

## The Fundraiser's Dream: A Dashboard That Gets Results

As you head into your quarterly board meeting, you're looking forward to touching base with them and making sure that everyone is on the same page. However, you're experiencing stress and frustration because you haven't been able to generate a thorough **snapshot of your campaign's current status**. You marvel at how much easier your life would be if you simply had the ability to do so with the click of a button!

Has your staff ever been required to spend countless hours manually creating a report of total dollars raised? Are you uncomfortable with, and untrusting of, the accuracy of the reports which come from your database?

Why does your organization continue to tolerate the same aggravating problems each and every time a campaign report is needed? You deserve better!

It's time to take action and stop beating around the bush. RESolutionsTECH's sympathetic and highly-trained team is here to eliminate your reporting dilemmas and rid you of your unnecessary frustrations, once and for all!

### So, how can you accomplish this? Here are the basic do-it-yourself steps to create your own **Dashboards**:

- Create your **dream report** manually; this only needs to be done once.
- Clearly document each **data element** and **summary field** in your report.
- Document **what is possible** and **what is not** based on your current database setup.
- Create and implement **steps to improve** your database setup.
- Create **desired reporting** once without having to re-do manually ever again.

## The Dashboard

The Raiser's Edge offers several different methods of retrieving information and reporting on data. Your data can be displayed in any number of formats. One of the most visually appealing ways of displaying information in Raiser's Edge is through the use of the **Dashboard** feature.

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## The Dashboard continued

The Dashboard provides a **real-time summary of information** that can be **customized for any user's unique reporting needs** and **displayed at the click of a button**. The purpose of the Dashboard is to give the Raiser's Edge user **fast, accurate and up-to-date information** on where the organization is at in terms of **reaching specific goals**. These goals can be related to fundraising, volunteer management, solicitor management or event participation. Dashboards are easily built to display **tables, graphs, or both**. They are excellent for reports of analytical, statistical or financial information within Raiser's Edge.

For example, Dashboards can be built to display all donations in a current month or current year based on an organization's **top 50 prospects**. A Dashboard can be used to **compare** related Funds, Appeals or Campaigns in order to give a quick representation of how close an organization is to **reaching its fundraising goals** or to compare and analyze **fundraising results over time**. In other words, the Raiser's Edge user has **tremendous flexibility** as to how the Dashboard is built, the information it contains and how that data is displayed. The graphs and tables created in the Dashboard present information obtained from **several different areas throughout Raiser's Edge**, thereby giving users the options necessary to build Dashboards that are **most relevant to their needs and their role** within the organization.

While Dashboards are typically the most popular with senior management personnel who require **real-time information** to be **displayed easily** without building queries or reports, every Raiser's Edge user, regardless of her/his role, will appreciate the **visually dynamic** display of information. In addition to traditional Dashboards, other types of Dashboards are being put to good use by charities and non-profit organizations of all sizes.

### Alternative Uses of Dashboard

- ✓ Data entry problems (e.g. Errors in entering new constituents, gifts, and actions).
- ✓ Donations outside predicted giving level (e.g. Predicted annual fund donor gives major gift).
- ✓ Prospect activity (e.g. Major gift donor attends recent event).
- ✓ Fundraiser inactivity (e.g. Fundraisers are not making enough visits to meet with donors).
- ✓ Pipeline activity (e.g. Projected gift that is 10% close to closing moves up to 90% close to closing).

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## Other Reporting Options

Keep in mind however, that like any pre-built reporting tool, there are **certain limitations to Dashboard**. This means that there's a chance you might not be able to generate the exact information you require. If your organization finds that Dashboards are not able to meet all of your visual reporting needs, then creating a **Crystal Report** might be your best alternative. A Crystal Report provides all the benefits of both a traditional report and a Dashboard while alleviating the built-in restrictions that naturally hinder the Raiser's Edge reporting functionalities. **Do not let anything get in the way of** acquiring the reporting that you need. **Anything is possible!** Be careful what you ask for though; the results of such precise reporting tools can sometimes be a little too real. :)

### How Can Your Organization Take It To The Next Level?

- ✓ Dashboards e-mailed to you on a daily basis.
- ✓ Automatic e-mailing to notify you of key milestones being met or not.
- ✓ Instant access to Dashboards from your Blackberry, iPhone, or iPad.
- ✓ Dashboards based on external data (e.g. social networks, web and e-mail metrics).
- ✓ Real-time predictive model Dashboards (e.g. top major giving, annual giving, planned giving prospects).

## Do You Get External Help?

It is also important to remember that like all reporting tools, the **Dashboard is reflective of the data that is input into Raiser's Edge**. Therefore, accurate information can only be retrieved if data is being populated into Raiser's Edge in a consistent and accurate manner. The notion of "**Garbage In – Garbage Out**" applies just as much to the Dashboard feature as it does to reports and queries. In fact, Dashboards can help identify where problems exist within your database. Creating a Dashboard is a great first step to getting rid of your garbage data.

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### How to Get What You Need and Save Money

- ✓ Sketch out your dream report.
- ✓ Document data elements and summary fields in a report.
- ✓ Request a **quote from a consultant** to complete your dream report.
- ✓ Decide which method of reporting makes the **most economic sense**: utilizing an internal team, a consultant, or both.
- ✓ Measure how much **time and money** you can save your organization.

With any database system, the ability to retrieve accurate, real-time information is an absolute necessity. Raiser's Edge is no different. The reason that an organization carefully and accurately tracks and maintains Constituent information is so that **analytical, statistical, demographical and financial data can be retrieved from the system**. Frequently, however, this can be a burdensome and difficult task, and often the **end results are not as intended** in either **format or content**. At RESolutionsTECH, **we are data clean-up and reporting experts** and can assist your organization in retrieving **accurate data** in any format you wish. Whether you require queries, standard reports, Dashboards, or Crystal Reports, our goal is to ensure that you **receive the information you need**, in the **format you desire**, with the absolute **highest level of accuracy possible**.

### Next Steps – What RESolutionsTECH Can Do For You

- ✓ Provide a **quote** on any Raiser's Edge-related task.
- ✓ Train staff on how to be more self-sufficient with your database and reporting needs.
- ✓ Clean up your database to ensure a higher accuracy of reporting.
- ✓ Create all of your single-click dream reports.
- ✓ Assist you with **analyzing** your reports to improve fundraising results.

RESolutionsTECH is here to assist your organization and make life easier. Let's get rid of your frustrations and improve the quality of your database. Stop daydreaming, and make accurate, efficient reporting an everyday reality.

**Contact us to Discover how we can Help you!**

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