How to Manage Contacts

FOR YOUR CAUSE

Related topics:

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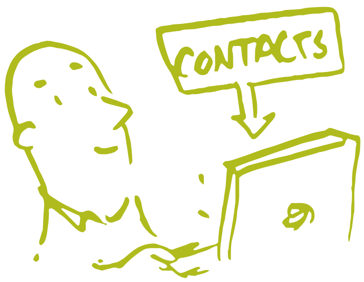

This worksheet is a complementary guide to help you put into practice the advice found in our "How to Manage Contacts for Your Cause" video. Each 3-minute video is packed with information and is designed to be watched multiple times—even while you are completing this worksheet.

WHAT Develop a plan to maintain information and constituents to foster deeper engagement and support for your cause.

TIME REQUIRED 8 hours of development, 1 hour of training

WHO IS INVOLVED This process is best completed by one lead with further input, review, and refinement from other team members.

Proper management of contact information is vital to the health of your cause. A contact database or Constituent Relationship Management (CRM) software doesn't just hold contact information, it can also streamline workflow, increase information-sharing across the organization, and improve your conversion rate.

1. **Ask your team how they currently manage their contacts and what they'd like to improve**
2. **Choose a system that meets the greatest number of these needs**
3. **Get everyone using it**

Here is a list of what you will have when you complete the steps:

- A compilation of existing contact information sources in the organization
- A prioritization of top needs and desires for the contact database
- A plan for implementing and maintaining your new contact database

For more help, contact Cause Communications at ***info@CauseComm.org*** or visit ***CauseCommunications.org/tools*** to see other Bite-Size Courses.

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The overall goal for a Constituent Relationship Management (CRM) system is to make outreach and relationship-building with supporters and potential supporters easier and faster. Involve all stakeholders that will be using the system in the planning process.

1. Ask your team how they currently manage their contacts and what they'd like to improve.

A. Talk to each department, committee, or group that interacts with your constituents. Think beyond current and prospective donors: additional groups may include volunteers, event attendees, and advocacy campaign participants. How and where are contacts managed and what would make it easier to keep this information accessible and up-to-date? How should it be organized to be most effective (e.g., segmenting constituents by specific characteristics)? What functionality or features does your system need to have (e.g., knowing the last time the supporter was contacted)?

B. From these interviews, develop a list of priorities that define your organizational and programmatic needs.

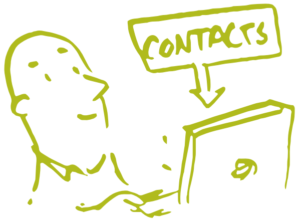
2. Choose a system that meets the greatest number of these needs:

Once you have your list of priorities and requirements it is time to review the options available and determine the best fit.

A. To understand all the different types of systems and their general strengths and weaknesses, research the various types of databases and software available. Finding the system or systems that make sense for you is a matter of matching up the features with your needs within the context of other criteria, like your budget.

B. Talk to other comparable organizations and find out what systems they are using, what they like and what they don't.

C. Narrow to 2-3 finalists and ask team members to take part in a demo of the software. Buy-in from staff on the chosen system is important, so be sure the decision includes their input.



3. Get everyone using it:

Training and assistance for team members to help them get acquainted with the new system, how it works and where they can find help is vital to its success.

A. Create a user committee to be a part of the set-up and implementation process and to provide feedback on the true adoption of the system and workflow of the organization. The committee should include members from all departments or groups that will be using the system.

B. Adopt guidelines for data entry and usage specifications (e.g., data ownership and management), key performance indicators (KPIs), and staff incentives. Consider adding CRM responsibilities to job descriptions or including KPI targets in quarterly performance reviews. Give awards to staff members who find ways to significantly improve key CRM metrics.

C. Schedule training sessions and outline a process for "tech support."