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**Less data admin,  
more fundraising**



# “What is the biggest pain point or frustration in your role?”

“Nothing is joined up. Not all of our data is on the database”

“It’s got to be systems and the database and the fact that we can’t measure what we need to measure, so we don’t have the direction that we need”

“We’ve got a huge number of platforms and it’s a huge frustration for fundraising teams”

“Syncing between fundraising and finance systems for reconciliation”

“If we don’t know who our supporters are or what they’re getting, how can we possibly improve?”

PROBLEM



30 platforms

1 day per week

# The impact of data fragmentation

## FUNDRAISERS

Wasted time

Lack of data trust

Human error

## SUPPORTER CARE

Poor data quality

Slow data uploads

Slow/no 'thank you's'

Inability to segment

## DATA MANAGERS

Menial tasks

Maintenance costs

Inefficient processes

## ULTIMATE IMPACTS

▼ Retention rates

▼ Acquisition rates

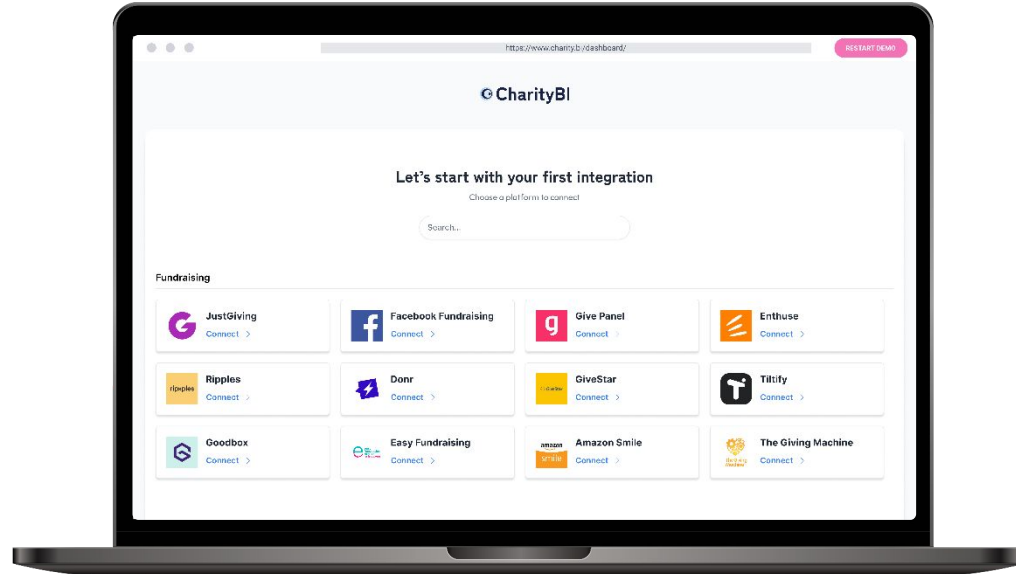
▼ Team morale

# CharityBI is an integration hub that streamlines data ingestion from platforms to your CRM



OUR SOLUTION

# Demonstration...



# 3 ways of getting the data into your CRM

## CSV

v1.0 STREAMLINE

Export a CSV of consolidated supporter data from connected platforms so you have just one CRM upload instead of several

- Live in Closed Beta

## API

v2.0 AUTOMATE

Connect to the CharityBI API and pull your consolidated supporter data from all connected platforms automatically.

- Coming soon

## Direct CRM Integration

v3.0 TRANSFORM

Connect CharityBI to your CRM, map fields, set logic and push supporter data automatically without any coding.

- In Development

BENEFITS

# The impact of data fragmentation and how CharityBI helps

FUNDRAISERS

Wasted time

Lack of data trust

Human error

Automation

SUPPORTER CARE

Poor data quality

Slow data uploads

Slow/no 'thank you's'

Inability to segment

Automation

Daily refresh

Data availability

DATA MANAGERS

Menial tasks

Maintenance costs

Inefficient processes

Automation

Pipeline maintenance

Off-the-shelf solution

ULTIMATE IMPACTS

▲ Retention rates

▲ Acquisition rates

▲ Team morale



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## Join the waitlist

Exclusive signup link:

[www.charity.bi/fundraisingtech2023](https://www.charity.bi/fundraisingtech2023)

- Get early access and have your say
- Case studies
- Extended 30-day free, no-obligation trial

