



Manage Your Relationships

2014 DDI User Group Meeting
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Serving those who serve others





DDI-Connect CRM

- ❑ Constituent RELATIONSHIP Management
- ❑ Account Information (AI) Codes
- ❑ Relationship Management
- ❑ Memos
- ❑ Reports



Relationship Management

- Knowing How Your Constituents Relate to Each Other
- Storing Relationship Information Opens Future Possibilities

The screenshot shows a software window titled "Codes Maintenance" with a menu bar containing "New", "Edit", "Delete", "Master list", "Export", and "Exit". Below the menu bar, the text "Relationship codes" is displayed. A table lists various relationship codes and their corresponding descriptions.

| Code / | Description |
|--------|-----------------|
| AUNT | Aunt |
| BRO | Brother |
| COUS | Cousin |
| DAU | Daughter |
| EMPR | Employer |
| ESTATE | Estate/Donor |
| FATH | Father |
| FOUN | Foundation |
| GRDA | Granddaughter |
| GRFA | Grandfather |
| GRMO | Grandmother |
| GROUP | Church Group |
| GRSO | Grandson |
| ILBR | Brother in law |
| ILDA | Daughter in law |
| ILFA | Father in law |
| ILMO | Mother in law |
| ILSI | Sister in law |
| ILSO | Son in law |
| MEMB | Church Member |
| MOTH | Mother |
| NEPH | Nephew |
| NIEC | Niece |
| OTHER | Other |
| SIS | Sister |
| SON | Son |
| SPOU | Spouse |
| UNCL | Uncle |



Memo Search

- The Memo Search utility allows you to search for and view memos associated with constituent records.

View Exit

Memo Search

Entry dt: to: Memo codes:

Origination: Amt value: to:

Category: Date value: to:

Entered by: Memo text:

Include deleted memos File name:

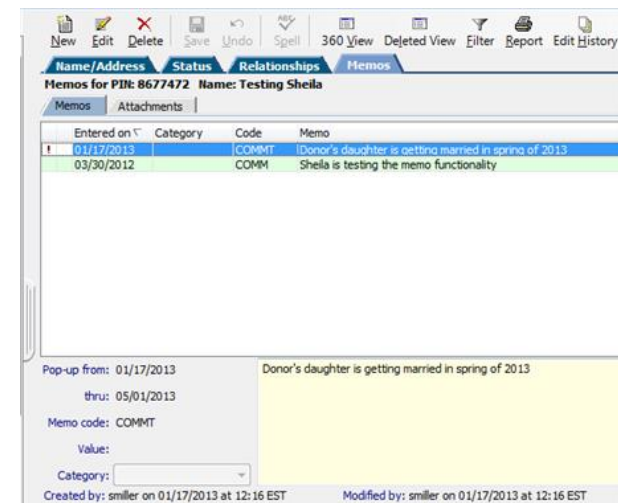
Searching... Clear File description:

| Record Description | Entry Dt | Memo Code | Category | # Attach | Entered By | Delete Dt | Memo |
|--------------------|----------|-----------|----------|----------|------------|-----------|------|
|--------------------|----------|-----------|----------|----------|------------|-----------|------|



Using Memos to Deepen Constituent Relationships

- ❑ Gather information and share across organization
- ❑ Use Urgent memos for important details
- ❑ Attach documents for quick/easy retrieval





Use the Information You've Gathered

□ Reports

- Constituent Detail Report (NA21)
- Constituency Development Report (NA77)
- Relationship Report (NA67)
- Memo Report (NA69)

□ Extracts

- Constituents near location
- Birthday cards
- Mailings



More than Just Numbers

- ❑ Does anyone have a CRM strategy?
- ❑ Does an effective CRM strategy take time?
- ❑ Does an effective CRM strategy take effort?

- ❑ Is it worth it?
 - **ABSOLUTELY**



Questions?



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