

Non-Profit Database Management

*Are you getting the most out of your systems so you
can focus on developing your organization?*



Non-Profit Database Management

Workflow
Pain Points
Stewardship
System



What Is Your Workflow?

1. What steps do you follow to acquire and retain donors?
2. What steps do you follow to onboard and serve clients?
3. How do you report on your organization and share the impact of your work?



What Are Your Pain Points?

- At the staff level – who is struggling with inefficient processes? What are they?
- At the task level – what functions regularly fall through the cracks or are chokepoints?
- Is data input consistent? Is data quality reliable?



Is Your Stewardship Outreach Effective?

1. Do you have a stewardship document that defines the process and timelines? Can it be automated?
2. Can you quickly thank, report on and appeal to key donor groups?
3. Does staff know their roles? Are they completing tasks on time?



How to Capture Information?

Create or customize fields, processes, reports, tasks and ways of categorizing your constituency

Record/measure unique aspects of your organization vs. information common to all non-profits

Inform and train staff



Database Considerations

1. Cost and complexity
2. Amount of customization needed
3. Integrations with other systems
4. Type of information to be captured
5. Multiple systems blended into one



What Is The Best System For You?

Little Green Light

Donor Perfect

Salesforce

Quick Base



Do You Need Help?

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