

# WIPFLI CONNECT FOR NONPROFITS

Grow Your Most Valuable Relationships



## All the Good Work You Do, in One Place

Your mission-driven organization can reach new heights with a constituent relationship management (CRM) tool. From building strong stakeholder relationships to managing membership and streamlining administration, CRMs give nonprofits the power to maximize their impact.

At its core, raising funds begins by raising relationships. With a CRM solution, you can segment and collaborate on communications between donors, volunteers, members and event attendees. Uncover raving fans and quiet contributors. Turn anonymous users and email subscribers into engaged advocates and mobilize your community.

Meanwhile, your team will spend less time on paperwork and more time making a difference. Gain efficiencies by streamlining approvals, vetting eligibility and reporting tasks. Plus, moving to a cloud-based CRM means you'll shore up data security, protecting your constituents as well as your legacy.

### Tools to do more:

- Collaborate and view interactions across constituent relationships
- Engage your volunteer base
- Manage programs and services
- Plan and execute events
- Track social case interactions and history
- Effectively onboard new leaders
- Scale to support new locations and programs
- Generate awareness and manage fundraising
- Gather volunteer availability and schedule resources

**Wipfli Connect**  
FOR NONPROFITS

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## Maximize your impact with Wipfli Connect for Nonprofits.



### Know Your Donors

Wipfli Connect provides a powerful platform to integrate stakeholder data and unlock actionable insights. Target your outreach and find out who might be ready for greater engagement.



### Integrate Fund Development Paths

Support multi-channel fundraising with tools for online and offline campaigns, events, major gifts, planned giving and capital campaigns.



### Engage Volunteers & Membership

Customize a portal to recruit and onboard volunteers, promote opportunities and coordinate signups. Track volunteer activity and automate communication directly from CRM. Plus, optimize the ability to schedule and mobilize your volunteer base and forecast upcoming capacity to effectively manage your events and programs.



### Maximize Event Impact

Track event expenses and sponsorships and link event participation across your database. Manage guest lists, auctions and pledges; assign volunteer tasks; and analyze your costs, performance and return on investment.



### Track Marketing Influence

Custom filtering helps increase the impact of your outreach across mail, email, text and social media. Wipfli Connect for Nonprofits integrates with your email marketing platform and Dynamics 365 Marketing as well as social accounts.



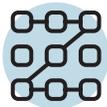
### Simplify Administration

Save time and break down data silos by centralizing reporting and accounting activities into one integrated system. Integrate with your financial system to automate receipts, pledge reminders, processing and reporting.



### Safeguard Data

With one centralized data source, your organization can maintain reliable backups and secure data against accidental or malicious loss. Permission sets simplify the user experience and restrict data to the appropriate users.



### Manage Programs and Services

Track applications, recommend offerings based on profile interactions and report on program effectiveness.

With over 80 years of experience working with nonprofit organizations, Wipfli is committed to helping you further your mission. Leverage technology and our experienced specialists to meet your goals and help ensure the longevity of your organization.

## Let's get started.

For more information about Wipfli Connect for Nonprofits, visit [wipfli.com/wipfliconnect](http://wipfli.com/wipfliconnect)

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