



Part 4: Staff Adoption

A Critical Component to Maximizing Effectiveness of Your Nonprofit Database

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So you get this fabulous new cell phone. It has been touted as the must have item of the year. It has all these great apps that sound really useful. You buy the phone, but it is so difficult to figure out that you can't even make a simple phone call. You end up with nothing more than a very expensive paperweight. It can be that way with your nonprofit's database too. It has all of these wonderful features, but it is so difficult to figure out that nobody in your office wants to use it. That makes it a very expensive empty database.

When your nonprofit is ready to evaluate donor management software, get all potential users involved at the beginning - even before you start looking for a new database. Make a checklist of important features for all users and prioritize them as must haves, nice to haves, or not necessary. Involve all future users in the process. This will help you win their support and their buy-in. Make sure to share your goals for your new database with your entire staff and with the software vendors too.



Goals can and should include:

- ✓ Increasing staff productivity - list those tedious tasks you want to automate
- ✓ Raising more money for your mission - what are your fundraising goals from individuals, corporate sponsors, foundations
- ✓ Improving operational efficiencies - what workflow best fits your organization
- ✓ Enhancing communication with internal resources, your community and your supporters - how often and what type of outreach programs

Schedule personal, online, one-on-one demos with your short list of fundraising software vendors. Invite all potential users to view the demo(s) and make sure everyone has an opportunity to ask questions.

Here are some important things to look for and to consider. First, remember that data entry is a tedious but an unavoidable chore. Your donor database should allow for easy and straightforward data entry.

The user should not have to have a degree in computer engineering in order to enter a new constituent and their donations. Screens that are intuitive make using the database less intimidating. Being able to segregate your constituents into user-named groups instead of by numeric codes will make it easier too. Your staff will be willing to make better use of software that is straightforward. Plus, you should be able to have volunteers and even board members access your database which means it has to be easy even for those occasional users. This includes having easy-to-follow guides throughout the software with step-by-step instructions, access to online user documentation and even context sensitive help.



Secondly, know that keeping the data within your database clean and up-to-date may not be very high on your staff's priority list with everything else that they need to accomplish in a day. Therefore, it is important that someone take on the task of database "cheerleader" and tout the importance of data integrity. Staying on top of the data entry and data clean up will make everyone's job easier. It makes for more efficient reporting, mailings, and even phone contacts. Your new donor database should also have easy-to-use tools for indentifying and then merging duplicate records.

A third tip is to remember that while having accurate and up-to-date information at your fingertips is critical, running reports can be very tedious. Make sure that your staff is using all the tools at their disposable to make reporting quick and painless. Think about the many reports you generate and/or review every month. Your database should contain tools that allow you to quickly and easily produce status reports, look at trends, and do comparisons. Your staff should not have to "reinvent the wheel" every time you want a report. Write the queries for your ad hoc reports one time and save them so you can go back and use them again and again by applying new filters (like new date ranges). Always use an existing query as a starting point for creating new queries.

Number four on the list is to make your database accessible to your users from the office, their homes or even from the field. Accessibility is critical to buy-in. If the database can be remotely accessed then that allows for more flexibility for the user.

A fifth consideration is to make your nonprofit's database "one stop shopping." Your organization should not have to manage several databases. It can be extremely frustrating trying to keep your data in sync between many different sources. Take that pain away. A single database can manage your fundraising, your programs and all constituents that interact with your organization. If you do need to share data with third parties, make sure that your database has easy import and export tools so it only takes a few minutes to send data to your accounting software.

Lastly, proper training on your donor management software and all the tools your database provides is key to maximizing staff buy-in. Have all users participate in an initial instructor led training course. Break this training into manageable time periods. Users won't retain a lot of information if training sessions are too long. Make sure all users have easy access to a comprehensive user's manual. Find a software vendor that encourages your users to contact their helpdesk at any time with "how to"

questions. Also make sure your vendor provides your users with unlimited access to a library of training videos. Frequent upgrades of your database tools are great for keeping current with new trends in fundraising and taking advantage of new technologies, but they can be very frustrating for your users because they introduce change. To help alleviate the stress of change, make sure you have access to detailed release notes each time your database is upgraded. Bring all users together to walk through the release notes and to practice with new changes. Free training videos and/or free training webinars from your database vendor will go a long way too in making users more comfortable with major upgrades.

If your database is intuitive, easy-to-use, and makes you and your staff feel like you're using your time efficiently, then it is likely that your database will be used to its fullest potential. This will free up your time to focus on your mission, for prospect outreach and for donor retention.



Please look for the fifth article in our series, *Database Management for Nonprofits*, which will be available for download at www.towercare.com in May 2010. If you are in the market for fundraising and donor management software, check out DonorPro. DonorPro is affordable, easy-to-use, and comes highly recommended by nonprofits worldwide. Call us toll free at 866-935-8281 or visit us online at www.towercare.com/content/product-tours. Thank you!