Giving Campaign Reporting

Pro-Tips for Successful Tracking & Storytelling

YourCause + blackbaud

Better Together.

Quick Notes:

- These tips pertain to donations made using our Giving Campaign Feature. For other giving initiatives, utilize standard Give reporting options.
- Your Account Manager is your best resource for strategizing on which reports to use to tell the story of your employee engagement.

The Golden Rule of Campaign Reports

Never attempt to compare Giving Campaign totals across different reporting resources. Different reporting resources may update on varying cadences, so attempts to compare dollar for dollar during high velocity giving hours will only bring you headaches. Select a "true source" for your campaign reports and stick to it.

Set the Stage

When deciding the best method to report on your Giving Campaign, ask yourself these questions:

- What are my goals?
- Do I have segments?
- How frequently will I be providing comprehensive campaign updates to internal teams?
- What is our leadership team focused on?
- What types of questions will I be fielding "on the fly" throughout the campaign?
- How will I tell our Giving Campaign story after the campaign wraps up?

Know Your Options

- **Traditional Giving Campaign Reports**
  - Our standard offering of Giving Campaign reports is comprehensive and multi-lensed
  - Basic Excel skills needed
  - Everything you need and more
  - Segment considerations: Yes
  - Who can access: Any designated admin
  - Update Time: 6x Daily
- **Campaign Tracker**
  - High-level view of Giving Campaign totals and YOY comparison
  - Segment considerations: Yes

    - Who can access: Any designated admin
    - Update Time: 2x Daily
- **Homepage Totals**
    - The best way to see "where are we right now" in terms of dollars or percent
    - Segment Considerations: Yes
    - Who can access: All employees within segment
    - Update Time: LIVE
- **Tableau**
    - Slice and dice your Giving Campaign data and prefilter
    - Advanced planning and training needed
    - Segment considerations: Up to you!
    - Who can access: Anyone with Tableau licence (Contracting may be required)
    - Update Time: 6x Daily

Practice Makes Perfect!

- The time you invest preparing for reporting will pay off ten fold during the campaign.
- Work with your Account Manager to train on all Giving Campaign reporting ahead of time.
- Make sure you're 100% comfortable accessing your campaign reports before the campaign starts.
- Know the data! Review the reports, reporting resources, and ask questions before the campaign starts. Your Account Manager is there to help you learn.
- Record your trainings and create a resource bank - this will be a big help in the heat of the campaign!
- Do a "dress rehearsal" to practice answering known "hot potato" questions.
- Train your team!