

CRM and Customer Data

10 October 2023



The emerging technology options helping drive digital fundraising and marketing

Today's programme



- 14:00 **Introductions. Heightened ambitions - dashed hopes**
Welcome - introductions and a background to the session for the afternoon.
- 14:10 **Overview of the technology driving and supporting digital fundraising**
Mark Luckins & Gary Seaman, Adapta Consulting – AND QUESTIONS AS WE GO ALONG!
- 14.40 **Q&A**
A deeper dive into all things customer data technology
- 15.10 **Summary and close**



Making Digital Real

- We are a **specialist** information systems consultancy
- We only work with **charities**, associations, trusts and others in the not-for-profit sector
- We are completely **supplier-independent**
- Our consultants have held **senior** positions in a broad range of different organisations
- Our advice and guidance is based on **practical experience** gained over many years

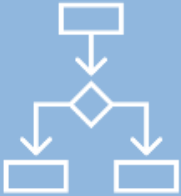
Depth and breadth



Digital, Data & Technology Strategies



Reviews & Health Checks



Business Processes & System Requirements



Supplier & Solution Selection



Interim Technical Leadership



Programme & Project Management



Risk, Compliance, Data Protection & Security



Governance & Business Cases



Change & Organisational Development

Our Mission and Purpose

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We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

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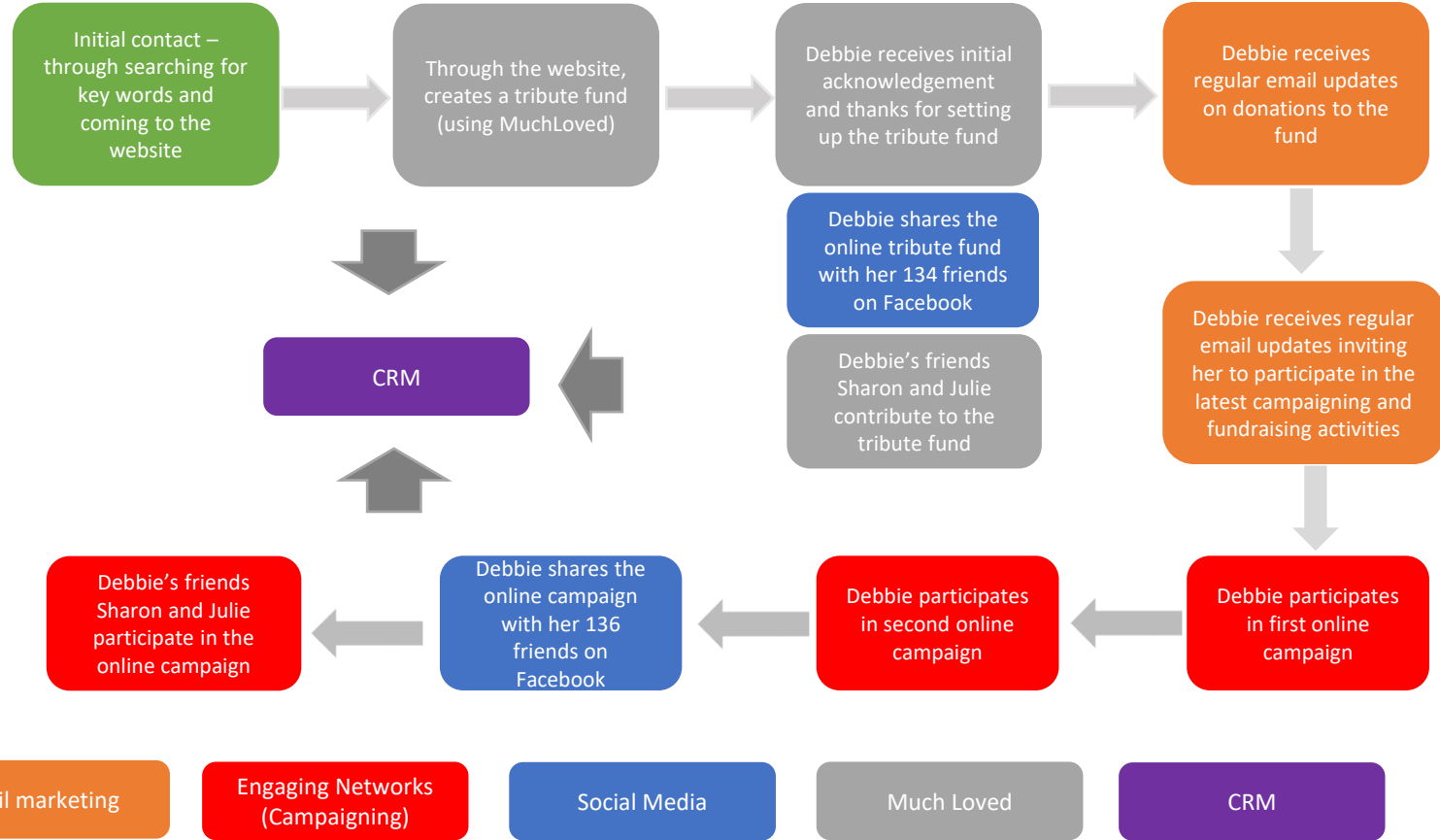
Think about things from
your customer's (**donor's,**
supporter's, fundraiser's)
perspective...

Supporter Persona

Who: Debbie, age 34, Bristol, 2 young children, environmentally aware, active on Facebook and Instagram

Why: Lost grandmother to ...

What they want from CHARITY X: To help remember her grandmother, get involved in campaigns, and to support the cause through donations and other fundraising opportunities.



What does their journey with you look like?

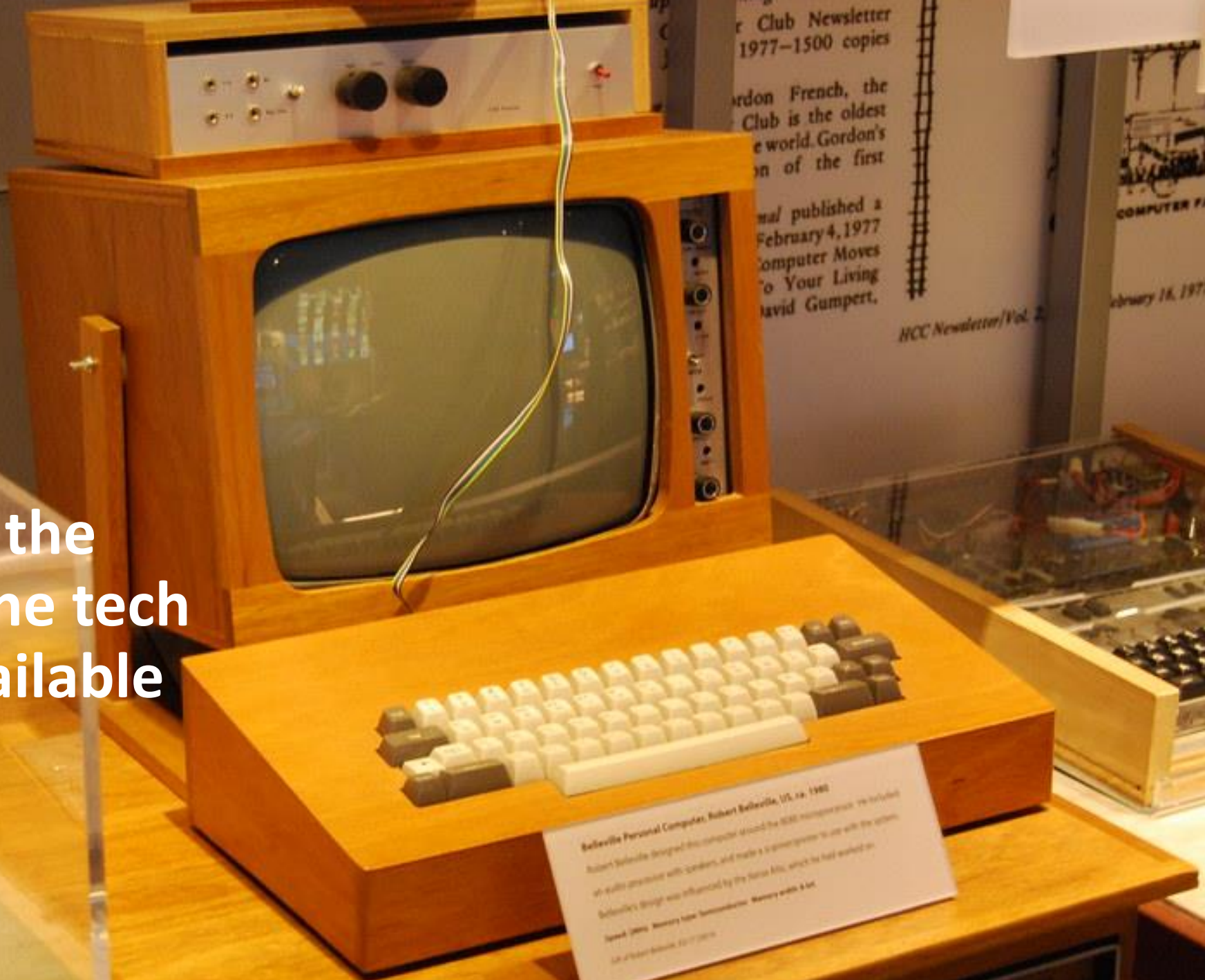


They are creating lots and lots and lots of data, in lots and lots of different (digital) places!



A futuristic vision of seamless digital engagement with our supporters and fundraisers..

Dashed by the
reality of the tech
we had available



Belleville Personal Computer, Robert Belleville, UT, ca. 1980
Robert Belleville designed this computer around the 6500 microprocessor. It included an audio processor with speakers, and made a unique printer to use with the system. Belleville's design was influenced by the Texas A&M, which he had worked on.
Texas A&M. Memory base. Transmembrane. Memory with 8 bit.
UT at Robert Belleville, 2017. 2018

Club Newsletter
1977-1500 copies
Gordon French, the
Club is the oldest
in the world. Gordon's
son of the first
published a
February 4, 1977
Computer Moves
to Your Living
David Gumpert,
HCC Newsletter/Vol. 2

COMPUTER FAIRE
February 18, 1977

A black signpost stands against a vibrant sunset sky. The signpost has two directional signs. The sign on the left is a black arrow pointing left, with the word "PAST" written in large, bold, white, sans-serif capital letters. The sign on the right is a black arrow pointing right, with the word "FUTURE" written in large, bold, white, sans-serif capital letters. The sun is low on the horizon, creating a bright glow and casting long shadows. The sky is filled with soft, golden light and some wispy clouds near the horizon.

PAST

FUTURE

Anyone heard of a....CDP?

What are the key differences between a CRM, and a CDP?



CRM

Begins with the sales process, application process, or similar (depends on organization).

Pulls data from a CDP.

Not a complete picture of the individual (not designed to be); as an example, not designed to store most marketing data.

Marketing typically plays a role, as do other teams, but usually owned by sales.

COMMON INTEGRATIONS:

CDP, marketing automation, enhancements to the CRM (example: apps on the Salesforce AppExchange), email outreach systems, sales enablement systems, BI tools.

CDP

Underpins the entire customer journey — its core is the data rather than a team or department process.

Stores anything and everything about your customer.

Unifies user data from many sources (like campaign metrics, behavior on websites, profile information, purchases, an customer services data), including data from a CRM.

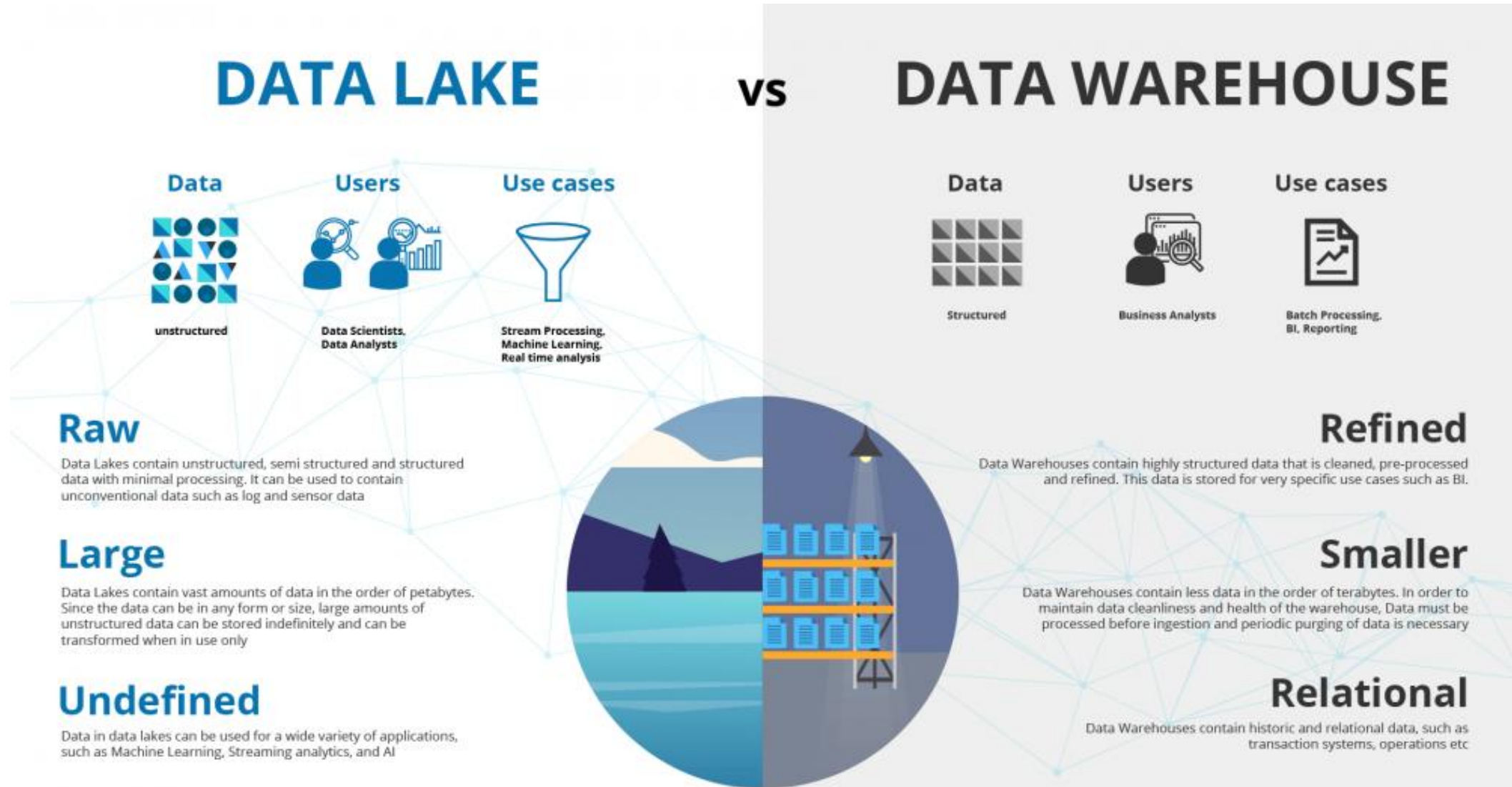
Usually owned by marketing or IT.

COMMON INTEGRATIONS:

CRM, marketing automation, customer service tools, BI, personalization tools, databases of many different kinds.



What are the key differences between a data lake and a data warehouse?



Market overview of CDPs



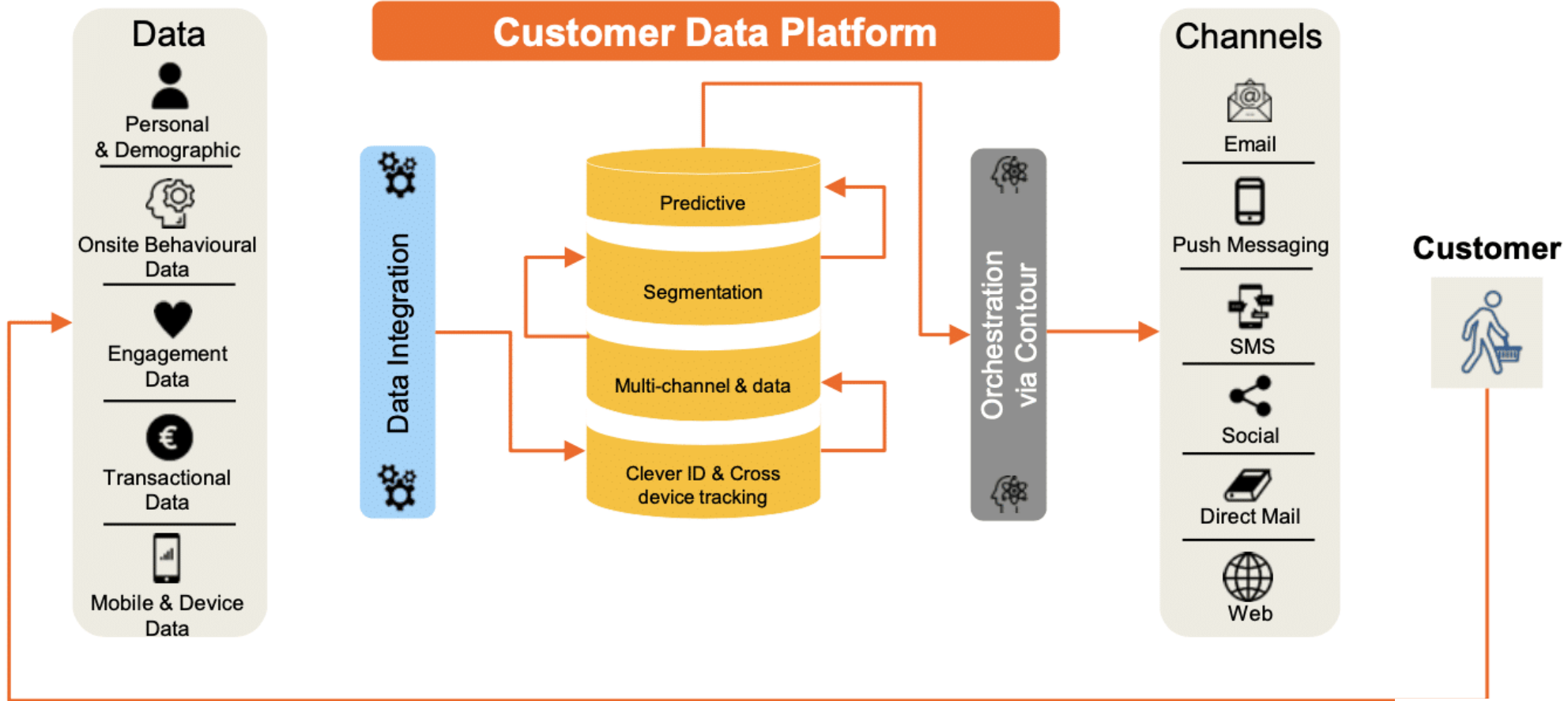
Adobe
Real-Time
CDP



TREASURE
DATA



MS Dynamics Customer
Insights

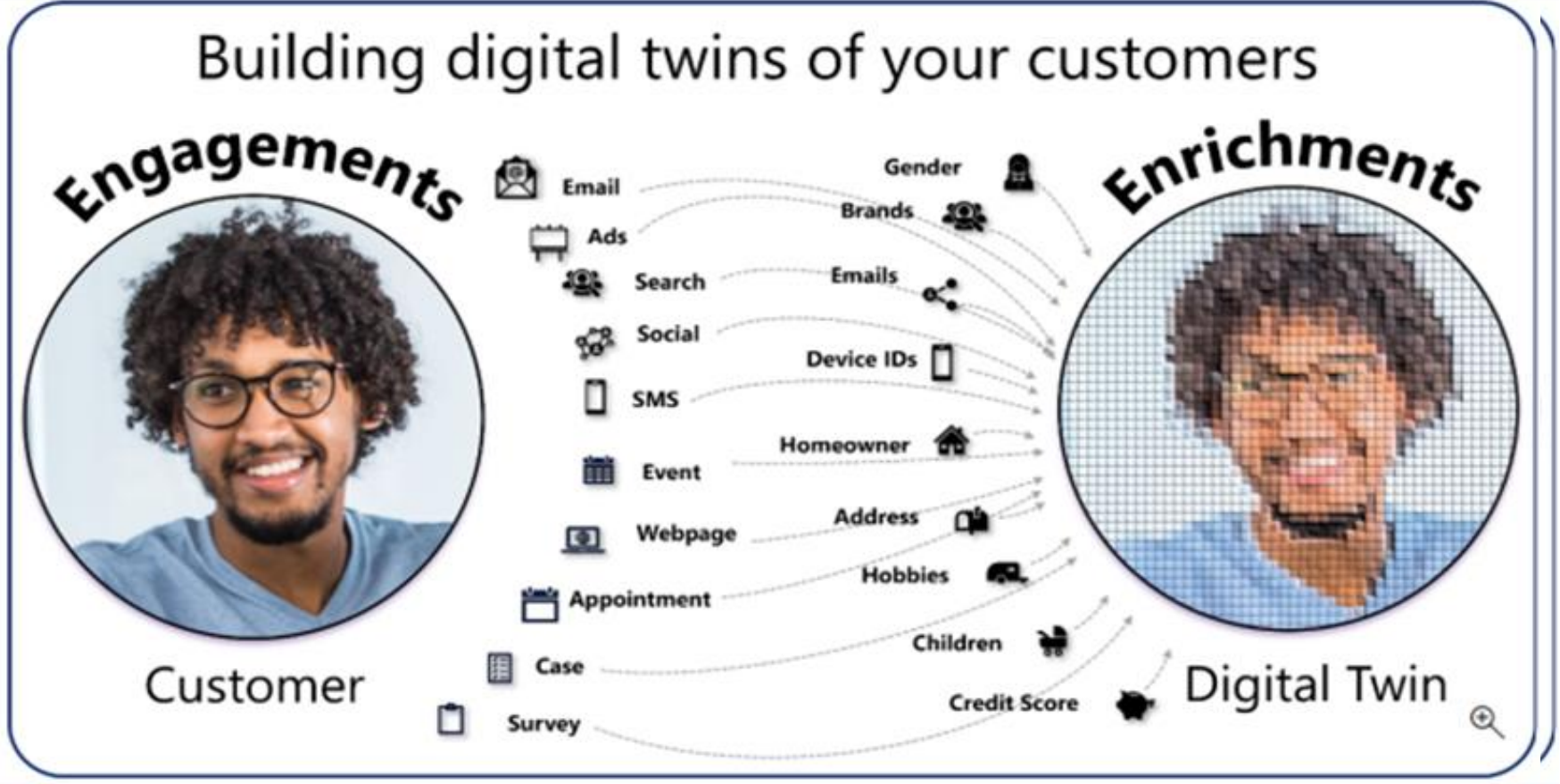


Segment
CDP



Lytics CDP

What does a 360 supporter view look like?



And what can it do?



How can I use this?

More confidence
in automation

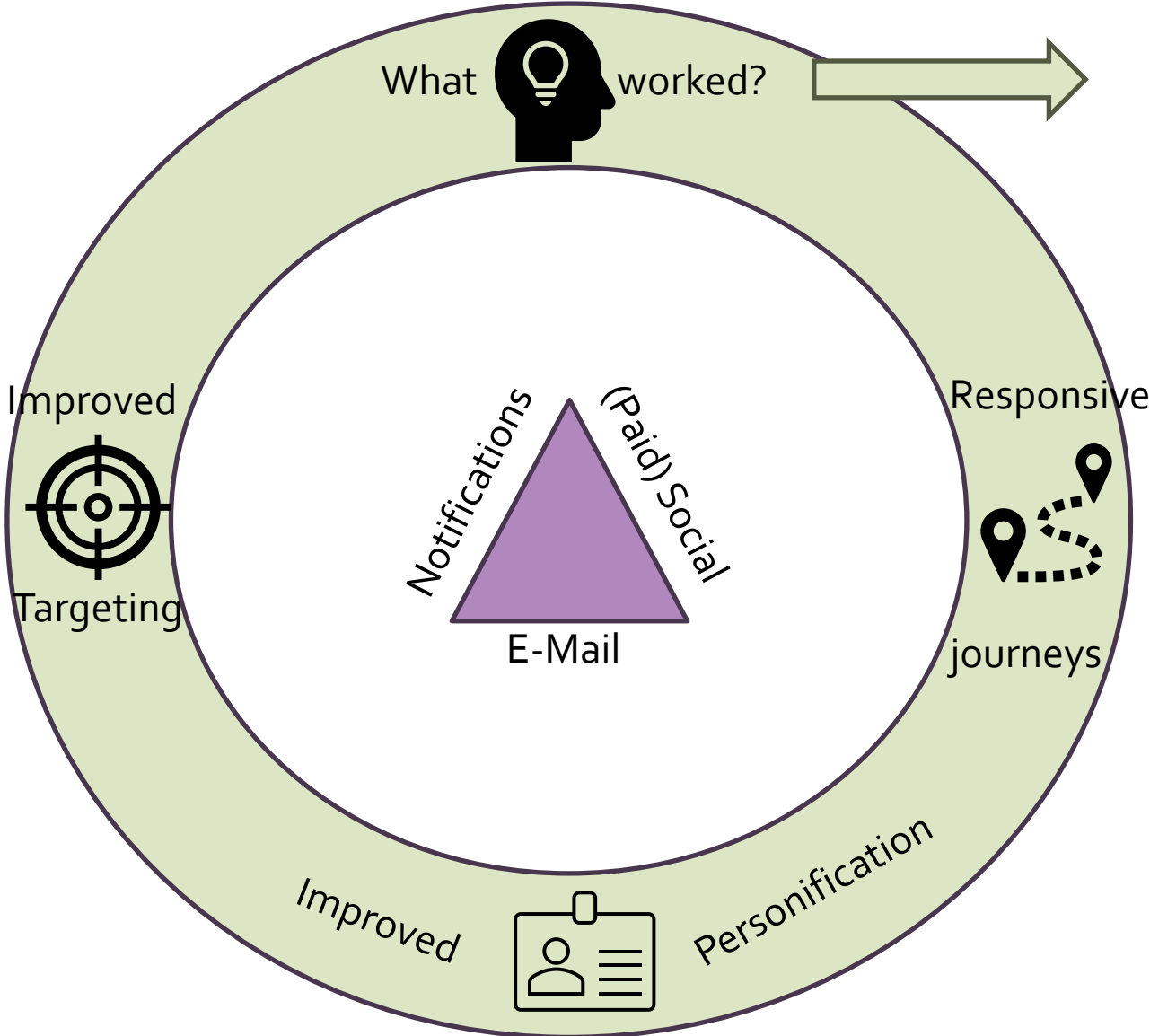
Who might be interested in our organisation?

Who might be willing to give for the first time?

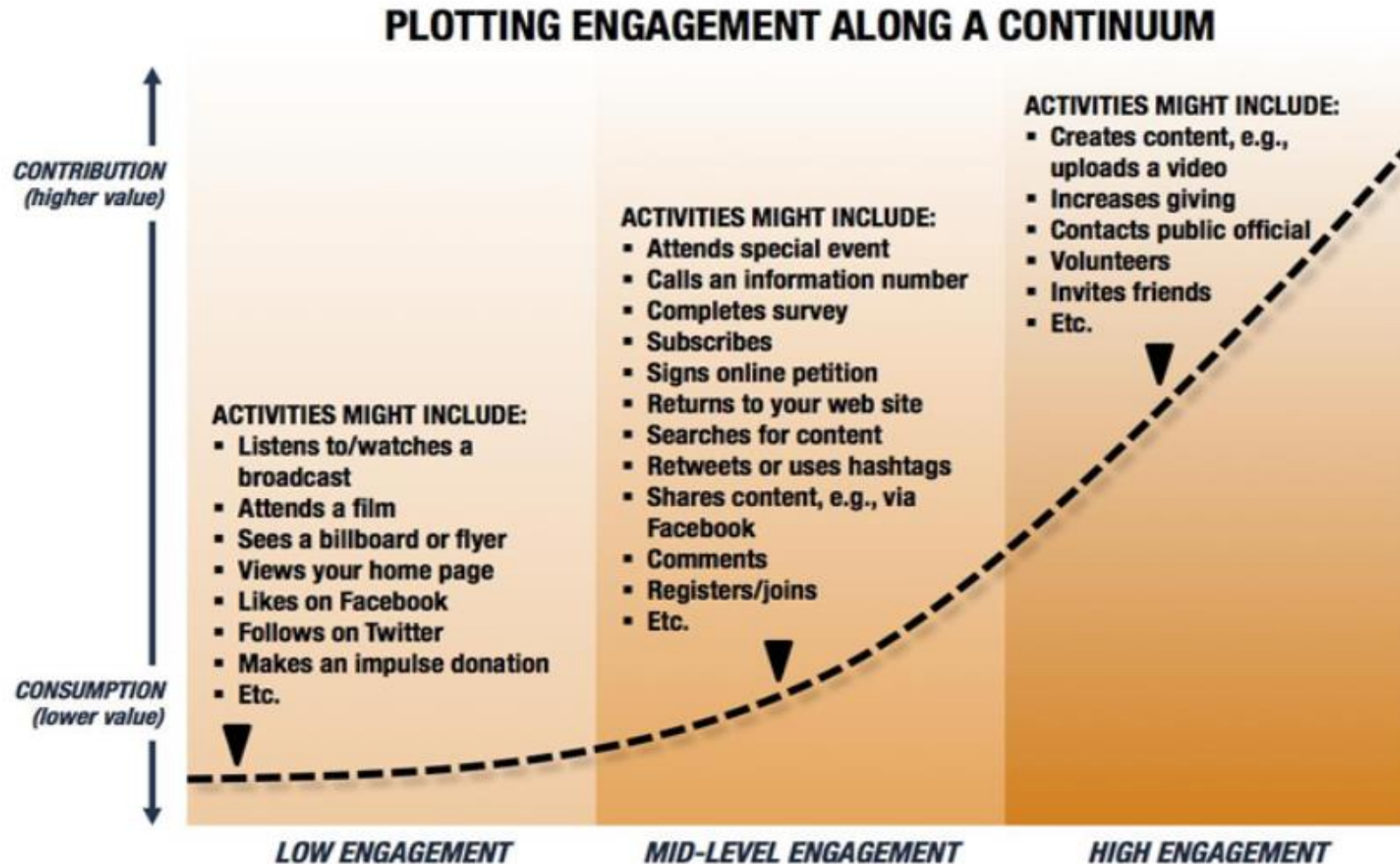
Who might give again and how much?

Who might become a regular giver?

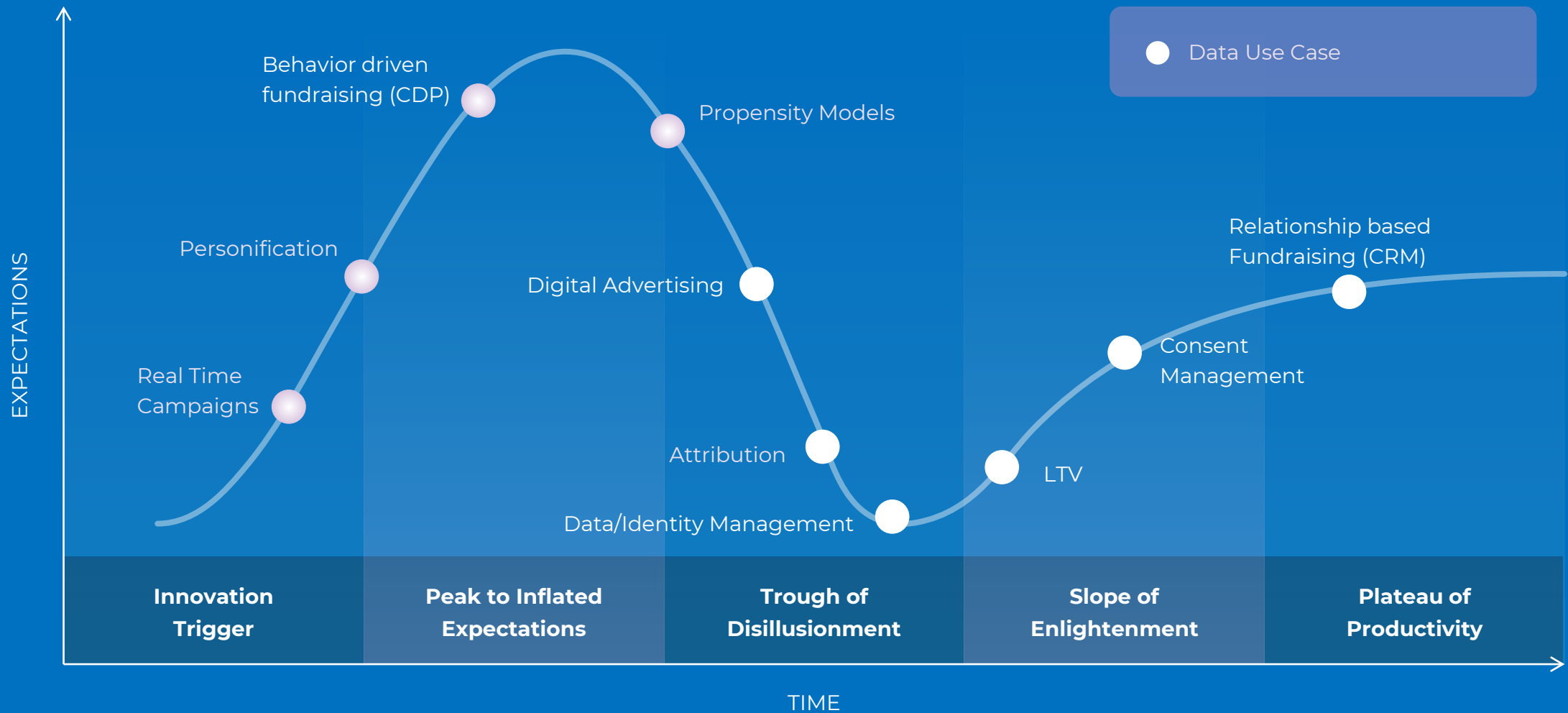
What regular givers are at risk of lapsing?



Engagement Scoring and Propensity



CRM/CDP Hype cycle for non-profits



Q&A

The image features the text "Q&A" rendered in a bold, three-dimensional, blue font. The characters are thick and blocky, with a slight shadow cast beneath them, giving them a sense of depth. The "Q" has a large, circular opening, the "&" is a standard ampersand, and the "A" is a simple, wide letter. The entire text is set against a plain white background.



AI – Rise of the Machines, and Cake.

15 November 2023, 2pm.
Royal College of Nursing.

