Donorfy Together 2025

Health Check your Donorfy

I'm Chloe

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★ Specialise in:
  ○ **Fundraising** CRMs, **Impact Measurement** and **Membership** databases.
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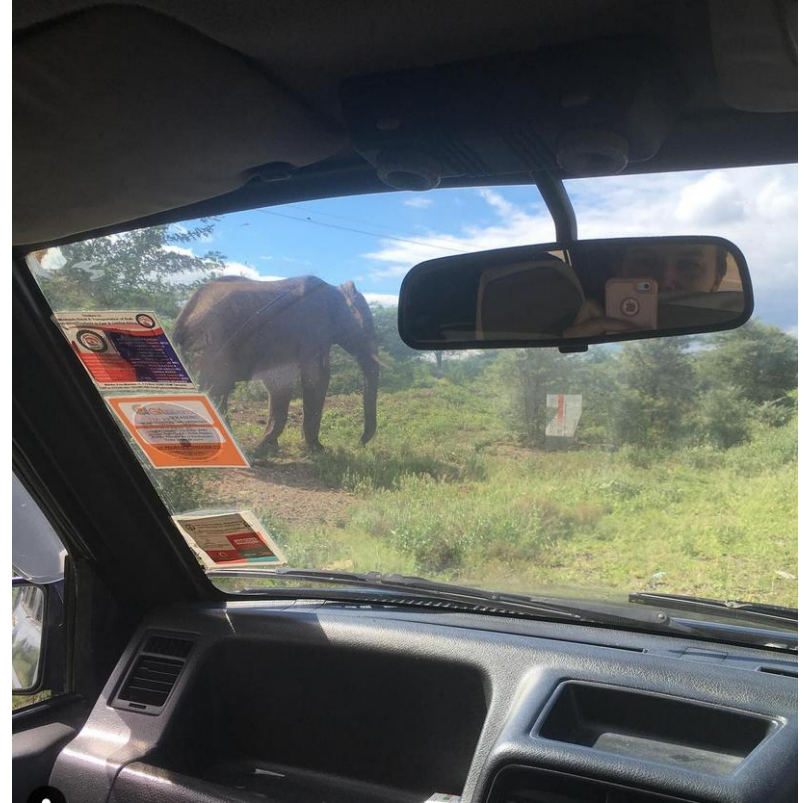★ Safari Agent at Green Light Ventures

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Tanzania

The Suzuki Diaries

The way you never want to
see your car engine....

How does this relate to Donorfy?

Having Donorfy is a bit like having a car.

- *If you don't fix the 'leaky pipes' it can cause problems down the line*

- *The earlier you spot the problem, the less damage there will be*

- *If you regularly keep on top of things, your Donorfy could go for 30 years?*

Why might you take your car to a mechanic?

A warning light comes on

Something doesn't feel right, strange noise

Your car does something worrying, like starts smoking

Every 10k miles, or for your MOT

Does your Donorfy need some TLC?

A warning light comes on

★ *Sneaky spreadsheets*

★ *People are complaining*

Your car does something worrying, like starts smoking

★ *People are talking about moving to a new system, or you've already started looking.*

Is the grass actually greener?

Something doesn't feel right, strange noise

★ *Reporting seems off*

★ *People say it's hard to use*

Every 10k miles, or for your MOT

★ *You've not done much with Donorfy since you first got it, or it's been a while……*

Let's talk about Health Checks

Case Study: Longfield Hospice

The Situation

*The team had been using Donorfy for **2 years.** Some key staff, who had been involved in implementing Donorfy, had left the organisation. On top of that, there were some key challenges that meant that Donorfy **wasn't being used to its full capacity**. The team wanted to **feel confiden**t in using Donorfy going forward, and to ensure they were getting the most from the system.*

Case Study: Longfield Hospice

What did we do?

Due to the size of the team and situations that needed troubleshooting, we decided that a **workshop** *and* **training** *approach would be best.*

We had sessions on:

- *Troubleshooting the use of integrations*
- *How to configure and customise the system to meet the team's needs going forward*
- *Efficient use of Donorfy, where things felt quite cumbersome and long winded. Were they doing things in the best way?*

We also did some **training** *in key areas including reporting, automation and configuration.*

Case Study: Longfield Hospice

The Result?

- *Throughout the workshops, the team had many **'aha!'** moments where they realised things could be done a lot more simply and that they could make use of many features that would make their life easier*
- *They set up a **plan and assigned tasks** to relevant team members to make sure that the changes would be put into place*
- *There were some cases where **processes** had to be done in a more complex way, so the team were able to identify this and ensure there was sufficient **documentation** around this*
- *The team felt **more confident** at using Donorfy in general and how to troubleshoot issues moving forwards.*

Case Study: The Lily Foundation

The Situation

*The team had been using Donorfy for a **few years** but hadn't been using it to its full capacity. The team wanted to feel **more confident** to make use of Donorfy for all their needs.*

Case Study: The Lily Foundation

What did we do?

*We worked through a Core Insights Donorfy Health Check. The **5 sessions** helped the team to **identify gaps** and to understand what changes needed to be made. We identified areas for improvement and created an **action plan** to be able to put these changes into place.*

Between sessions, they worked on action points to make Donorfy work better for them.

*Some follow up **workshops** and **training for the wider team** ensured that Donorfy could be used more broadly, but mostly, the team felt confident continuing to make improvements independently.*

> "The health check was just what we needed as an organisation to think about how we could improve things within the charity. It made us think about how we can use Donorfy to its maximum potential."

Claire Wright, The Lily Foundation

The Result?

- *The team felt that they had a **better understanding** of Donorfy and how to approach problem solving.*
- *They had more **confidence** in using Donorfy and knowledge of how it can help the team*
- *Felt more **confident using technology in general***

How to do a Health Check

Health Checks: what can they consist of?

1. *Overview:*
   - *Are you using all areas of Donorfy for all your areas of Fundraising?*
   - *How well?*
   - *Any additional spreadsheets/paper/documents that you think would be better in Donorfy?*

Health Checks

2. Integrations:

- *How well is Donorfy integrated with the other tools you use?*
- *For ones that can't be integrated directly, do you have a regular process to add data to Donorfy?*

Health Checks

3. Finances:

- *Do all donations/transactions get added to Donorfy?*
- *Reconciliation: integrations*
- *Regular donations*

Health Checks

4. Configuration:

- Tags, constituent types, activities, campaigns
- Finance & Memberships
- Opportunity pipelines

Health Checks

5. Data quality

- *How confident are you in the accuracy of your data in Donorfy?*
- *Consistent use of customisation (e.g. tags)*
- *Historic data?*

Health Checks

6. Reporting

- *Lists*
- *Organisation/List Tags*
- *Visualisation/PowerBI*

Health Checks

7. Other Key Areas

- ○ *Security centre*
- ○ *Automations*
- ○ *Users*
- ○ *Donorfy account*
- ○ *Profile*
- ○ *Community: Donorfy Chat, Mailings, Academy, Support*

Health Checks

1 — **2** — **3** — **4** — **5**

Identify the pain points

Diagnose the Problem

Set up a realistic plan

Invest time and resources into fixing the problems

Make sure you have resource to maintain the system moving forwards

Benefits

★ *Use Donorfy to its full potential.*
★ *Happier and more empowered team.*
★ *Longevity into your system rather than having to do a full change.*

Meet your mechanic

- ★ Core Insights Donorfy Health Checks:
  - ○ 5 sessions to identify where you can be getting more from Donorfy and make a plan
- ★ Health Check workshops
  - ○ More in-depth consultancy support
  - ○ Deep Dive into your system
  - ○ Training and support to make changes

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A final note about resourcing….

Could do a whole other session on this! But…..

- *A Health Check needs resourcing*
- *Having the right roles in place in your organisation will help you make sure that someone is keeping on top of your system*
- *Resourcing Donorfy properly and completing housekeeping tasks ensures that you can get the most from the system.*

Questions?