

# Fundraising CRM discovery session - feedback

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# Agenda

- Introduction
- What is a CRM
- Your views
- Findings
- Proposals
- Feedback
- Next steps



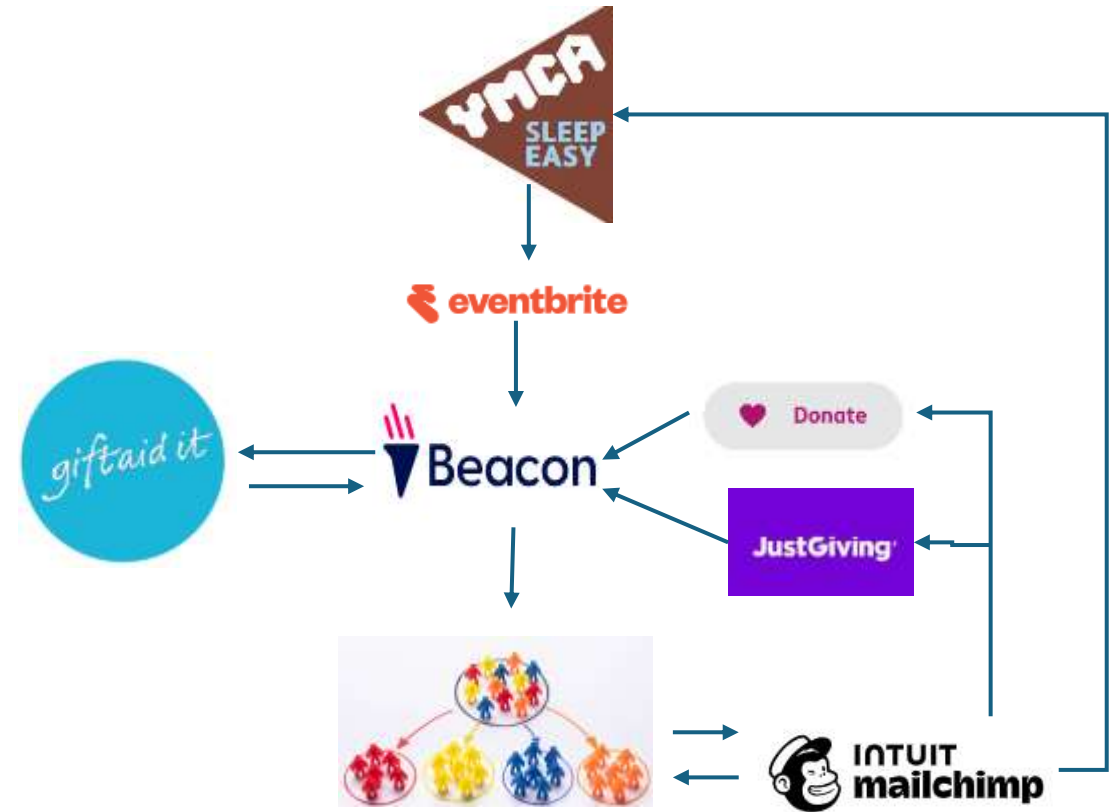
As part of the work to see how YMCA England and Wales can support local YMCA, a workshop was run in August.

- Twenty attendees from 13 YMCA's
- Discussion on:
  - What CRM systems are used
  - Challenges people are having
  - What support with Fundraising CRM would be helpful

Overall, good engagement and positive feedback from attendees

# What is a Fundraising CRM

- Contact management
- Marketing automation
- Major Gifts management
- Events management
- Donation tools
- Gift Aid processing
- Reporting



In groups of four, for the next ten minutes, can you talk about:

- Where is your supporters' data stored
- Whether you feel your YMCA see's data as an asset
- Then either
  - If you have a CRM, what challenges are you having\*
  - Or if you haven't got one, why you haven't and whether you think having one would help.

\*Keen not just to hear about technical issues but other problems, for example, lack of training, ownership, buy-in, data silo, etc



# The Findings

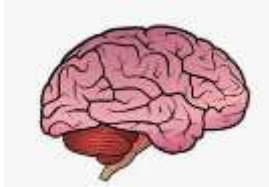
# All at different stages of journey

Evident that there are very different levels of knowledge and experience of CRM across YMCA's



# What CRM do you use

No System



Some Lists



A CRM

Donations Coordinator v7



Working CRM



Of those with CRM, two-thirds felt it wasn't set up for Fundraising or wasn't being used well

## What challenges do you face with CRM or fundraising data?

- Organisation not understanding the need/benefit of CRM
- Importance of data not understood by wider org
  - Not collecting data or keeping it
  - The data is not in one place
- Capacity and skill to set up and manage CRM
  - Fundraisers are often given the job of managing CRM along with their day job
  - The system can be quite complex to set up and use
  - Working out how CRM works is time-consuming

# Other Points Raised

- Varying degrees of digital literacy
  - Many people work on paper
  - Would need to take people on a journey to get them onboard with CRM
- Have CRM but
  - It is not easy to use
  - Not set up to support Fundraising needs
- Want to grow community fundraising, but are limited by the
  - Ability to capture donations online (and feed into CRM)
  - Ability to segment supporters
  - Ability to send bulk emails (newsletter, Invites etc)
  - Ability to capture event sign-ups

# Support Wanted

- Would like to have others we can reach out to for help
  - Selling the benefits of CRM to leadership
  - Selecting CRM
  - Configuring the CRM
  - Group to be able to talk through challenges/issues
- Some interest in a “preferred” CRM if it
  - Could allow cost savings in licence costs
  - Could make support more useful
  - But recognition that every YMCA is different so it may not be practical

# Pause



- Create a CRM user group on YHUB
  - With potential subgroups for the more popular CRM used.
- Form a working group to
  - Produce materials for YMCA at different stages
    - **Starting out** – Examples: What is CRM, Writing a Business Case, Selecting CRM, Implementing CRM, Data Migration etc
    - **Mastering Basics** – Examples: Reporting, Gift Aid, setting up webforms, managing Prospect & Opportunities etc
    - **Advance** – Segmentation, task automation etc
  - Explore whether a preferred CRM<sub>(s)</sub> could work for YMCA's

# Working Group

- Made up of four or five representatives from across YMCA's
- Aim to meet quarterly to
  - To set up a process to capture wider YMCA needs around CRM and Data
  - To develop a plan for support materials needed
  - To lead the development of support materials
  - To run ad hoc session on areas of interest
- Let me know if you'd be interested in being involved?

# Your thoughts

In groups of four can you discuss for the next five minutes the following:

- Do you think the proposals make sense
- Is there anything you would add or remove
- Do you think the proposals could help
  - Your YMCA
  - Other YMCA's



# Questions & Next Steps