Using [CRM] at [Organization]

We use [CRM] to track donations and key contacts. It can help you manage relationships and communicate with friends and supporters of [Organization]. It's a good way to ensure we share what we know with each other. If you have questions, talk to [CRM 'owners' at your organization]

1. Getting Help

CRM help documents, webinars, account key contacts, any other resources

2. Entering Constituents

Types of Constituents (Individuals, Families/Households, Organizations)
Relationships might be important – eg board members, leaders, program officers related to organizations, foundations, etc. (or this might not matter to your org)
Most important Tags/Flags/Activist Codes

3. Entering Gifts

Ledger codes, Solicitation/sub solicitation, and/or source codes. Note: Cleanup database at beginning of each fiscal year with new codes, eg Annual Fund 2020, Annual Fund 2021, etc.

4. Sending thank you letters, acknowledgements, etc.

Receipts, thanking gifts, end of year cumulative thank-yous.
Most CRMs have a place to upload a thank you letter for your campaigns (and each campaign should probably have its own thank-you letter- save time and write the thank you when you plan the campaign you and co-workers will be able to acknowledge gifts faster).

5. Pulling Names, Lists & Reports

From pulling a single name to making a list by tag or code – this is probably the most helpful information for the whole team. Consider giving a few examples that you know will be relevant to colleagues. Workflow probably different for different types of reports (eg mailing list, donor report)

6. Sending Email

If you use your CRM to communicate directly with constituents, include a workflow for this – even if it is just "talk to [teammate] to schedule a targeted email. .