Chat with Alfred Schnabel - 7-12-18

CRM tool from Salsa

* Was company interested in helping polit campaigns and advocacy groups

Merged with donorPro and produced two new systems.

CRM - all donors listed there

* Donation history
* Donors
* Biographical info

Salsa Engage - send out email, fundraisers

* Kind of new product

Big fall fundraiser - using pages in Salsa Engage

* Legislative actions can be used, but we don’t use.
* Great for sending out emails, but for donation history - look at CRM

Nonprofit donor classes

* LYBUNT - Last year but unfortunately not this year
* SYBUNT - Some years but unfortunately not this year

Donations - January - December.

Can easily isolate those for us

* Constituent Information
* Demographics
  + MySalsaCRM - Info that secretary collected
    - College
    - What studied
    - Which high school
  + Reasonably complete information on where they went to school
* Common Custom Fields
  + This is stuff that’s used for SalsaEngage

Fields complete enough

* \*\*\*\* PGSS year is fairly complete

David attended in 1986 - he works really hard to get them to donate

Not a lot in early 80s

Salsa Engage - very colorful, newer than CRM

Type of email - fundraising

* Unsubscribers can opt-out of fundraising

Choose groups to receive this email - saved database query

Compose email - from Heidi or David

From scratch - can use templates.

Click on Rows button to add panels

In container - click upper left corner of panel to reposition

Click on Elements button to add content - text, images, button, etc.

Click on the face item to add DB content.

Sybunts may not have a last donation amount - if they paid by check.

Click a button then choose link to Donate page.

Email - Split - entirely random

Shouldn’t send out an email at midnight - in morning is better.

(Schedule for later)

Looking at results from emails

Think about maybe subdividing the groups into smaller for stepped wedge design?

Most people wait until last minute - or at least many.