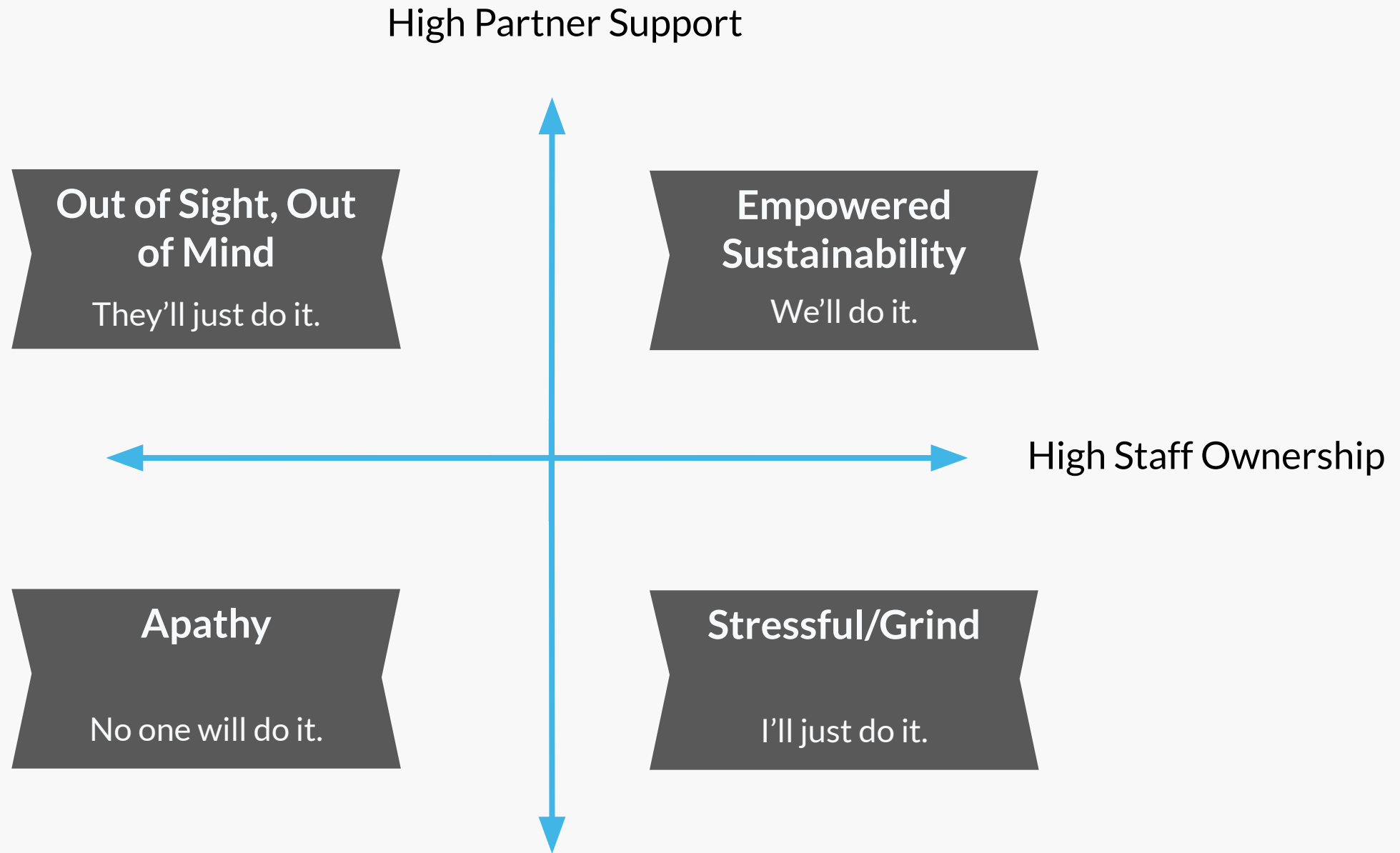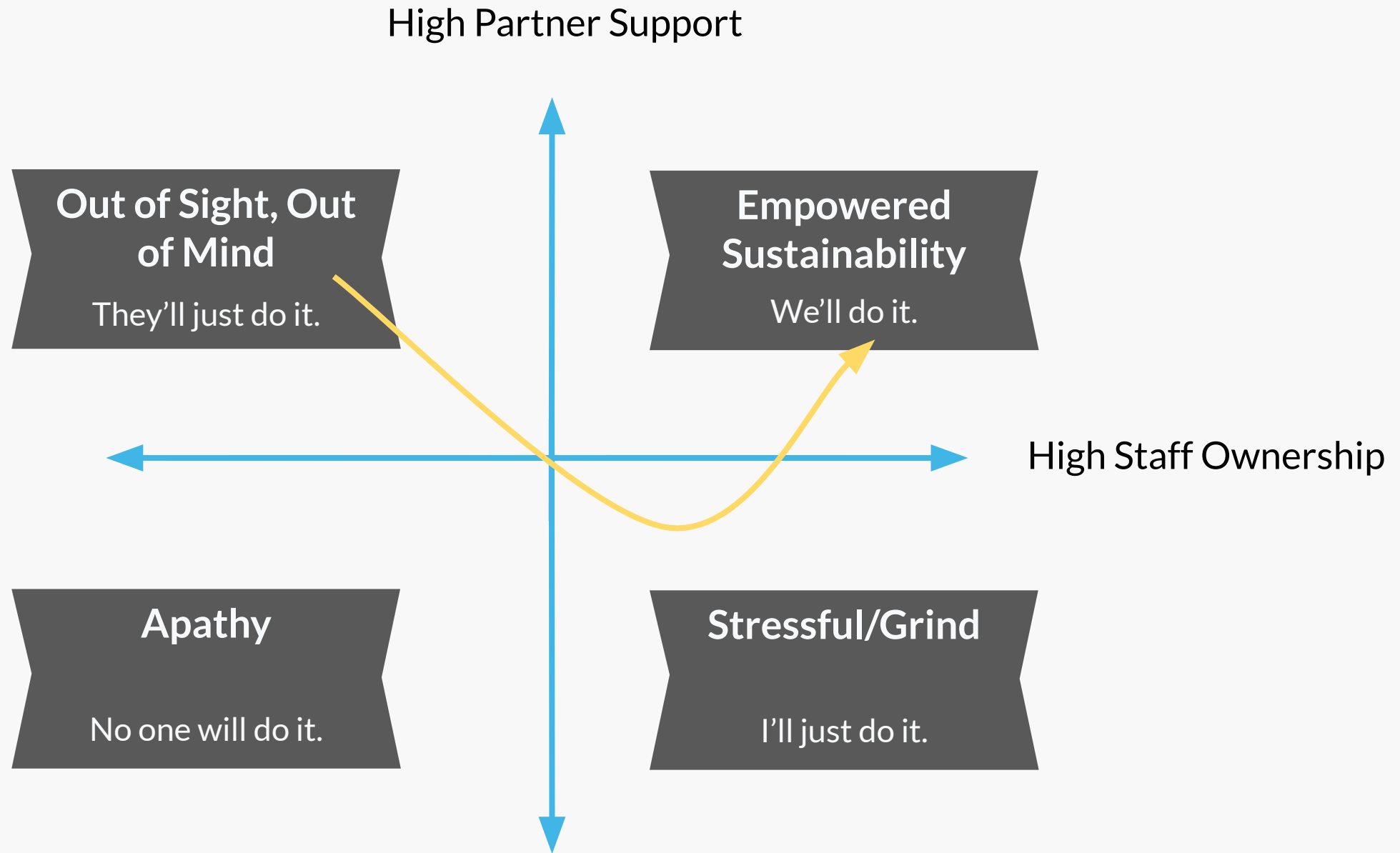
Staff Ownership

- Own the data, when the data comes out, it's yours!
- Own the processes and means to accomplishing goals.
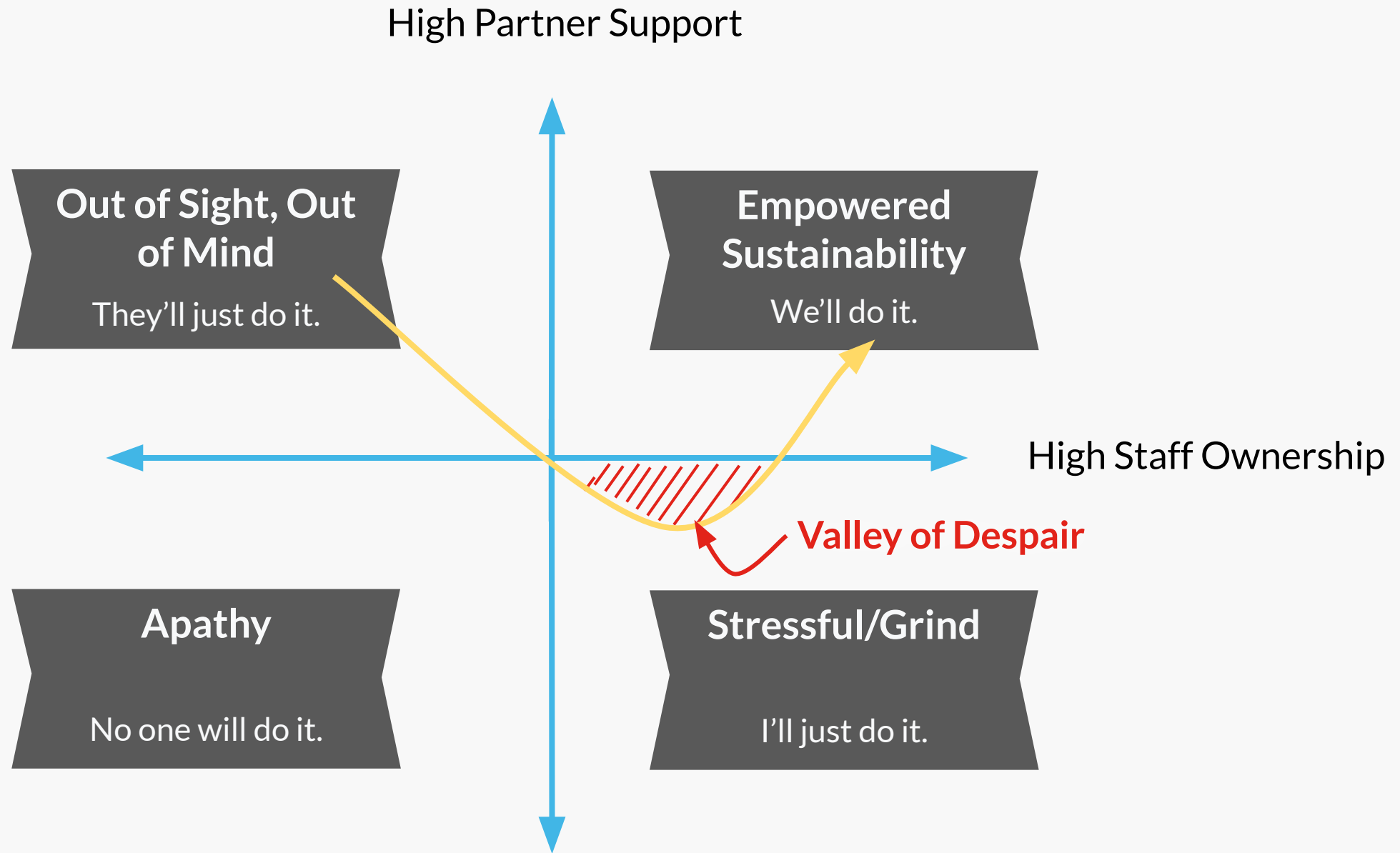- Own each step of the process, even if a vendor performs some of the steps.

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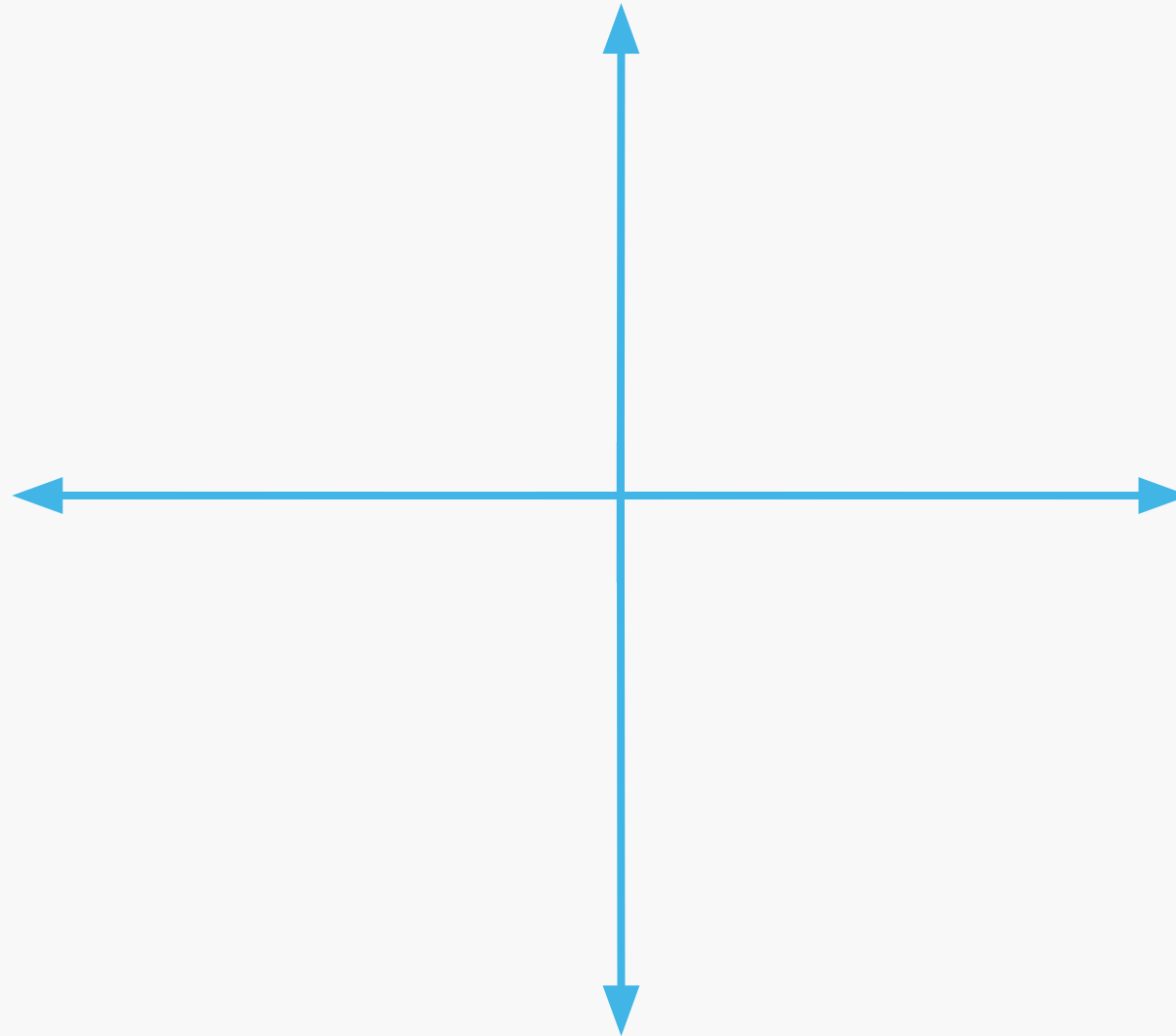
Plot your arrows

- Where are you?
- Where is your team?
- Where is your organization?
- Where is your current project?
- Where is the last project?
- Where is your organization relative to one or all of the cygnus points we heard earlier?
- Where is _____?

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What Is One Thing You Can Do in the Next 7 Days?

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Philosophies of Technology Culture

What cultural traits do we need to lead our staff to adopt so technology can be a tool that accelerates our transformation?
- Create a culture of clean data
- Model the way
- Run every process inside the database
- Extreme Ownership

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> *My biggest entrepreneurial mindset shift in [the last year]:*
> *(old) How do we get this done?*
> *(new) How do we build a system/process to get this done?*
> *And track our adherence to the process, not just the end results.*

- Allen Burt

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Create a Culture of Clean Data

- Single Source of Truth. Salesforce will hold everything, and it will be correct. No longer will system data not match and no longer will data be found outside of the database.
- Everything has a spot and a spot for everything. All data will have a specific location for it to go and for it to be reported on. If we don't have a spot for your data, see habit two…
- Ask/research first! Never just enter data because you need to save it or because you don't know where else it should go. Enter it in the correct way.
- Ensure the data matches, regularly. If there are two systems, push for them to match — and utilize the single source of truth!
- Don't create test data in production!

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Model the Way

- Ask if the data you receive came from the database. If it didn't, ask them to work with the team to get it into the database.
- Any time someone sends you a spreadsheet, ask if they can send you a link to the report in your database.
- If there's an important email or call from a major award winner or donor or chapter volunteer, log it in the database.
- If someone mentions an email they received, ask if they logged the email in the database.
- If someone mentions a story, log in, and look in Salesforce to see if it tells the same story; if not, ask why.
- Learn reporting and dashboards, ask each of your direct reports to help you with a report.

Run every process through the database

- Your database has the power to help your team move faster and do the work they're doing outside of the system.
- Utilize the database as another employee — the technology is doing the work your employees used to do but now is automated.
- Expand your staff footprint by finding things they're doing that can be performed by your technology!
- If a process and data are not in the database, you can't measure it. You can't engage your members with it. Push all processes into your single source of truth.
- If someone is repeatedly working in a spreadsheet to provide information on a regular basis, including annually, push to automate those processes inside the database.

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Extreme Ownership

- Who is responsible for the addresses in the system?
- Who is responsible for the donation being earmarked for the right restricted fund?
- Who is responsible for ensuring a member's status and graduation date is accurate?
- Take the blame. Every time you do, the team steps up and starts to engage and do the things.
- We cannot rely on the technology to ensure the data tells the right story. Humans tell stories and input data to help do so, therefore the humans must know if the data is telling the right story.
- If you need encouragement in this area, google "Jocko Willink" and watch a few videos, like this one.

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"*New goals don't deliver new results. New lifestyles do.*

And a lifestyle is a process, not an outcome.

For this reason, all of your energy should go into building better habits, not chasing better results."

- James Clear, author of *Atomic Habits*

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Session 2

Quiz & Discussion

- Time for a quiz!
- 10 minutes to take it
- 20 minutes discussing it
  - Can you be right or wrong?
  - Why did you answer the way you did?
  - Did anybody's explanation make you change your mind? Why?

Discussion Questions

- How can the Cygnus Survey results impact how we approach our technology and data?
- How should we prioritize our efforts between operational improvements and development strategies/targets?
- How should we view our technology and data?
- How and why should I drive a technology-centric approach across my organization?

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Session 3

Translating Data

We can find success when…

> *"There are a lot of universities that have better data on individual records — but very few can segment and determine strategy from what they have — essentially you don't have as much data, but you know how to use your data and system to get actionable and strategic decisions.*"

So what does this actually mean? What on-demand data closes the gap?

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Engagement Summary

Show the Data to the Donor!

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What Do We Mean by Translate?

Translated Data

Engagement Summary

Count of All Org Roles	0	Count of Contact Awards	0
Count of Current Org Roles	0	Order of Pearl Award Date	

- Send a year-end impact stewardship letter:
  - Original Opening:
    - Dear Joe,
    - Thank you for your generosity to the Beta Theta Pi Foundation in 2021. As the Fraternity implements a bold new strategic plan, you are providing the crucial resources needed to reach Betas in every chapter through the programs, scholarships and learning community projects that will help them graduate ready to change the world.

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Translated Data

- Send a year end impact stewardship letter:
  - Possible personalization:
    - Dear Joe,
    - Thank you for your generosity to the Beta Theta Pi Foundation in 2021**[, in both time and treasure]**. As the Fraternity implements a bold new strategic plan, you are providing the crucial resources needed to reach Betas in every chapter through the programs, scholarships and learning community projects that will help them graduate ready to change the world.

Translated Data

Engagement Summary

Count of All Org Roles	0	Count of Contact Awards	0
Count of Current Org Roles	0	Order of Pearl Award Date	

- Send a year end impact stewardship letter:
  - Possible personalization:
    - Dear Joe,
    - **[As a Beta award winner, t]OR[T]**hank you for your generosity to the Beta Theta Pi Foundation in 2021. As the Fraternity implements a bold new strategic plan, you are providing the crucial resources needed to reach Betas in every chapter through the programs, scholarships and learning community projects that will help them graduate ready to change the world.

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Translated Data

Engagement Summary

Count of All Org Roles	0	Count of Contact Awards	0
Count of Current Org Roles	0	Order of Pearl Award Date	

- Send a year end impact stewardship letter:
  - Possible personalization:
    - Dear Joe,
    - **[As a leader and award winner, t]**hank you for your generosity to the Beta Theta Pi Foundation in 2021. As the Fraternity implements a bold new strategic plan, you are providing the crucial resources needed to reach Betas in every chapter through the programs, scholarships and learning community projects that will help them graduate ready to change the world.

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Translated Data

	A	B	C	D	E	F
1	Name	Count of All Org Role	Count of Current Org Role	Count of Contact Award	Opening Insert	End Sentence One Insert
2	Joe Budde	1	0	0	As a long time volunteer,	
3	Sarah Smith	0	1	0	T	, in both time and treasure
4	Rob Smith	0	1	1	As a Beta award winner, t	, in both time and treasure
5	Natalie Smith	0	1	0	T	, in both time and treasure
6						

```
=if(AND(B2=1,C2=0,D2=0),"As a long time volunteer,",
if(D2=1,"As a Beta award winner, t","T"))
```

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Reflection Questions

- What opportunities do you have to show the data to your donors?
- What opportunities do you have to translate the data?
- What data are you already reporting that you could use?
- What data points could you add to your personalization tool belt?

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Extra Reflection Questions

- What do you do most often in the database currently? What takes the most time to report on?
- What process is so cumbersome?
- What efforts move you closer to your goals?
- How do you know who to call next for an annual fund gift? How do you know who to call next, period (major gifts)?
- How do you know who is next to be added to a development officer's portfolio?

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Thank you!

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