Unlock the Power of Raiser’s Edge for Non-Constituents

In today’s mobile and social world, new channels for engaging your supporters are coming available nearly every day. And just because someone volunteered at an event, subscribed to your newsletter, or regularly ‘likes’ your posts, you may not be ready to promote them to a Constituent in Raiser’s Edge (RE) or Raiser’s Edge NXT (RE NXT).

Doing so could add noise to your database and increase your record count. On the other hand, storing them in a separate spreadsheet (or not tracking them at all) limits your ability to manage the information needed to identify your top prospective donors, build meaningful relationships, and solicit contributions at the right time.

Part of a successful moves management strategy includes giving your prospects the most personal experience.

“We used List Management... and WOW! Our first 18,000-patient calling list imported in a few hours as Non-Constituents who are easily ‘promoted’ to Constituents during gift processing... LOVE. IT. Paid for itself already.”

KAREN BURLINGAME
Donor Systems Coordinator
MultiCare Health System
possible, which is contingent on having a current, accurate, and complete view of them. After all, you purchased RE as a CRM tool to develop and nurture relationships, not just track donations after they are made.

Omatic’s List Management solution allows you to unlock the power of RE/RE NXT for Non-Constituents by gradually adding information to a supporter’s record and building a history at every stage before promoting them to a Full-Constituent.

Armed with this rich historical data, you’re able to get a 360-degree view of Non-Constituents and fully understand what led to their donations in the first place.

With List Management, you can import a list from nearly any source, check to see if the individuals already exist in your database, and then decide whether you want to designate them as a new Constituent or a Non-Constituent.

**With List Management You Can:**

- Import acquisitions lists, contacts, and other supporters from any source.
- Check for duplicates and match Constituents against existing lists and donor records.
- Apply actions and streamline the management of Non-Constituents with flexible task sets and workflows.
- Track list members without creating Full-Constituent records.
- Promote individuals that meet specific criteria to Full-Constituents, or maintain as Non-Constituents until they give a gift.
- Identify top donors and determine the most effective next steps.