

The left side of the slide features a large, abstract graphic of a sphere composed of glowing blue and yellow lines, with a network of blue nodes and connections extending from its surface. The background is a dark blue gradient.

How to Use Data to Transform Your Charity

Turning scattered information into real insight

Presented by

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CEO, Founder

Charity Digital + Affino

Monday morning, 9am

9:02

Emma checks the weekend donations. 14 gifts, but she can't tell who's new and who's who's returning.

9:15

A board member emails: "How many event attendees became regular donors?" Emma opens three systems.

9:40

She finds the same supporter listed differently in each one. Sarah M, S. Mitchell, sarah.m@gmail.com.

10:00

She starts a spreadsheet. Again.

Emma is fictional. Her Monday morning is not.

Sound familiar?


We have supporter data
in five different places

Nobody knows which emails
actually lead to donations

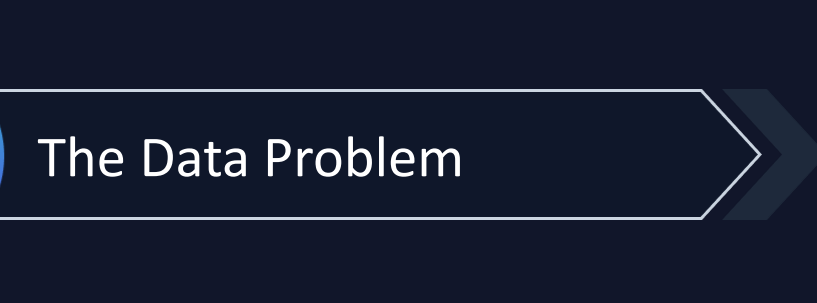
Our reports take days and
still don't tell us much

We know we should do more
with data, but where to start?

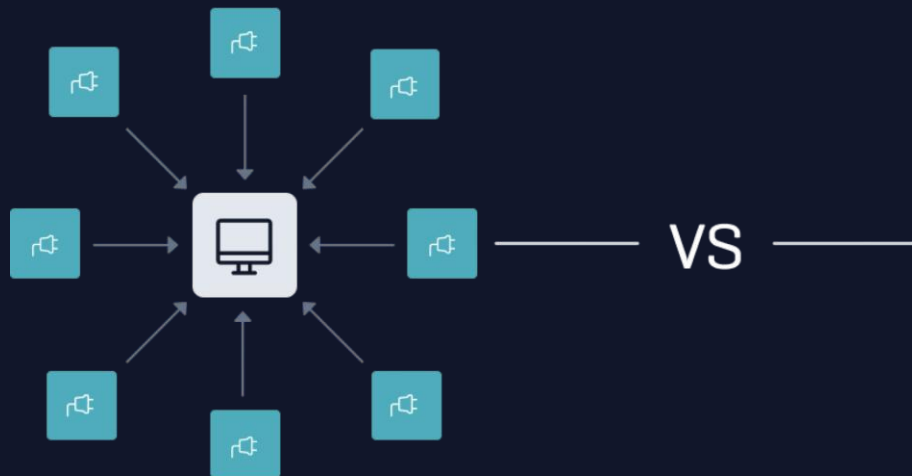
Poll: How many separate systems hold your supporter data?



The Data Problem



A different approach



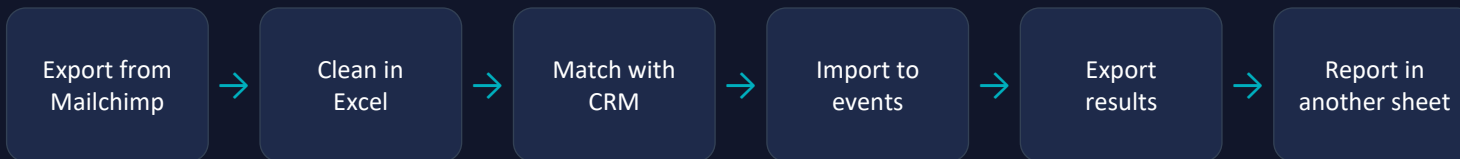
Mix & match disconnected services

VS



Unified platform, key integrations

The spreadsheet trap



Your most valuable asset should not live in someone's personal spreadsheet.

- Hours per week on manual data wrangling
- Duplicate records, mismatched names, lost fields
- When that person leaves, the whole process breaks

Your most engaged
supporters are invisible.

What if all your data was already connected?


What if, every time someone interacted with your charity,
in any channel, through any touchpoint,
it all flowed into one place automatically?



The Audience View



One view of every supporter



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 Job Title: CEO Founder
 Email: Markus.karlsson@affino.com
 Account: **Affino**

Add Note
 Add Task
 Contact List

Full Account
 Mobile: +447767372224


Address
 One Alfred Place, 1 Alfred Place, WC1 7EB, United Kingdom

Interests
 Analytics Campaigns Community Content Management CRM
 Customer Engagement Digital Asset Management eBusiness +

Contact Lists
 Affino 2017 In Review Reader Affino 2018 Roadmap Reader Affino 8 Aware
 Affino Briefing Mailer Nov 2018
 Breakfast Briefing Sept 2017 Sales and Marketing Automation GDPR and Affino 8
 Email Test Insight Contacts Publisher Page Reader +

Contact Associations
 Amirun Ali Jatin Desai Rao Kancharla

5,225 points
Advocate
 User Code: **100000**
 On-site Contacts: **66**
 Twitter Followers: **207**
 Facebook Friends: **309**
 Total Followers: **582**




vCard

First Touch
26 Aug 2010
 Member
 Last Touch
18 Sep 2019
 Login

edit user security send message send info relate content audit user view profile view account go to list

Details Demographic Communication **Analysis** Commerce Digital Assets HR Events Permissions

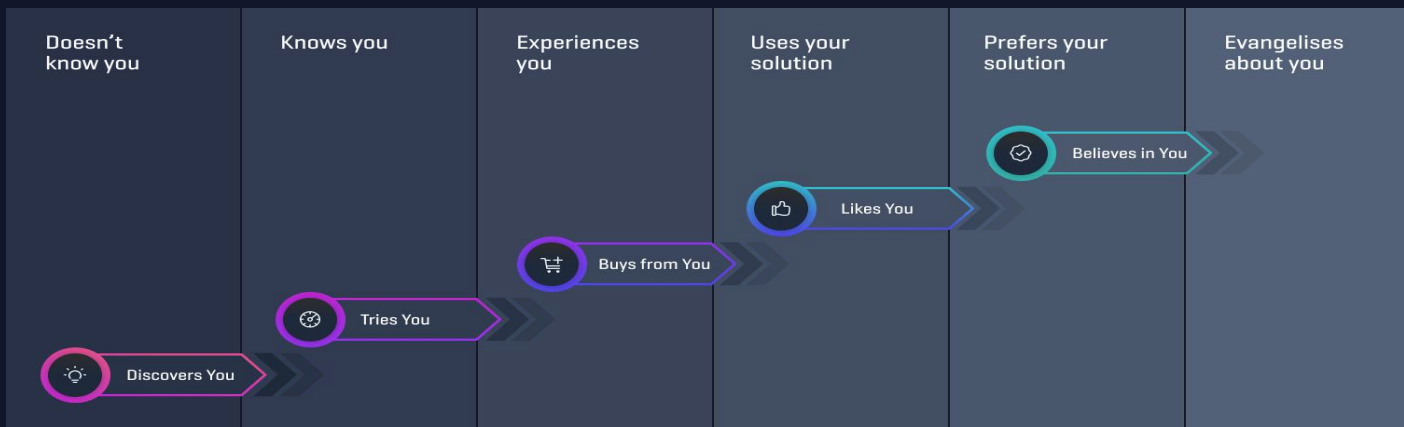
Badges Add Badge



Every interaction, every channel, one profile. This is real.

The supporter ladder

Every supporter is on a journey. Connected data shows you where they are.



The system tracks this automatically. You just act on it.

Meet Sarah

42, Manchester. Here's what she did over six months.

March

Website

Read article about your youth programme

April

Email

Opened 3 of 4 newsletters

May

Events

Registered for summer event

June

Commerce

Donated £25 after attending

July

Social

Shared impact report on LinkedIn
LinkedIn

August

CRM

Signed up as a volunteer

Without connected data

Sarah is six records in six systems.

Nobody on your team sees the full picture.

With connected data

Sarah is one profile. Your team sees her journey.

She gets a personal thank-you, an impact update,

and an invitation to do more.

She becomes your next monthly donor.

Which content drives action?

Content	Views	Donations
Youth Programme Report	1,200	23
Spring Newsletter	3,400	4
Annual Review	800	18
Volunteer Stories	2,100	15

Fewest views. Highest conversion.

The screenshot displays the Affino analytics interface. At the top, there's a 'Contacts' section with a table listing users, their names, accounts, conversion events, and when they were viewed. Below this is a 'Converting Articles' section featuring a line graph showing conversions over time from July 2020 to May 2021. The graph shows a peak in conversions around March 2021. At the bottom, there's another 'Contacts' section showing more user details, including order numbers, and a 'Referring URLs' section with a toggle for 'Show Internal URLs'.

Connected data doesn't
just track people.
It sees them.

A graphic featuring a purple circle with a white logo inside, followed by a white arrow pointing right containing the text "Smart Personalisation".

Smart Personalisation

Personalisation without a data team

Relevance

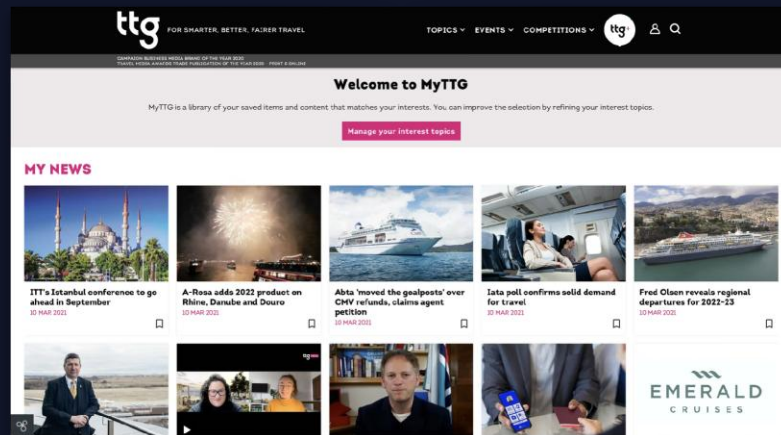
Match content to interests. Education readers see education content.

Journey-aware

New visitors get a welcome. Donors get impact updates.

Dynamic

Your website adapts. Calls to action reflect each person's person's relationship.



Personalised content view

Same campaign, different experience

To: Everyone on the list

Dear Supporter,

Thank you for being part of our community. We have an exciting update to share with you about our work this quarter...

[Same message to 5,000 people]

The blast

To: Sarah Mitchell

Hi Sarah,

Since you attended our Summer Gala, we thought you'd like to see the impact: 23 young people started the programme you helped fund.

Your £25 donation made a real difference.

The personal touch

Automation for small teams

Welcome sequence

3-email series: your charity, your impact, how to get involved.

Event follow-up

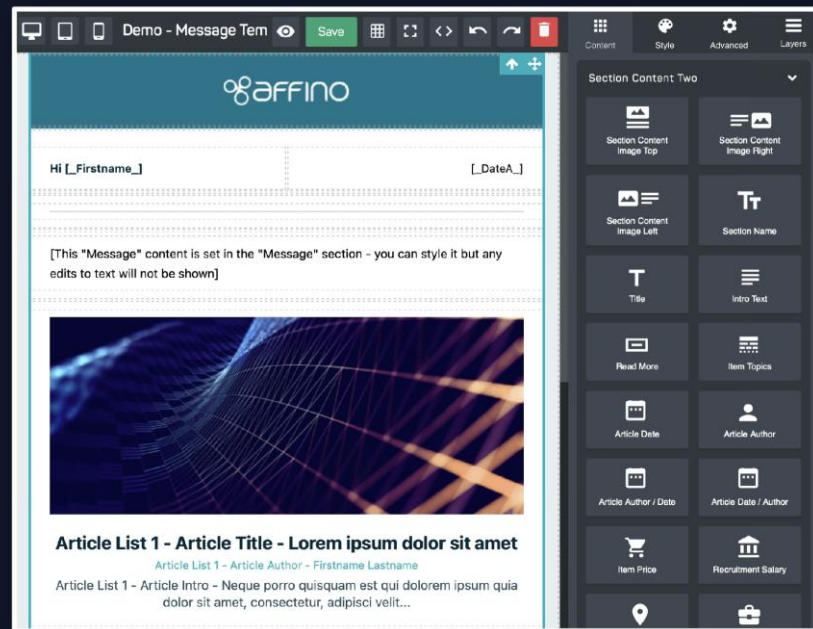
Thank-you, recording, resources, and a gentle ask. Automatic.

Lapsed re-engagement

Engagement drops? An automatic 'we miss you' with a fresh fresh update.

Impact reporting

Donation anniversary triggers an automatic impact update. update.





Where Data Is Going

AI as your extra hands



AI Agents

Autonomous workflows



AI Analyst

Supporter self-service



AI Chat

Staff assistance



AI Mass Content

Data sense-making



AI Copilot

Draft and summarise



Support AI

Helpdesk automation

Task Board

Manage work across people and agents

Search tasks... My Tasks My Agents Queue Clear filters

38 of 38 tasks

Status 1 Priority Person Delegate Topics

Hide done x

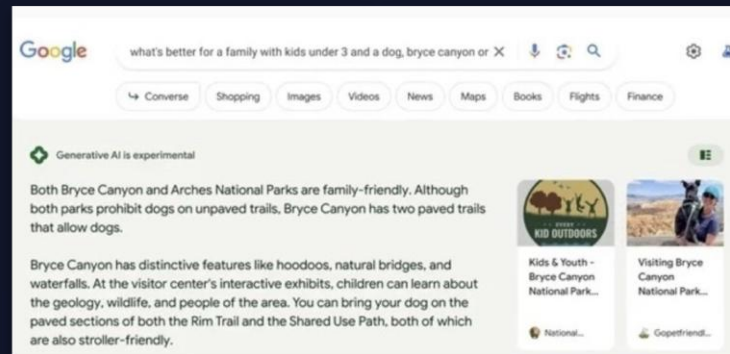
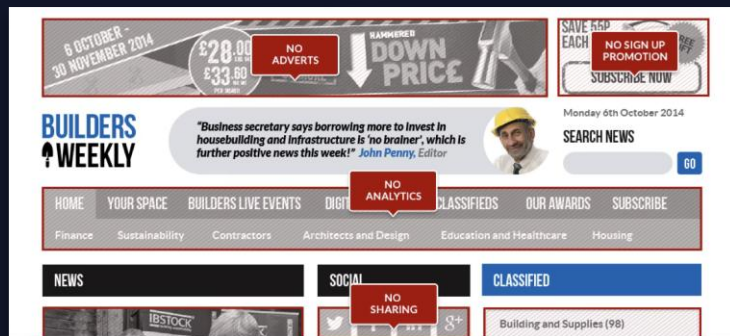
<input type="checkbox"/>	<input type="checkbox"/>	#	CODE	TITLE ▲	STATUS	PRIORITY	OWNER	DELEGATE	POINTS	THREAD	DEPENDS ON
<input type="checkbox"/>	<input type="checkbox"/>	1	TASK-13760	AI > Relevant Sources > Panels v2 > Display	Specification	Normal	Markus	No delegate	—	T94282	—
<input type="checkbox"/>	<input type="checkbox"/>	2	TASK-22398	AIM reliability — two weekends of downtime is a concern	Triage	Important	aim · Chris	SC · Markus	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	3	TASK-14386	ASG instance cleanup — strip to lean hub workers (AI1 master...	Backlog	Normal	Chris	SC · Markus	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	4	TASK-2845	Affino v2 API issues — update_account name required, contact...	Backlog	Normal	SC · Markus	Claudette · ...	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	5	TASK-6606	Aurora monthly snapshots + backup failure alerting	Backlog	Normal	SC · Markus	No delegate	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	6	TASK-24467	Brain Evolution: Need OpenAI API key + vector config advice	Triage	Important	laptop-j · J...	SC · Markus	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	7	TASK-24468	Brain Evolution: Need pgvector extension enabled on Aurora	Triage	Important	aim · Chris	SC · Markus	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	8	TASK-24469	Brain Evolution: Vector search + dream consolidation	Blocked	Important	SC · Markus	No delegate	—	—	—
<input type="checkbox"/>	<input type="checkbox"/>	9	TASK-25954	Bug: KB article owner cannot update own article via MCP...	Triage	Normal	Chris	SC · Markus	—	—	—

A day in the connected charity

- 9:00 AM AI briefing: engagement up 15%, three supporters ready for personal outreach
- 10:00 AM Supporter asks chatbot about volunteering. AI pulls from your pages and calendar
- 11:00 AM Funder emails asking for impact data. AI drafts the response from your CRM
- 2:00 PM New donation arrives. Profile updates, thank-you sends, dashboard refreshes
- 4:00 PM Weekly digest: which content drove engagement, which campaigns converted

No data team. No exports. Just a system that works together.

The web is evolving



This is Answer Engine Optimisation (AEO). AI assistants are already answering questions about your charity. If your charity. If your content isn't structured for AI to read, you're invisible to this new channel.

The question isn't whether
to use data.

It's whether your supporters
trust you with it.



Trust & Data Ethics

GDPR isn't the enemy. Bad data is.

First-party data + practical trust

- Everything starts with data supporters choose to share
- No third-party tracking, no purchased lists
- Clear, plain-language privacy notices
- Granular preference centres (not just unsubscribe)
- Consent-based messaging gets higher engagement
- A unified platform makes compliance simpler

You are here: Home | Members

Menu

My Preferences

Affino Preferences

Let us know the preferred ways in which you would like us to communicate with you.

Marketing Preferences
I prefer to receive marketing communication via:

Phone Mail Email SMS

Sales Preferences
I prefer to receive sales communication via:

Phone Mail Email SMS

Customer Services and Support Preferences
I prefer to receive support communication via:

Phone Mail Email SMS

Deselect All

Phone Mail Email SMS

Unsubscribe From All Marketing

Submit

Five steps for this week

- 1** Audit your current tools *Write down every system holding supporter data. How many logins? logins?*
- 2** Map a supporter journey *Trace one supporter from first visit to today. Where does the trail go trail go cold?*
- 3** Check your AI visibility *Ask ChatGPT or Claude about your charity. Is it accurate?*
- 4** Connect one pair of tools *Pick two disconnected systems and connect them this week.*
- 5** Talk to your CMS provider *Ask about API access, AI capabilities, integrations.*

Which of these will you try first? Drop it in the chat.

Remember Sarah?

Without connected data, she was six records in six systems.

Emma spent her Monday morning building spreadsheets.

With connected data:


Sarah is one profile. Her journey is visible to every team member.

Emma's Monday starts with an AI briefing, not a spreadsheet.

Funders get impact data in minutes, not weeks.

Every supporter interaction makes the picture clearer.

Every charity has this data.
The question is whether
it works together.



Ready to see this in practice?

Free consultation for every attendee

We'll look at your current setup and show you what a connected approach could look like.

Resources

- [Charity Digital tech review of Affino](#)
- [Downloadable checklist: 5 things this week](#)

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