

Epilepsy Foundation logs record fundraising year with new donor management system

By partnering with StratulIVE, this nonprofit leveraged a Dynamics 365 tool to forge deeper donor relationships



Customer
Epilepsy Foundation

Partner
StratulIVE

Products and Services
Dynamics 365 Sales
Dynamics CRM

Industry
Nonprofit

Organization Size
Medium (50 - 99 employees)

Country
United States

By partnering with StratulIVE, this nonprofit leveraged a customized Dynamics 365 tool to forge deeper relationships.

Epilepsy Foundation's previous CRM system constantly went over budget, and worse, it made fundraising staff's jobs more difficult. Now, a platform based on Microsoft Dynamics 365, customized by StratulIVE, empowers development staff to better understand donors, shepherd stakeholders through the giving process, understand contribution trends, and ultimately raise more funds to improve the lives of people living with epilepsy.

A large painting depicting musical notes, dancers, and a beehive may not, at first glance, seem to have anything to do with a medical condition. But Angie, who lives with epilepsy, created it to work through her own medical diagnosis and connect with others living with epilepsy.

"Using Dynamics 365, we think more broadly, better engage our donors, and serve our mission."

—Geoff DeLizzo, Chief Development Officer
Epilepsy Foundation



Angie is one of thousands of people nationwide who have participated in Studio E, a group therapeutic art program run by the nonprofit Epilepsy Foundation (EF). The program is one way the organization works to improve and save the lives of those affected by epilepsy through education, outreach, research, and developing new therapies.

"Studio E gave me an opportunity for support. It gave me an opportunity for fellowship. It gave me an opportunity to heal," Angie says. "Studio E has given me a foothold to move forward."

Funding initiatives such as the therapeutic art program is at the heart of EF's mission. And by upgrading its technological infrastructure, the nonprofit's fundraising staff is able to better connect with donors, raise more money, and ultimately deliver on the foundation's mission.

"Fundraising at its core is about data and information. Having that data at my fingertips makes us more productive as an organization."

—Geoff DeLizzo, Chief Development Officer
Epilepsy Foundation

Inefficient technology limited fundraising efforts

Before switching to a Microsoft Dynamics 365-based CRM platform, EF fundraising staff found themselves splitting their time between different software, spreadsheets, and screens. With its old donor-management tool, development staff would have to search spreadsheets, copy and paste emails, transfer meeting notes, and relay data throughout the day, so they'd spend 20-30 percent of their time on housekeeping tasks instead of the core fundraising efforts the nonprofit depends on.

What's more, they didn't have crucial donor information in easy-to-understand formats. They'd struggle to identify trends among donor groups because only one or two people had the technical know-how to run reports. And details about the organization's relationship with donors over time was stuck in emails, spreadsheets, staff's hard drives, and the donor management tool.

"We wanted to have and do everything in one place," explains Geoff DeLizzo, Chief Development Officer at Epilepsy Foundation.

Creating a donor management tool that delivers

When EF began meetings with StratulIVE, a donor management software company that builds its solutions based on Microsoft tools, the nonprofit was looking for a way to streamline its already fundraising process. By developing a CRM platform based on Dynamics 365, it got a solution that answers that need—and does so much more.

The StratulIVE suite of tools includes not only donor management capabilities but also options for constituent management, fundraising, and marketing—resulting in day-to-day efficiencies and dramatic increases in donations.

"This new platform takes us away from the one-tick pony of a donor database," DeLizzo says. "It allows us to see the entire picture of our organization. Using Dynamics 365, we think more broadly, better engage our donors, and serve our mission."



Running a giving campaign that multiplies impact

EF gets more than three-quarters of its budget from individual and corporate contributions, gifts, and fundraising events. It's clear to development staff, then, that an increase in donations equals an increase in their efforts to improve the lives of those with epilepsy.

The year following the adoption of the Dynamics 365 platform proved to be its most successful fundraising period ever, in part because of how seamlessly its donation platform integrates into its CRM system. By syncing to the online giving tool, Dynamics 365 automatically populates necessary fields in the CRM platform. Then Dynamics 365 matches contacts, creates new contacts, and records the relevant data (such as which call to action motivated the gift) that will help fundraisers follow up during future campaigns. "Dynamics 365 does it all. There's little to no user intervention that happens," says Katie Radicki, the project manager at StratulIVE who worked on the customized Dynamics 365 platform for EF. "Dynamics 365 does it all. There's little to no user intervention that happens," says Katie Radicki, the project manager at StratulIVE who worked on the customized Dynamics 365 platform for EF.

In the year after adopting the Dynamics 365 platform customized by StratulIVE and the new online giving portal, the average donor gift increased by 32 percent, and overall contributions increased 21 percent. For EF, that means more funds for researching new treatment options, training people in first aid for seizures, and investigating the neurological causes of the condition.

"We helped Epilepsy Foundation create a more robust online giving platform with multiple pages and customized content," Radicki adds. "By creating specific messaging to donors with different interests and ask strings customized to events and web pages, we helped them drive up donations."

Understanding donors' passion to build deeper relationships

"Yes, fundraising is about relationships, but I can't do much if I don't know much about a donor," DeLizzo says. "Fundraising at its core is about data and information. Having that data at my fingertips makes us more productive as an organization."

With its customized platform, EF creates a treasure trove of details on every donor. Are they more interested in advocacy or programming like summer camps for children with epilepsy? Do they volunteer? Do they give consistently? The platform also includes areas to record details unrelated to giving history, such as the name of a pet or where a donor grew up.

This level of detail helps EF fundraising staff connect authentically, personalize every interaction with donors, and actually provide them with what they want. "When you're providing donors with timely and relevant information, it's almost never annoying," DeLizzo says. "Dynamics 365 helps us understand what our donors are interested in and the best way of delivering that information."

Crafting more responsive stewardship for every stakeholder

EF's platform does more than just track donors; it also integrates its databases of volunteers, advocates, and newsletter subscribers. The nonprofit used to employ different software and spreadsheets for each of these groups but now has information on all stakeholders in one place.

The one-stop-shop for stakeholder information allows EF staff to see the broad ecosystem of the organization and how constituents are interacting with it in multiple ways. They might realize, for example, that a given volunteer has helped at events for years but never donated. That insight—made possible by Dynamics 365—signals to staff that they can create a workflow to cultivate that volunteer into a financial supporter as well.

Dynamics 365 allows staff to record and use the information to make stakeholder outreach feel genuine and personalized. For example, by understanding that a volunteer has hosted a "Purple Pumpkin Party," an event that spreads awareness of epilepsy during the Halloween season, fundraisers can tailor that they are probably most interested in community education and outreach—and so can tailor their initial ask accordingly.

The dashboard also integrates into the nonprofit's finance system, so every incoming dollar passes through the platform. That way, a donor's point of contact is notified the second that a donation arrives, instead of waiting up to three or four days for word to get from accounting to fundraising, as often happened under its old system, fundraising staff now knew instantly when the organization receives a gift—and can act accordingly. DeLizzo says, "Dynamics 365 shortens the lag of engaging donors. We can immediately pick up the phone and say, 'thank you!'"



Analyzing data to support the mission

"Every nonprofit must reach and engage new donors, retain existing donors, and expand the voice advocates and volunteers play," explains Radicki. "StratulIVE's customized platform empowers the Epilepsy Foundation to do all that so it can have a greater impact on its mission."

The Dynamics 365 platform is intuitive enough so that any fundraiser can run reports with a minimum of training, helping them gain the insights they need for donor cultivation and stewardship. StratulIVE has coded commands for several more complex reports that staff can then run on their own. One such report, which analyzes outstanding pledges that haven't yet been fulfilled, empowers staff to follow up on things like recurring gifts on an expired credit card.

Other insights allow fundraisers to shepherd donors to make larger gifts. One report showed the department that the average donation in support of research was about 13 times greater than the average auction gift, for example. So when fundraisers understand that donors are interested in research—based on what newsletter stories they clicked through or where they spent the most time on the EF website, all of which information is collected in the StratulIVE platform—they can tailor an ask based on those insights. "By identifying donor trends, we're able to make a bigger ask because we have that information. We don't have to guess," DeLizzo says.

Never "dropping the ball" on fundraising tasks

EF fundraisers work on up to 200 accounts each. "There's literally no way you can keep everything in your head when you're working with so many donors," DeLizzo says. "Our system works without you having to remember or manually enter every single bit of data or every task you're doing."

Nonprofit staff add tasks every time they enter something into a donor's profile on the platform, whether it's sending a follow-up email or wishing a donor's grandchild a happy birthday. That task pops up on the staff's personal dashboard, Outlook calendar, and even email. "This allows us to never drop the ball," DeLizzo says. Additionally, the Dynamics widget in Office 365 renders these tasks, records upcoming appointments, and links emails—automatically.

What's more, fundraising managers' personal dashboards display information that keeps them on top of everything happening in the department. That way, managers know about deadlines for important staff tasks, track incoming donations against goals, and access an at-a-glance view of what staff are working on in a given day—without constant meetings, email threads, or check-ins. "My dashboard allows me to see the whole picture," DeLizzo says. "It helps the whole team hold themselves accountable."

The cumulative effects of efficient workflows in Dynamics 365 add up to a big impact. DeLizzo adds, "Now we never miss anything we promise to do for a donor."

Read out more about [Epilepsy Foundation](#).