

FRIENDS DON'T LET FRIENDS USE EXCEL

by [Laura Huth](#), President & CEO and [Tim Newcomb](#), IT & CMS Specialist, [do good Consulting](#), © 2009

Imagine winning a Caribbean cruise. Brimming with excitement and suitcase in hand, you show up to the dock to claim your prize and realize in horror that the “cruise” you won is really in a rowboat. Imagine the labor involved in rowing yourself around the Caribbean to see the sights. Imagine all the limitations – where will you sleep? Eat?

How much nicer would life be if you won a real cruise – the kind with a big white boat, dancing, swimming pools, shuffleboard. You could relax and eat well, and not labor away needlessly to get where you wanted to go.

Now, for a quick Pop Quiz:

1. *My donor information is stored in one (or more!) Excel or Access-based spreadsheets. (Ugh!)*
2. *When I print out my donor information from Excel or Access, it prints on more than one single-sided page. (Yuck!)*
3. *If I had 60 seconds to print complete donor profiles on our 10 largest donors, I'd be paralyzed. (Yikes!)*

If you answered “yes” to any of these, it is imperative that you read on.

For too many organizations, their data management systems are akin to rowing around the ocean in a rowboat – far too much work for not much payback, and frankly, sometimes dangerous.

Much of the time, this ‘rowboat’ comes in the form of our old friend, Excel, or other similar “homegrown” type of systems, sometimes in Access. While Excel and Access certainly have their place for tracking information, the bottom line is that Excel was never designed to manage donor information (names, multiples gifts, event attendances, etc.) for nonprofit organizations. And custom-built programs like Access sound good, but when the volunteers or employees who have built them leave, too often those remaining are left scratching their heads.

As a result, using Excel or Access to manage such information exposes your organization to major inefficiencies and errors. While these sorts of systems might be effective for new and very small groups, those who plan to grow or have outgrown such a system must think about an upgrade to maintain their organization's sustainability.

What if we told you that your organization could actually acquire a cruise-liner database system for under \$2,000 and that in doing so, not only could you get a return on the investment, but also transform your organization into a well-oiled, successful fundraising machine? Reduce stress on yourself and staff, have better planned and managed special events, and even track volunteers, their positions, commitments, and more.

While urging you to instead consider this “cruise-liner” of databases – a Constituent Relationship Management (CRM) system – at a bit more of a cost, in the end, your organization is healthier (more organized), well-rested (not overworked), and well-fed (financially sound).

Sound too good to be true? Not at all.

A recent *do good* client told us that using their donor tracking system (a 20-year-old Excel spreadsheet with more tabs than he'd like to admit to), was akin to playing 52 Card Pick Up. “I



can't find a thing," he lamented. "What I would give to have a system that made sense, didn't take moving heaven and Earth to run a report, and actually saved time instead of costing time." (You know the scenario: one spreadsheet for annual gifts, another for the gala attendees, another for golf outing sponsorships, and yet another for volunteers.)

This client resorted to halting annual appeals because labels had become impossible to generate, he could see no future in a major gifts campaign due to a massive lack of information, and he didn't know a thing about his volunteer's activities or inclinations.

While any database is likely to have its limitations, using Excel or Access as your database if you have over 30 donors (and if you don't have over 30 donors, contact *do good* right away for fundraising help!), can quickly put your organization in a debilitating position, severely hamstringing fundraising efforts and volunteer coordination, and making event planning far more difficult than it needs to be.

The client is now investigating the benefits of CRM systems, in particular, [GiftWorks](#), a product of Mission Research.

So why is Excel or Access not the systems to use?

Excel and Access are what we call "flat" systems – ones that do not really provide enough flexibility or interaction to be useful as real databases (that's because really, they are spreadsheets). This is why our client can't find any of the information he needs. Twenty years ago, starting out with a handful of donors, this was a good idea, but now, with over 1,000 donors and 20 years of history, this system is laborious, error-ridden, slow, and frankly, wrong. While Excel and Access can be helpful in storing some data on a limited basis, information tracking problems can quickly catch up with you when donors make multiple donations in any year, when household members have different last names, system-builders leave, etc.

While transitioning 20 years of data into a new CRM system like [GiftWorks](#) takes time and money, the investment is most certainly worth it.

When you're able to more readily and at-a-glance access – and understand – information and statistics on your donors, volunteers, and event attendees for annual appeals, major gift prospects, volunteers, and special events, this puts you into a pro-active fundraising position, instead of the reactive fundraising position (like when you use a tracking system like Excel).

Think of it this way: having good information can earn you money, and having bad information can cost you money. What position do you want to be in? If you had a system that was easy-to-use and could help you make your money back in less than a year, how could anyone in your organization say no to such a purchase?

Don't let price be your guiding factor. While saving money is important to any nonprofit, think about the big picture: a savvy and easy-to-use new system can outweigh costs in a hurry when you are able to enhance donor communications, run meaningful reports, develop sound plans, and actually raise more money in the long run. Done right, a new CRM system, regardless of cost, pays for itself in the short-term.

When you look at it this way, it's hard to understand why you're still using Excel, right? Let *do good* help you make the transition to a CRM system like [GiftWorks](#) today. See for yourself: step out of the rowboat and onto the cruise-liner!