

# Constituent Relationship Management Solution

## Scalable Donor Management and Fund Raising Solution

### Constituent Focus!

Oracle and eVerge Group have developed a scalable and affordable solution that allows you to enhance your constituent relationship focus using Oracle CRM Application Suite. Our solutions provide you with:

#### MARKETING SOLUTIONS

- Campaign Management
- Segmentation Management
- Event Management

#### MULTI CHANNEL FUND DEVELOPMENT / DONOR MANAGEMENT

- Comprehensive View of Donor
- Gift Planning / Planned Giving / Recurring Giving
- Complex Fund Management
- Non-cash Donation Management

#### CONSTITUENT MANAGEMENT

- Call Center
- Advanced Service

#### ADVANCED ANALYTICS

- Marketing
- Donation Performance / Scorecarding

#### REPORTING & DOCUMENT MANAGEMENT

- Receipting



*"The eVerge team has not only been experts at developing and implementing Siebel CRM, they have extensive experience implementing nonprofits with robust systems and understand how our needs and nomenclature are different than the for-profit space."*

**Dave Lyons**, Director – Information Technology, Baptist General Convention of Texas

For more information on our Constituent Management Solution, contact Joe Stevens on 972-741-7365 or at [stevensj@evergroup.com](mailto:stevensj@evergroup.com)

## Companies using Donor Management Solution

#### American Heart Association

**Donor & Affiliate Management with OBI EE** – Implemented multiple Siebel CRM (Marketing / Exchange Integration), Sales Analytics, OBI EE and custom data warehouse applications that have reduced the amount and complexity of AHA's manual processes while providing real-time integrated views of data for better decision making.

#### Kenneth Copeland Ministries

**Donor Management with OBI EE** – Partnered with KCM to implement Call Center, eSales, Marketing and Analytics to create a comprehensive solution that supports new outreach programs, efficiently handles complex correspondence and order processing, requires significantly less up-front training, offers more accurate reporting, and is maintainable by a smaller IT staff.

#### Baptist General Convention of Texas

**Affiliate Management with OBI EE** – Currently assisting the BGCT to retire their legacy Blackbaud platform and core applications, and will utilize the Siebel Sales, Service and Marketing modules to improve their connection and facilitation with their remote staff and member churches, while enabling them to more effectively reach and serve their local communities.

#### Campus Crusade for Christ

**Donor Management with OBI EE** – Currently assisting CCCi with the implementation of their "Connect & Care" platform powered by Siebel. They will leverage Sales, Service, Marketing and Enterprise Content Management to increase gifting, provide higher touch to constituents and drive efficiency, enabling them to "do more with less".

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# Donor Management Solution Benefits and Capabilities

BENEFIT / CAPABILITY	DETAIL
<p><b>Enables complete view of donors and potential donors</b></p>	<p>eVerge Group's Donor Management solution enables you to develop and maintain a complete view/history of each donor and potential donor (contacts, discussions, interactions). These piece parts are essentially uncoupled into a series of many-to-many relationships with linkages that enable you to identify and understand how each donor contributes and influences the contribution of others.</p>
<p><b>Integrates management of fundraising activities and events</b></p>	<p>The Marketing component of the solution provides you with tools that enable the integration of marketing / fundraising activities:</p> <ul style="list-style-type: none"> <li>• Segmentation of entire donor pool into program-specific segments</li> <li>• Event management – define logistics, people, breakout sessions, resources necessary, etc. – the application can define all activities within one manageable object, plus tie all marketing and response activities to that event</li> <li>• Tie product/premium sales to donations and marketing programs</li> <li>• Intelligent segmentation of donors using Oracle's OBIEE suite of projects</li> </ul>
<p><b>Supports unique donation management requirements</b></p>	<ul style="list-style-type: none"> <li>• Management of cash and non-cash donations (inheritance, property, etc.)</li> <li>• Designation Management – designation of contributions to specific funds</li> <li>• Management of recurring gifts (PCI compliant solutions – i.e. credit card processing)</li> <li>• Receipting – automation of receipt of donation</li> <li>• Giving summary report – generation of report sent to donors annually/semi-annually to notify them of their giving and for tax purposes</li> </ul>
<p><b>Integrates operational support capabilities</b></p>	<ul style="list-style-type: none"> <li>• Manage service-related issues (call center capabilities, follow up calls, etc.)</li> <li>• Provide inventory capabilities for premiums/products</li> <li>• Support of multi-org structure – capability to extend deployed solution across a multi-affiliate footprint</li> </ul>
<p><b>Integrates supporting systems and data quality</b></p>	<ul style="list-style-type: none"> <li>• Leveraging Siebel's robust integration technologies to integrate to both owned and third-party outsourced solutions</li> <li>• Systematic data quality tools inherent to the Siebel product set</li> </ul>