

**MOMENTUM** 2022 Annual Conference and Trade Show - August 30 - September 1, 2022 LeadingAge  
Ohio

**Don't let data get you down!**

Amy Wong, president, Dot Org Solutions LLC

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**About me**



- More than 30 years of experience in the nonprofit fundraising, marketing and operations
- Founded Dot Org in 2009
- Frequent blogger, presenter and writer on marketing, fundraising and leadership
- B.S. in Journalism, Bowling Green State Univ.
- Graduate, Goldman Sachs 10,000 Small Business Program

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**What are your thoughts on data?**

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**My observations about data**  
*It's easy to get stressed out about it.*

- More data than we can manage
- We're less "squeamish" about the data people have about us – sometimes.
- We're more aware of what is collected.
- We're expecting customized experiences.

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**Session overview**

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**Today's objectives**  
*What I hope you will learn today*

- The importance of donor data and keeping it clean to raise more money.
- Key terms in digital media and how they relate to communication and marketing performance.
- How to leverage your data to inform future campaigns.

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**A systematic approach to data**

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**The data continuum**  
*How to approach your data in a systematic way*

- Collect and contain
- Centralize and concentrate
- Clean and care
- Compare (reporting) and/or curate

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**Collect and contain**  
*It's coming and going everywhere.*

- Sources
- Formats
- Systems/repositories
- Uses
- Users

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**Centralize and concentrate**  
*You must corral the beast(s)!*

- Fix decentralization
- Fewer tools
- Better systems

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**Clean and care**  
*Give your data the attention it deserves.*

- Written procedures
- Dedicated people
- Scheduled, ongoing updates, regular cleaning/purging

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**Compare and curate**  
*Get the reports and information you need to drive decisions.*

- Begin with the end in mind.
- GIGO
- Know what you want first
- Curate the data based on needs
- Use canned reports when possible
- Invest in custom reports when necessary

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**Driving donations through data**

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**Get to know your donors**  
*Use data to increase and enhance connections.*

- People want personalized experiences
- Not all donors are the same – don't lump them together
- Develop meaningful relationships and connections

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**Collect data that matters**  
*Relevant donor data is essential to raising more money.*

- Demographics (name, address, contact info, age, marital status)
- Gift information/history
- Areas of interest
- Preferred communication type
- Pledges
- Committee/board memberships, other affiliations
- Event attendance
- Spouse/partner information

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**Match your appeal to your donor**  
*One size does NOT fit all.*

- Donor type – new or long-term, small or major
- Area of interest
- Communication preferences – mail, email, in-person, social, events
- Messages that matter
- Timing

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**Making sense of digital media data**

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**Digital marketing basics**  
*All campaigns need to be based on one of four key goals/drivers.*

- Acquisition
- Awareness
- Conversion
- Engagement

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### Digital marketing basics - organic

*Know the general lingo.*

- Email – open rates, click rates, click through rates, bounce rates
- Social media – Likes, shares, clicks, interactions, impressions
- Websites – bounce rate, pageviews, visitors, unique visitors, device types, pages visited

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### Digital marketing basics - paid

*Know the general lingo.*

• Impressions	• Unique link clicks
• Reach	• Link clicks
• CPC	• Cost per result
• CPM	• Quality ranking
• Total engagement	• Engagement rate ranking
• Engagement rate	• Conversion rate ranking
• Frequency	

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## What do I do with it all?

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**Using your data to inform decisions**  
*Plan for donor engagement and solicitations*

- YOY giving
- LYBUNTS/SYBUNTS
- Communications preferences
- First-time donors
- Lifetime giving
- Giving preferences/habits

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**Using your data to inform decisions**  
*Use email marketing data to inform, engage and convert.*

- Reader habits
- Engagement
- Bounces
- Performance by segment
- Personalization opportunities

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**Using your data to inform decisions**  
*Get your website working for you.*

- Automation
- Bounce rate reduction
- Conversion increases
- CTAs
- Forms

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## Using your data to inform decisions

*Be the center of attention.*

- Organic
  - Interactions
  - Post performance
  - Time
- Paid
  - Impressions
  - Shares
  - Clickthrough rates/action
  - Conversions

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**Time for review**

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**Questions?**

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**Review and recap**  
*Data is one of your organization's most valuable assets.*

- Develop your data continuum
  - Collect, centralize, clean, curate
- Create personalized experiences for donors, prospects, leads using data
- Include key metrics in every campaign
  - Acquisition, awareness, conversion, engagement
- Understand digital measurement terms
- Inform future marketing and fundraising with data.

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**Connect with me**



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[LinkedIn.com/in/amycwong](https://www.linkedin.com/in/amycwong)

**Additional resources:**  
[Dotorgsolutions.com/leading-age-ohio-2022](https://dotorgsolutions.com/leading-age-ohio-2022)

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