Apteco

How charities can unlock more value from their CRM

CHARITY DIGITAL



James Alty, Apteco
Founder and MD

In this webinar:

- How you can use CRM data for better targeting, deeper insight and faster campaign activation with a CRM marketing companion
- How to unlock supporter insights with just 3 privacy safe data points with Instant Insights

Calls are muted, please ask questions in the Q&A panel.



Turn data into impact with a CRM marketing companion

Better targeting, deeper insight
and faster campaign activation

Chances are you already rely on a...

Customer Relationship Management tool

AKA: Supporter database, donor management system, donation platform, fundraising system, constituent relationship management ...



The CRM reality

Used effectively, CRM platforms can:

- **Increase sales productivity by 34%**
- **Improve sales performance by 29%**

That's why the global CRM market is projected to exceed **$260 billion** by 2032.



It's great news for sales teams. But marketing & fundraising teams often need more.

The marketing challenge

Supporter experience has changed. Supporters now expect:



Relevant communications



Personalised experiences



Consistent messaging



Fast, timely engagement

Live poll

Do you have a CRM or equivalent?

1. Yes, I use it for data selection & targeting
2. Yes, I use it for segmentation & insight
3. Yes, I use it for personalisation
4. Yes, I use it for campaign journey activation
5. No
6. I don’t know

Many teams struggle using CRM data and systems alone.

Why?

Because CRM systems were designed to manage relationships, not to power modern marketing.

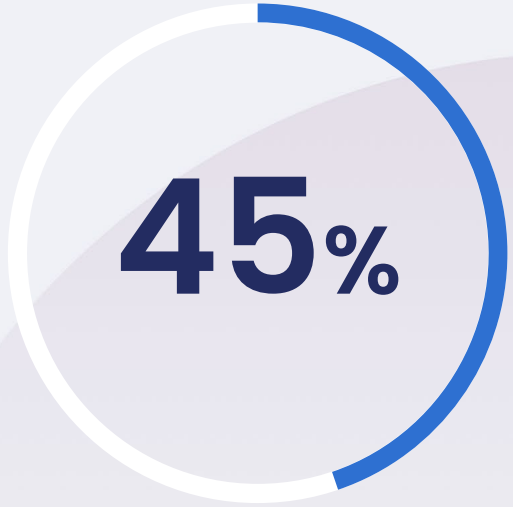
What marketers are telling us



of CRM users are dissatisfied with their platform



cite data silos as a major challenge



say complexity slows adoption and frustrates teams

Source: Business Info Magazine and Marketing Week

Marketers & fundraisers need:

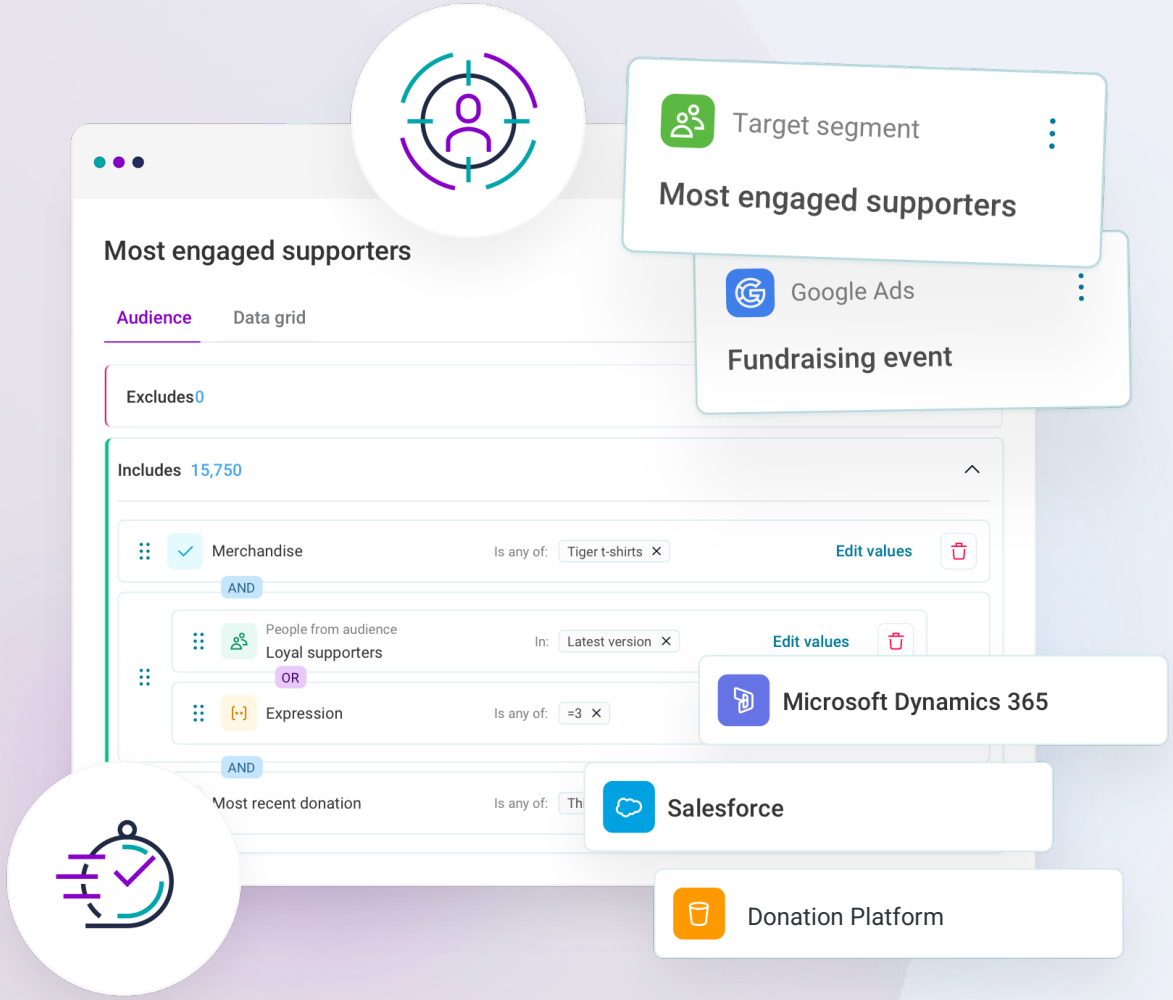
- Access to data
- Transaction history
- Engagement signals
- Campaign response data
- Behavioural insight
- Real-time audience intelligence

When data is fragmented, campaigns slow down.

When insight takes too long, opportunities are missed.

When segmentation is limited, messages become generic.

What is a CRM marketing companion?



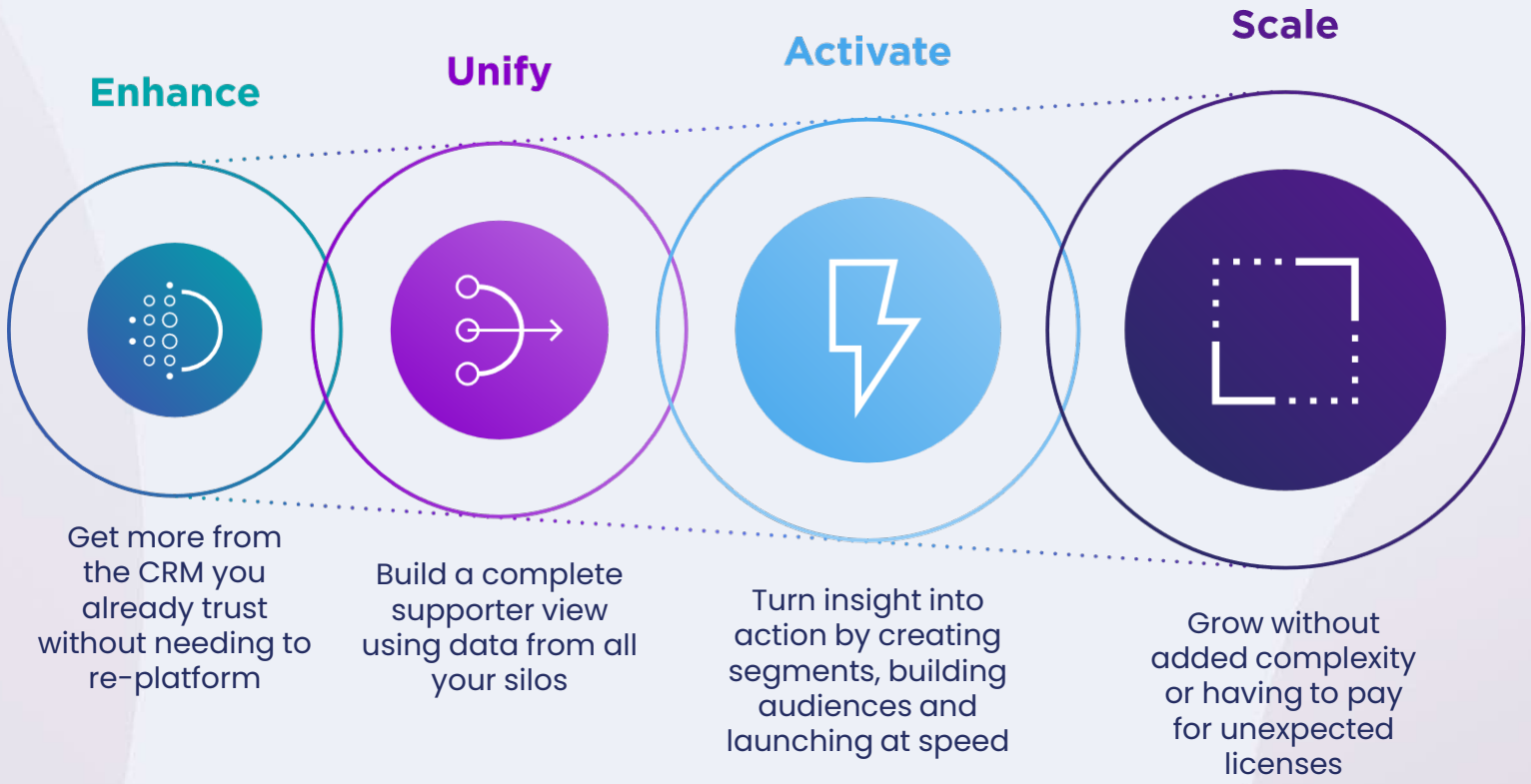
A CRM marketing companion works alongside your existing CRM and provides the tools marketers & fundraisers actually need.

It doesn't replace your CRM. It makes it smarter, helping you to:

- Connect all your supporter data silos
- Create a complete supporter view
- Build powerful audiences
- Activate campaigns faster
- Measure performance more accurately

How does it work?

A CRM marketing companion focuses on four key areas:



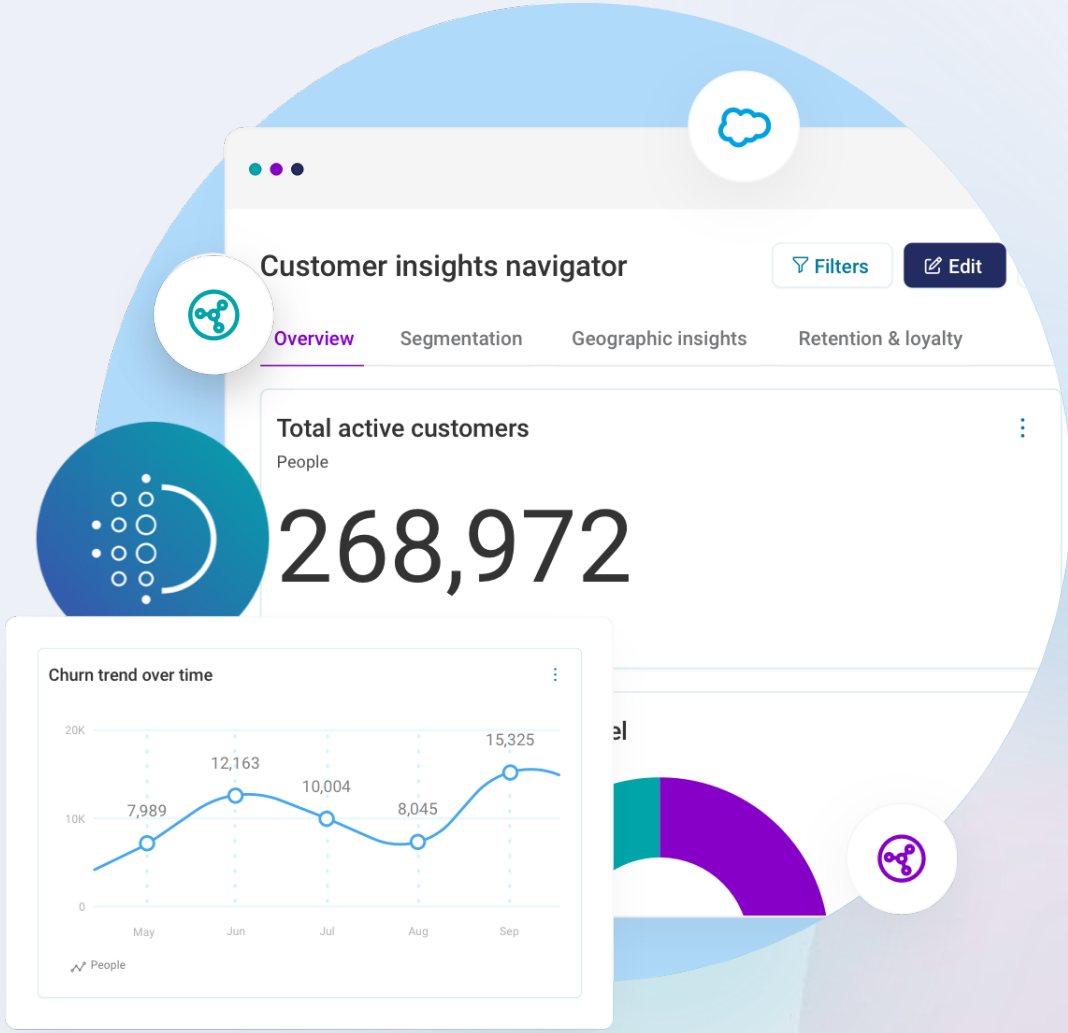
Enhance

Supercharge the CRM you already trust

Add marketing specific capability – like deeper analytics, more flexible segmentation, and faster campaign execution - without disrupting existing workflows.

This means you can:

- Keep CRM as your system of record
- Add advanced marketing intelligence
- Avoid major system change
- Access full communications history
- Analyse transaction data



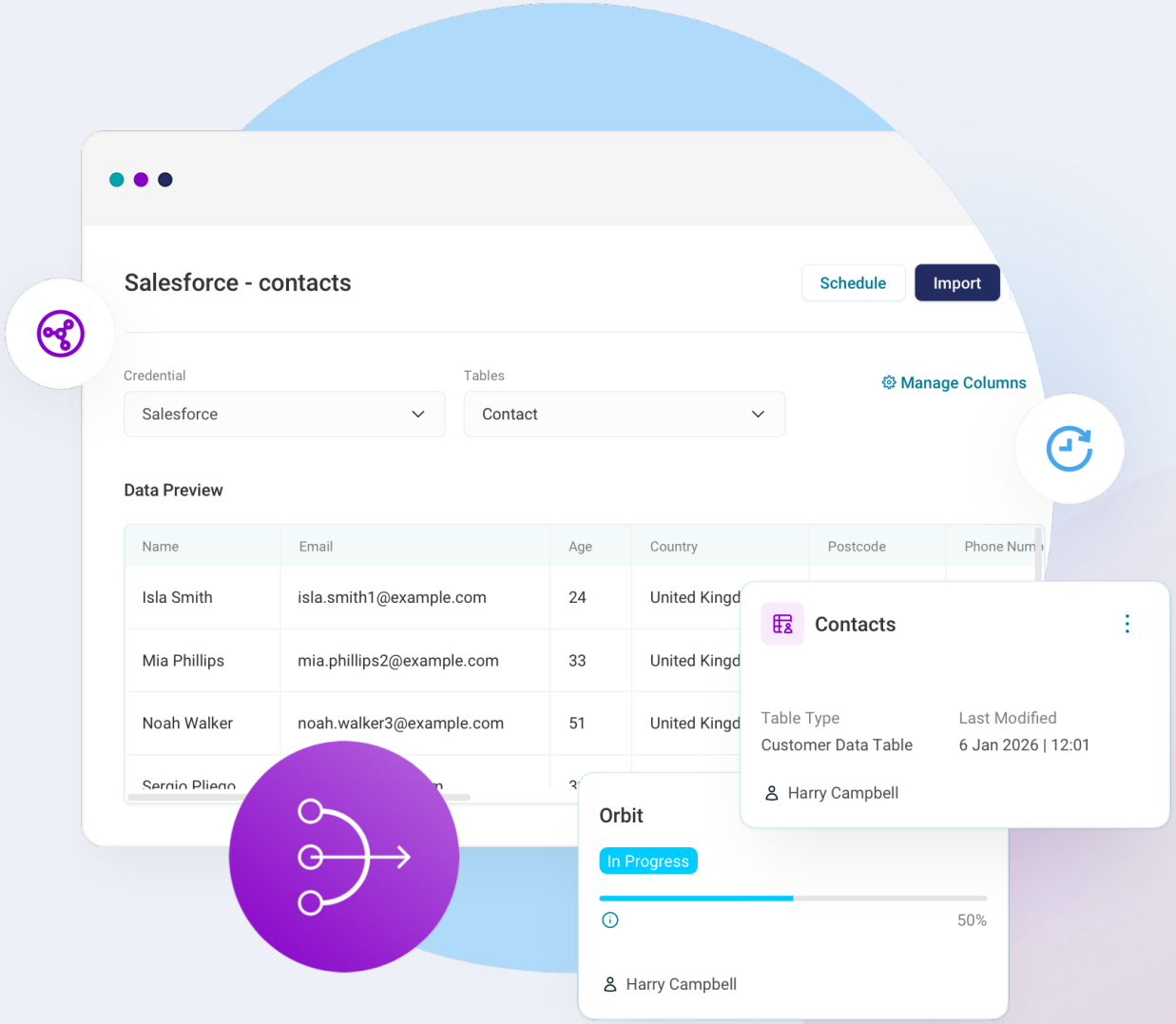
Unify

Turn CRM data into a true marketing view

Bring your supporter data sources together – donations, legacies, committed giving, events, lotteries, web behaviour, response and engagement signals – using built-in identity resolution and unified supporter profiles.

This means you can:

- Combine CRM data with other sources
- Use automated updates and data refreshes
- Access pre-built dashboards
- Remove reliance on manual reporting
- See the full picture



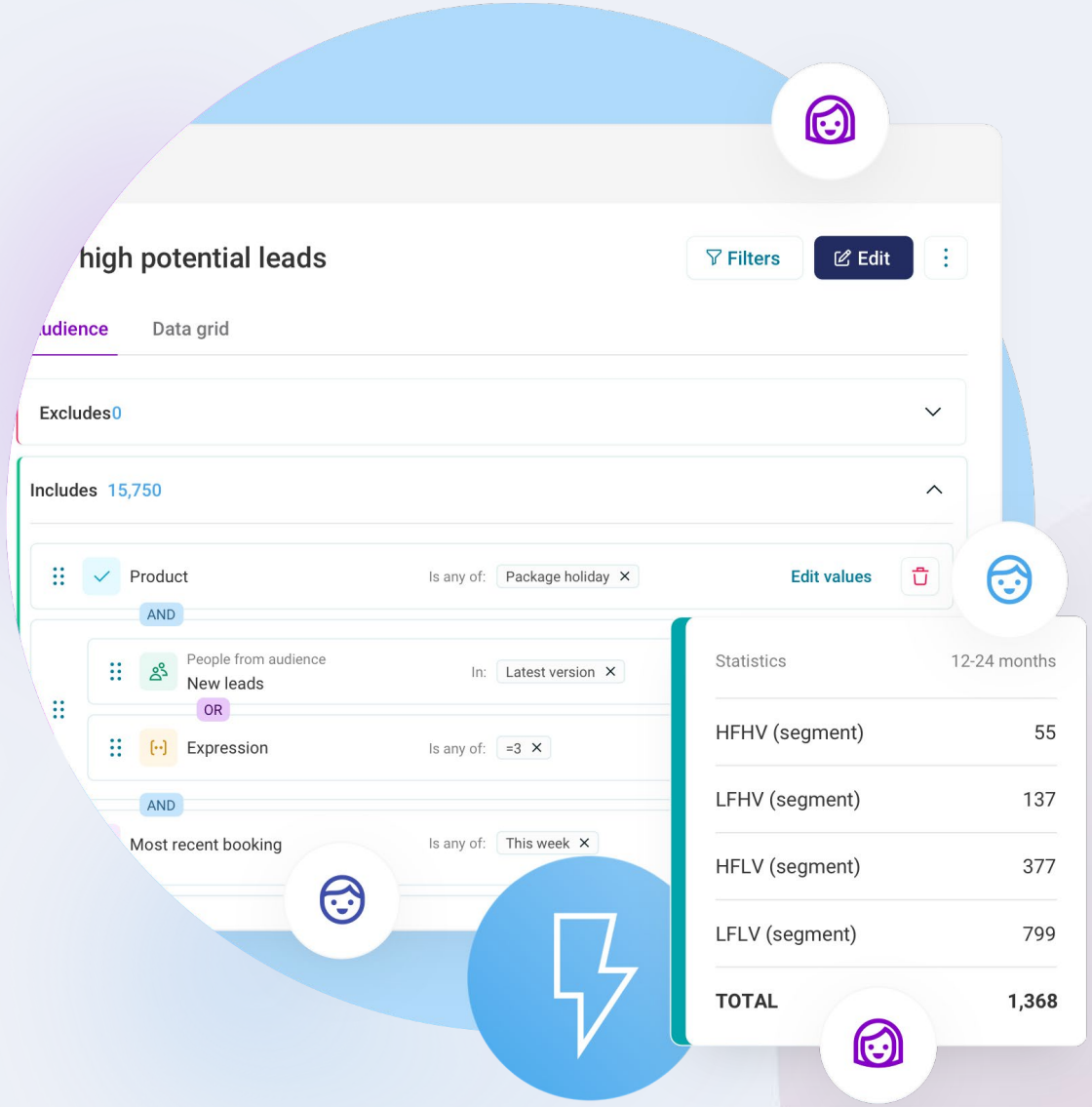
Activate

Build and deploy smarter campaigns

A CRM marketing companion enables charity marketers to turn data into meaningful insights and unlock precision targeting to boost support for your cause.

This means you can:

- Build powerful audiences without code
- Create scores, models, profiles and clusters
- Identify high-propensity segments
- Write audiences back into your CRM
- Trigger journeys across traditional and digital channels



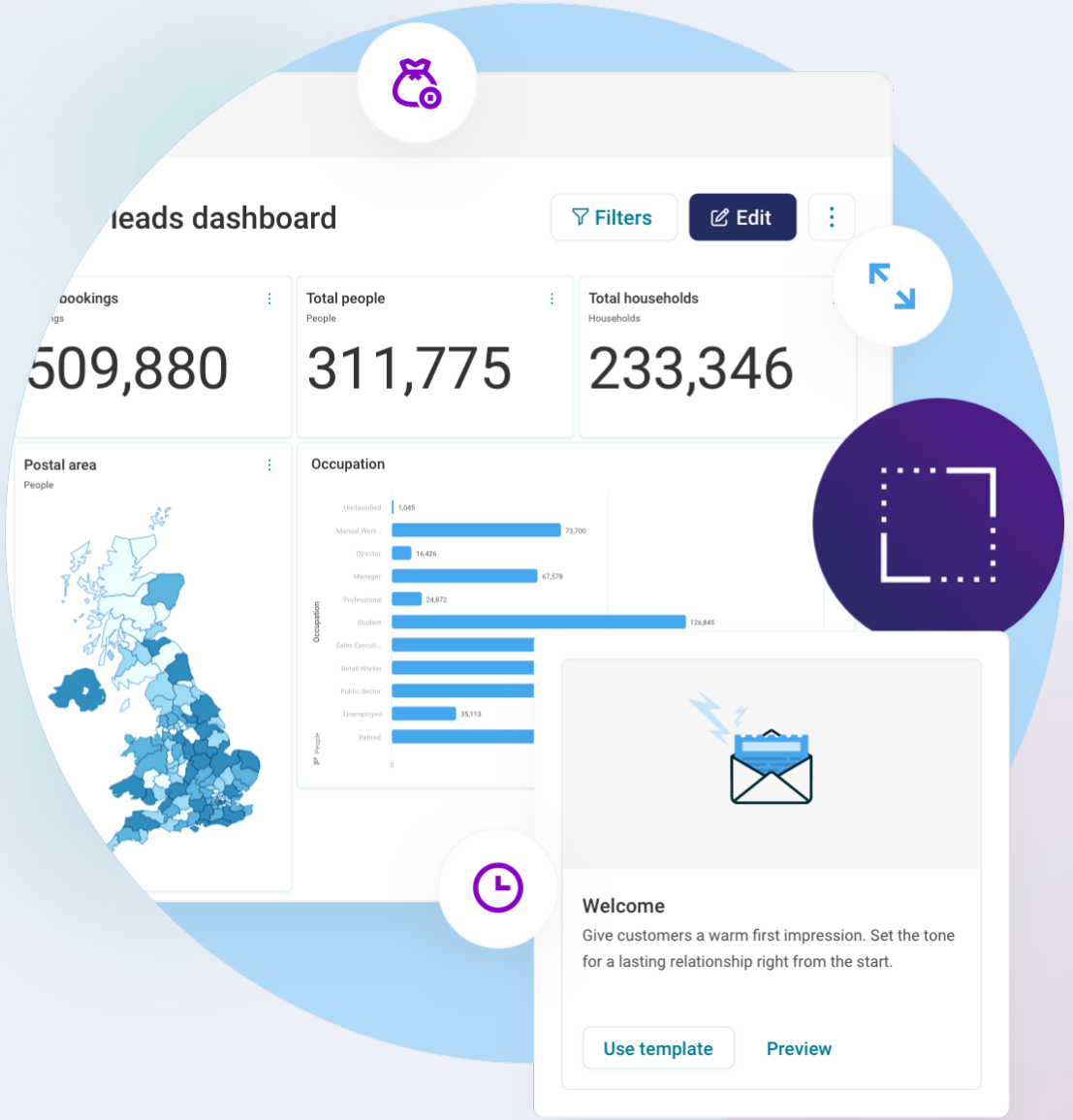
Scale

Reduce cost and risk

System upgrades can be expensive, complex and resource-intensive. Even then, they may not provide you with the capabilities needed to deliver successful marketing campaigns.

Using a CRM marketing companion means you can:

- Lower the total cost of ownership
- Implement faster
- Deploy flexible models
- Avoid large-scale CRM disruption
- Benefit from ready-to-go data models, dashboards and templates



The benefits of a CRM marketing companion



Better targeting & stronger engagement



A clearer view of your supporters



Faster campaign activation



Lower cost and reduced risk



Independence for fundraising teams



Alignment across the organisation

Who benefits?

A CRM marketing companion creates value across the entire organisation.



Fundraisers & supporter communications

- Faster campaign delivery
- More relevant targeting
- Better engagement
- More independence



Marketing director & CMOs

- Stronger ROI
- Clearer insight
- Improved fundraising performance



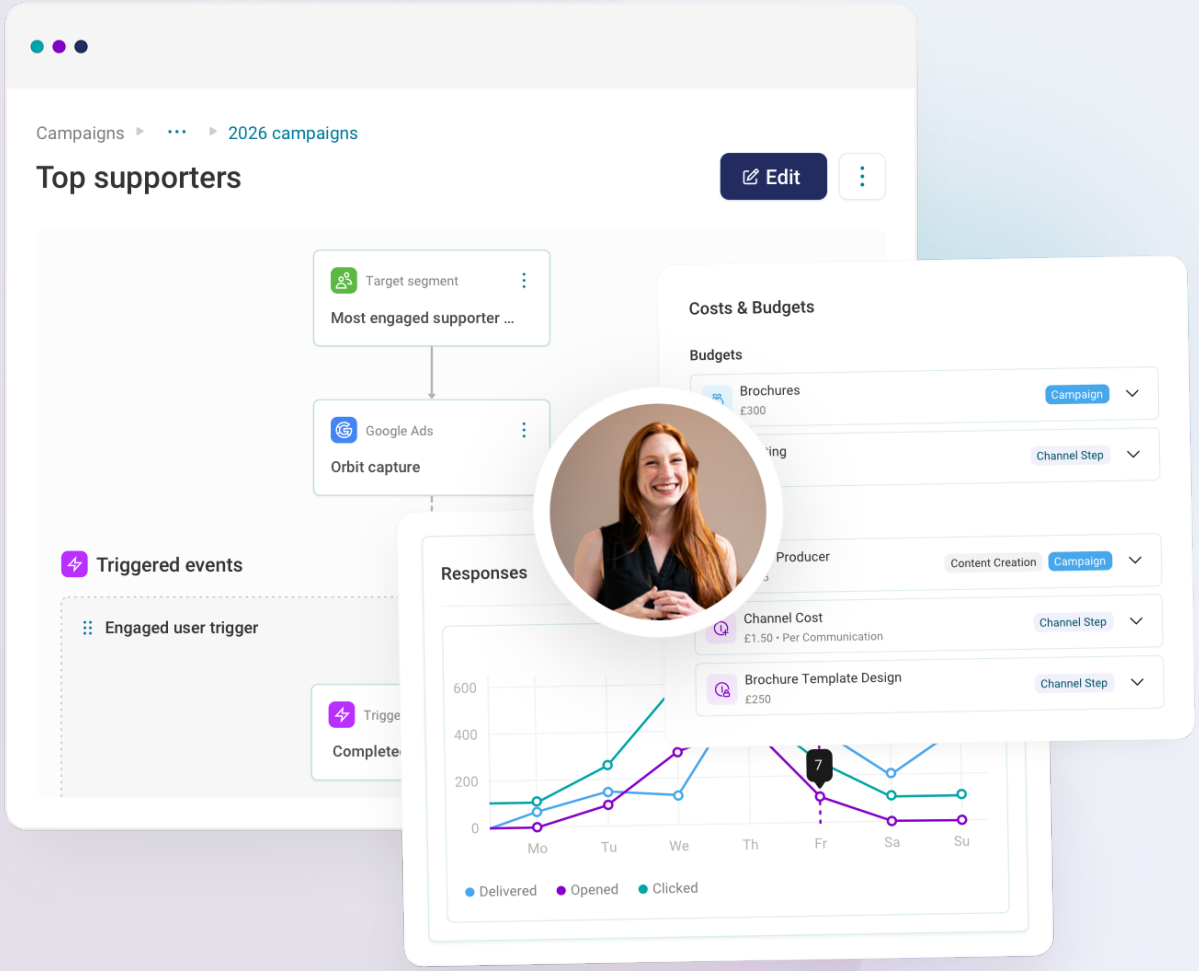
Supporter engagement & insight

- Cleaner, more consistent supporter view
- Reduced support for marketing
- Automated updates and write-back to CRM



Finance teams & trustees

- Lower platform costs
- Reduced operational complexity
- Better return on technology investment



Why choose the CRM marketing companion approach

- Build unlimited audiences
- Create interactive dashboards
- Share insight across teams
- Access complete communications history
- Analyse supporter transactional data
- Write audiences and scores back into CRM
- Launch campaigns faster

Keep the CRM you trust. Unlock the fundraising power you need.

Charity sector case study: VSO

Challenge:

VSO previously held supporter and volunteer data across multiple platforms, often with overlapping records.

The solution:

To create a Single Supporter View (SSV) by integrating three key systems.

The result:

The resulting SSV layer enabled structured, deduplicated data to flow into Apteco, significantly enhancing its power and usability and enabling selection, modelling, and journey orchestration on a clean, person-level universe.



The impact

The implementation of a single supporter view enabled greater automation of supporter communications and unlocked capacity to deliver messages with better timing, targeting and relevance

Strategic enabler

Apteco has become the strategic backbone of VSO's supporter engagement and fundraising activity

Optimisation and innovation

VSO now have an intelligent, scalable supporter marketing ecosystem, with Apteco at its core

Multi-team collaboration

Apteco is used collaboratively by the fundraising, digital and data teams

Significant efficiencies

Reduced briefing cycles, reduced laborious checking and quality control and fostered a more data-led culture

Improved ROI

Both Apteco email and SMS are now priority channels. With SMS campaigns achieving net-positive ROI, even in test phase

Scan to read the full case study

Live poll

What are the biggest challenges with your CRM?

1. I can’t create targeted data selections myself
2. I can’t share data and insights with my colleagues
3. It takes too long to launch campaigns
4. I can’t analyse or select on donation history etc
5. It doesn’t hold communication history for analysis
6. I don’t have a complete supporter view
7. None of the above
8. I don’t know

FREE EGUIDE

Get the CRM marketing companion guide for the full picture.



INSTANT INSIGHTS
FOR CHARITIES

Unlock privacy safe supporter insights

INSTANTLY

Using just 3 data elements Instant Insights is a privacy safe multi-tabbed dashboard designed specifically for charities.

With just three data fields:

1. supporter ID
2. donation date
3. donation amount

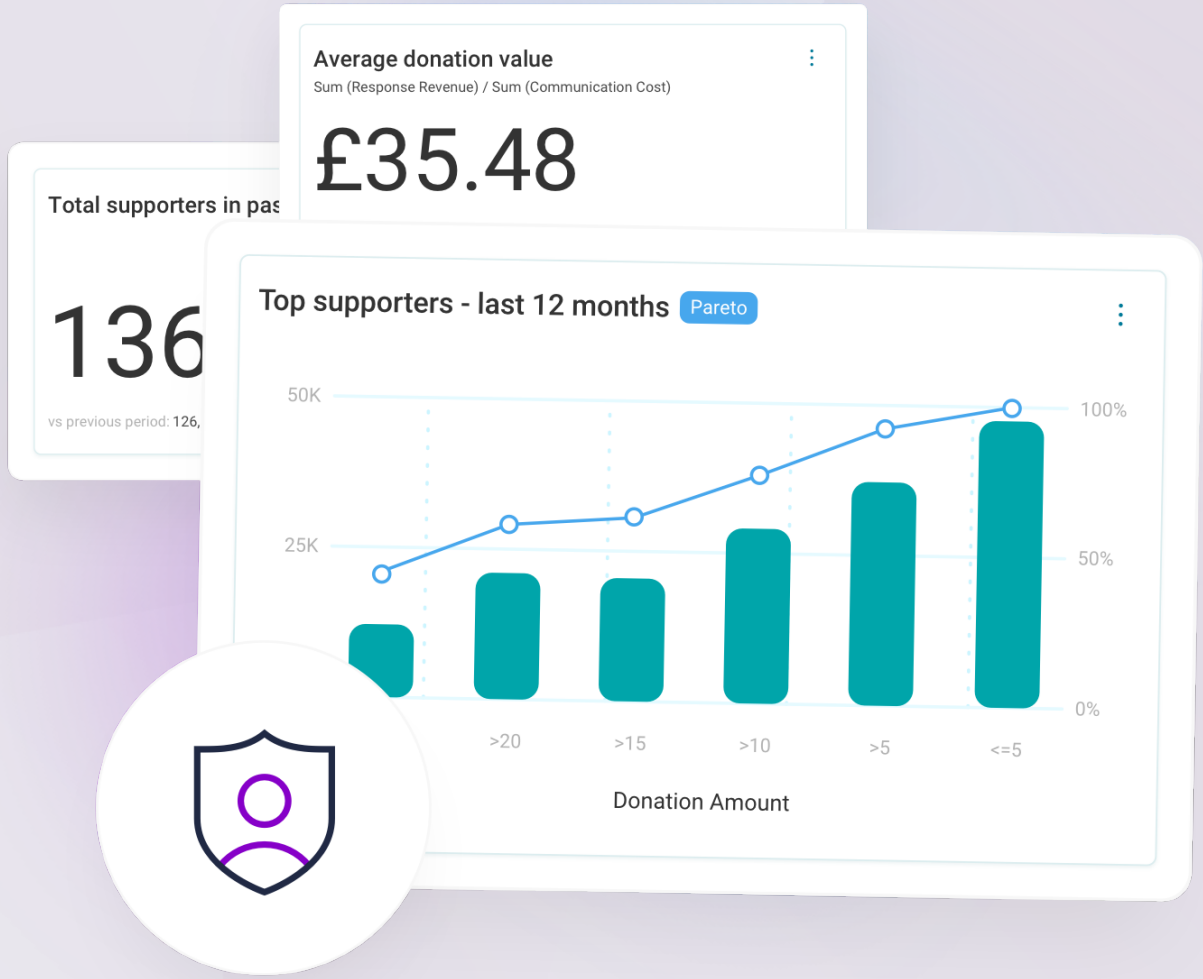
Instant Insights turns your supporter data into clear, practical insights.

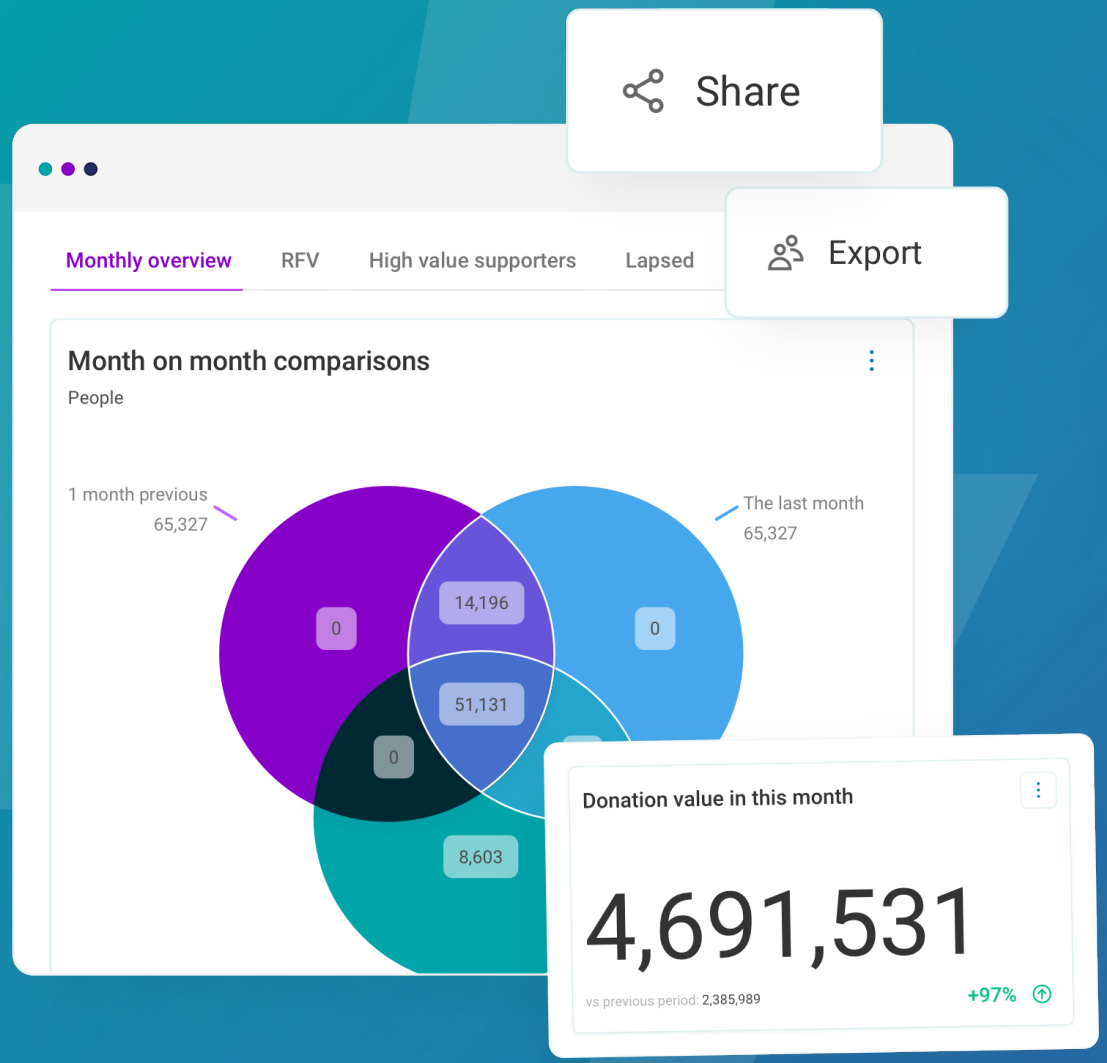


No personal information.
No technical headaches.
No long implementation process.

INSTANT INSIGHTS
FOR CHARITIES

The dashboard is delivered ready to use, with visual tiles built for the charity sector, highlighting supporter giving patterns and potential fundraising opportunities right away.





INSTANT INSIGHTS
FOR CHARITIES

Everything is organised into easy-to-navigate tabs, each offering a different lens on your data so you can explore supporter behaviour from multiple angles.



Act on insights instantly – ready to use dashboard within 24 hours.



Understand donation value and trends over time.



Focus your resources where they matter most to maximise impact.



Build precise, insight-driven lists that drive results.



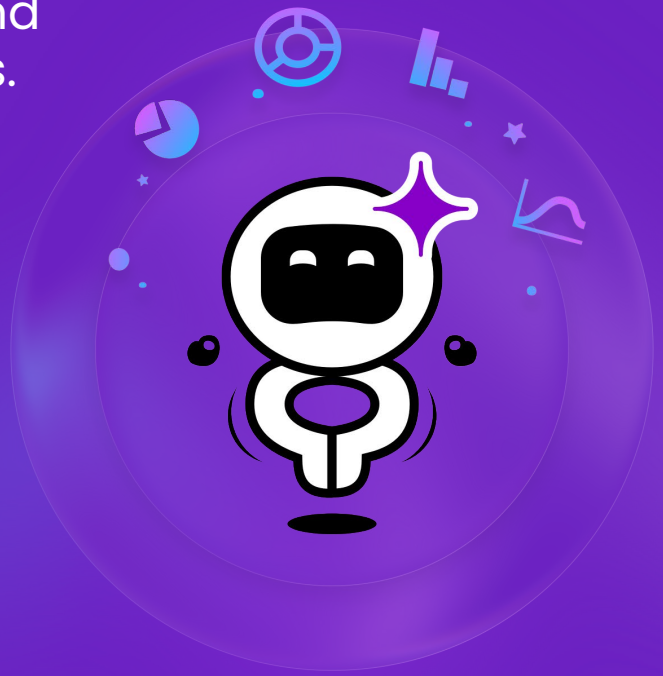
Protect supporter privacy with full GDPR compliance.

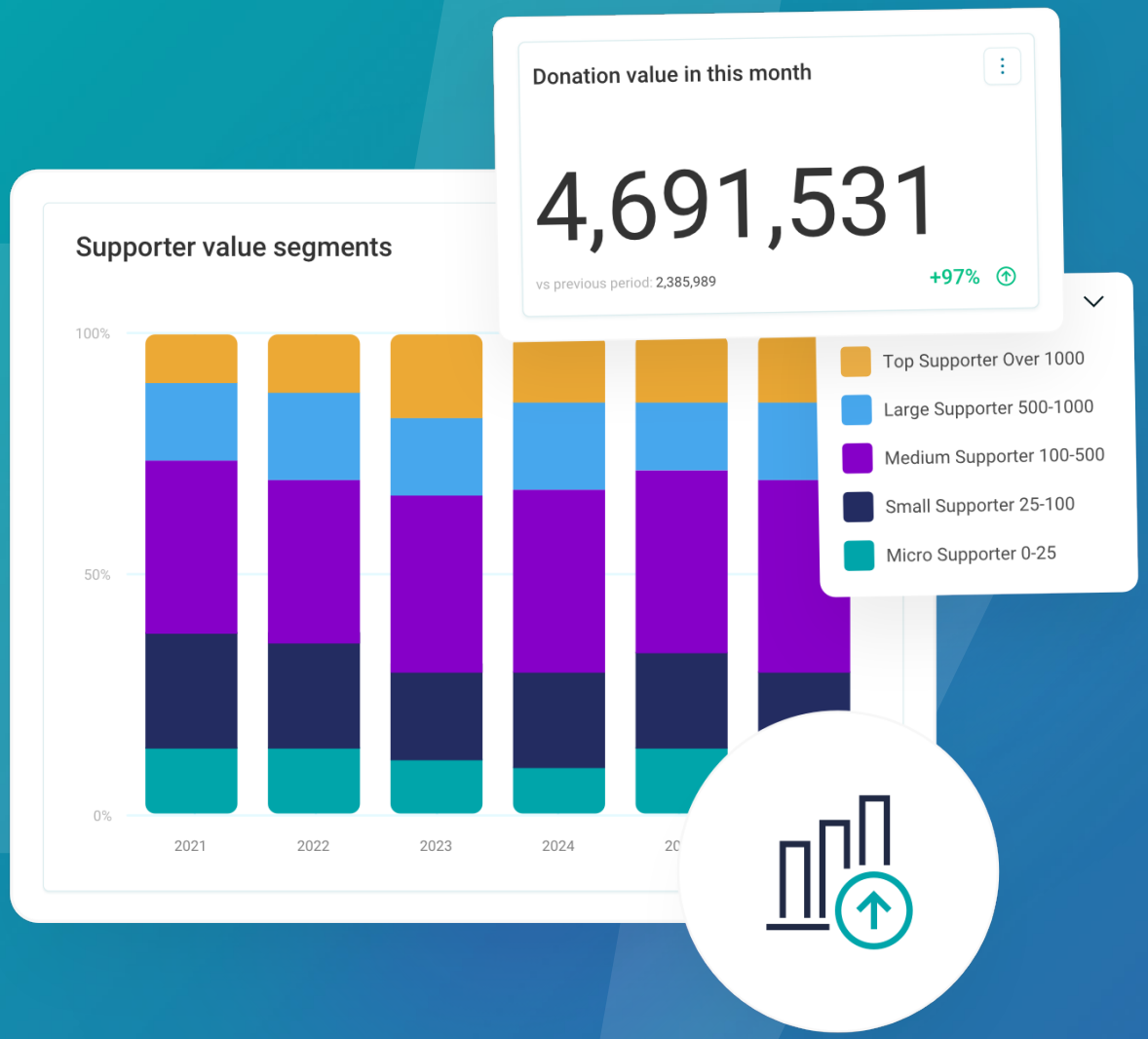


Cost-effective and ready to use from day one.

Instant Insights also includes access to Orin, Apteco's AI assistant.

Available on every tab, Orin quickly summarises what the data is telling you and helps to guide you through the dashboard whenever you need a hand interpreting or navigating the insights.





INSTANT INSIGHTS
FOR CHARITIES

Pre-populated tiles reveal key insights such as:

- Segment movement
- Monthly, quarterly & annual comparisons
- RFV
- Return on investment
- Top & lapsed supporters

Integrated Data Export

Instantly export supporter IDs and create highly targeted, insight-led lists for your next campaign or fundraising activity.

With immediate access to the right audiences, you can sharpen your targeting, act faster, and drive stronger engagement.

INSTANT INSIGHTS
FOR CHARITIES

Live demo

LEARN MORE

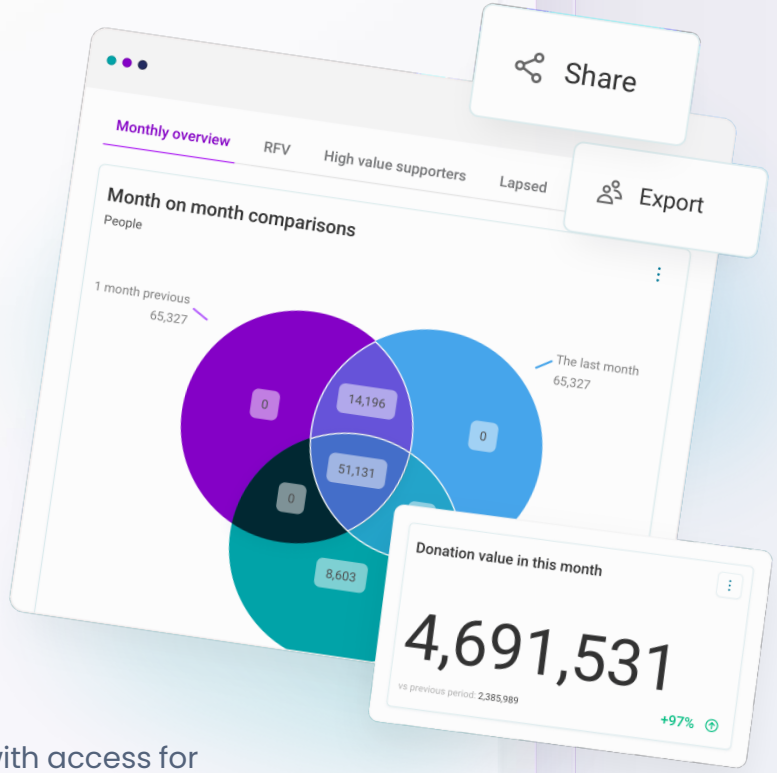
INSTANT INSIGHTS

FOR CHARITIES

Live poll

Your chance to win an Instant Insights dashboard!

1. Yes, please enter me in the draw
2. No thanks, I don't need Instant Insights



NB Prize is an Apteco Instant Insights dashboard with a single data load, with access for full 2 weeks for 1 user with data export capability. The user can share with colleagues.

Key takeaways



CRM marketing companion technology works alongside your existing CRM



A CRM marketing companion creates value across the entire organisation



Unlock more value from your data with a CRM marketing companion



Instant Insights is a privacy safe multi-tabbed dashboard designed specifically for charities



Teams can act on insights immediately. No integrations, no learning curve, no hidden costs

Q&A

INSTANT INSIGHTS
FOR CHARITIES

Download free
CRM marketing
companion eguide



Apteco

INSIGHT INTO ACTION



Apteco

INSIGHT INTO ACTION



Explore:

- Supporters and donations by year
- Total unique supporters
- Donations by year
- Total donation value, number of gifts, and average donation
- Supporter value segments
- Age of relationship (segment movement)
- Data grids

Complete data overview

Start with a complete data overview to understand the overall picture of your supporter base. This tab brings together total volumes across the full period of your data, giving you a clear, high-level view of overall performance.

Apply filters across the entire dashboard, making it easy to focus on specific groups or timeframes, and most visuals (with the exception of number cards) are interactive too, so you can click directly into the data and refine your analysis in seconds.

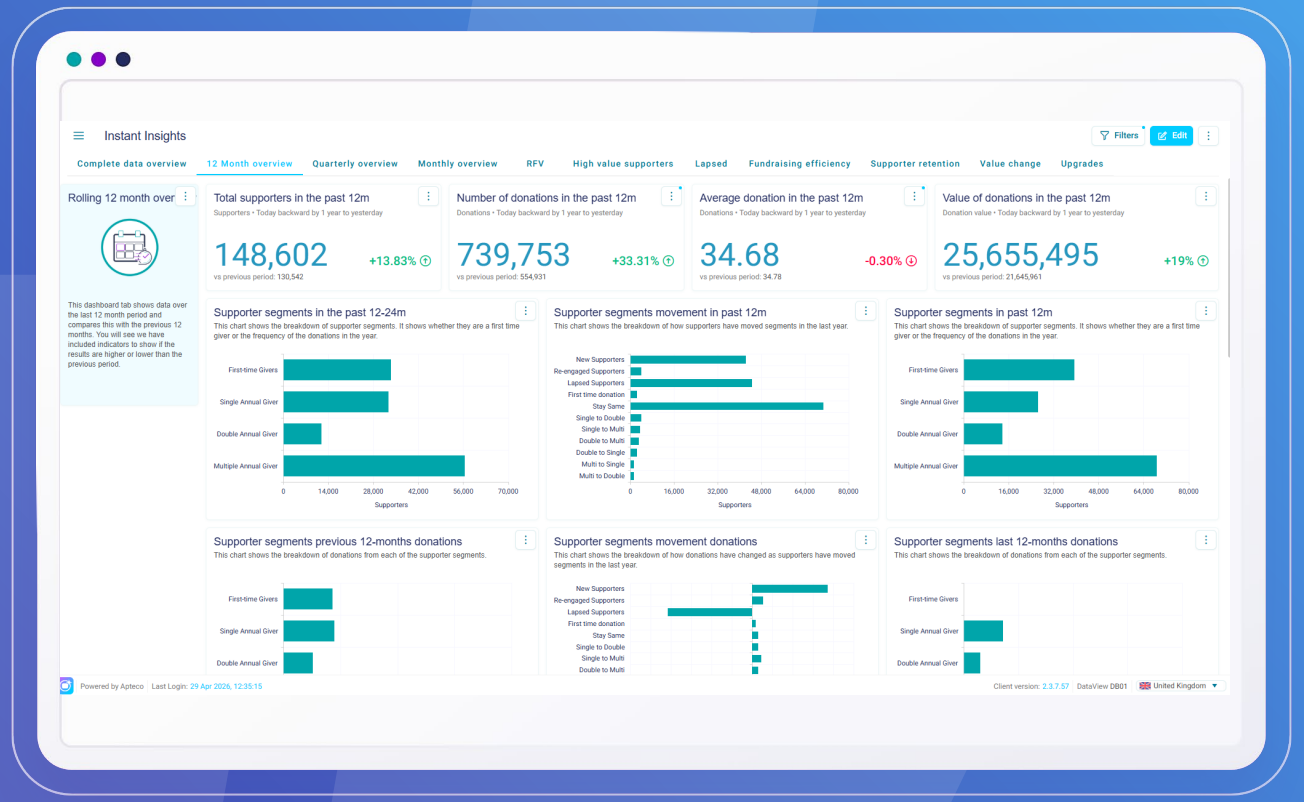
Together, these insights give you a strong foundation - helping you quickly assess performance, spot trends, and decide where to focus your fundraising efforts next.

12-month, quarterly & monthly overviews

Understand how your fundraising performs over time with dedicated 12-month, quarterly, and monthly views. These tabs help you quickly spot trends, seasonality, and shifts in performance - so you can see not just what's happening, but when and why.

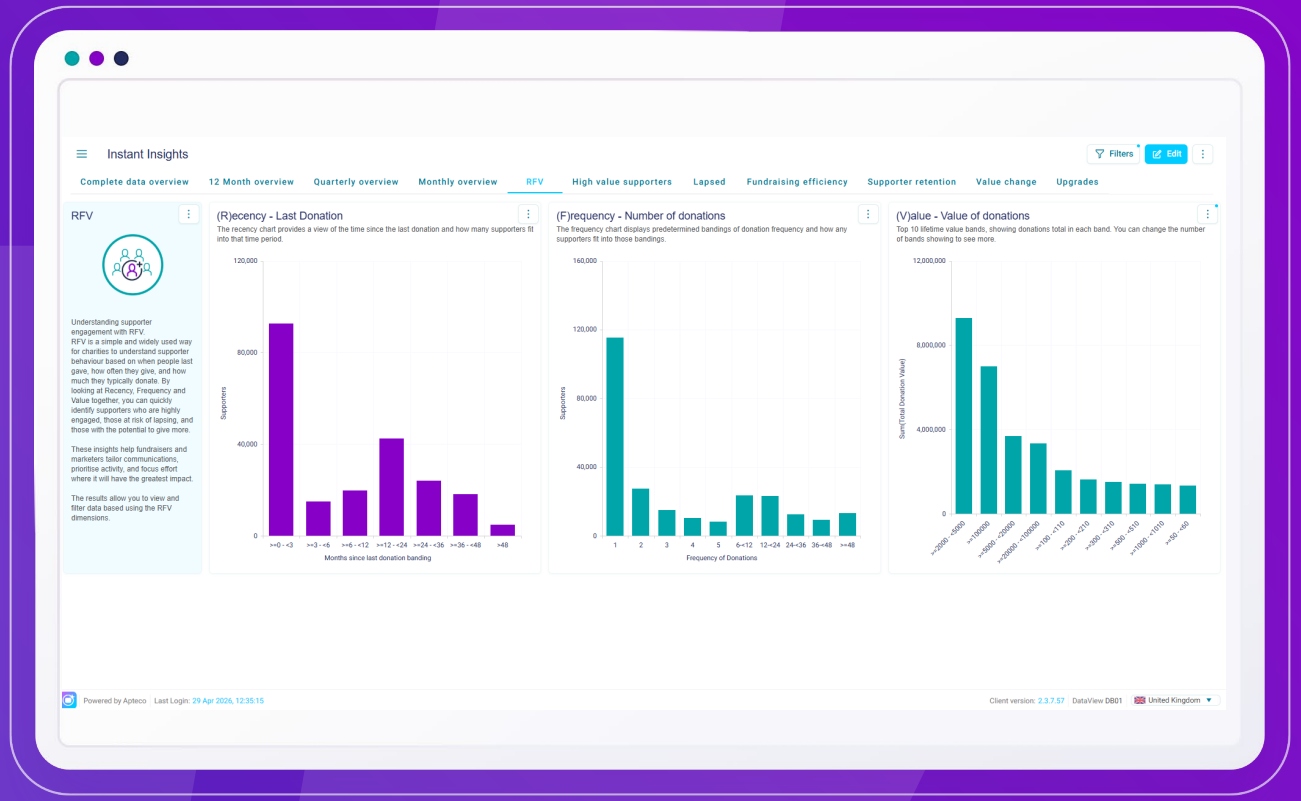
Each view shows donation volumes and total income for the most recent period, alongside a comparison to the previous one. Clear indicators highlight whether performance is up or down, making it easy to track progress at a glance and respond quickly to changes.

These insights help you plan more effectively - pinpointing peak giving periods, identifying seasonal opportunities, and highlighting where performance may need attention.



Explore:

- Supporters in the selected period
- Donation amounts (average, lowest, highest)
- Year-on-year comparisons
- First and last donation timing



Explore:

- Recency - last donation
- Frequency - number of donations
- Value of donations – view supporters across lifetime value bands

RFV (Recency, Frequency, Value)

RFV analysis gives you a powerful, practical way to understand supporter behaviour and prioritise your fundraising efforts. By looking at when supporters last donated, how often they give, and how much they contribute, you can quickly identify your most engaged supporters, those at risk of lapsing, and those with the potential to give more.

This approach helps you move beyond one-size-fits-all campaigns, allowing you to tailor communications, focus your resources, and maximise impact where it matters most.

These insights make it easier to prioritise activity - whether that's nurturing loyal supporters, re-engaging those at risk, or identifying individuals with the potential to give more over time.

High value supporters

Identify and nurture your most important relationships with a dedicated view of your highest-value supporters. This tab helps you understand where your income is really coming from, so you can focus your time and effort on the individuals who drive the greatest impact.

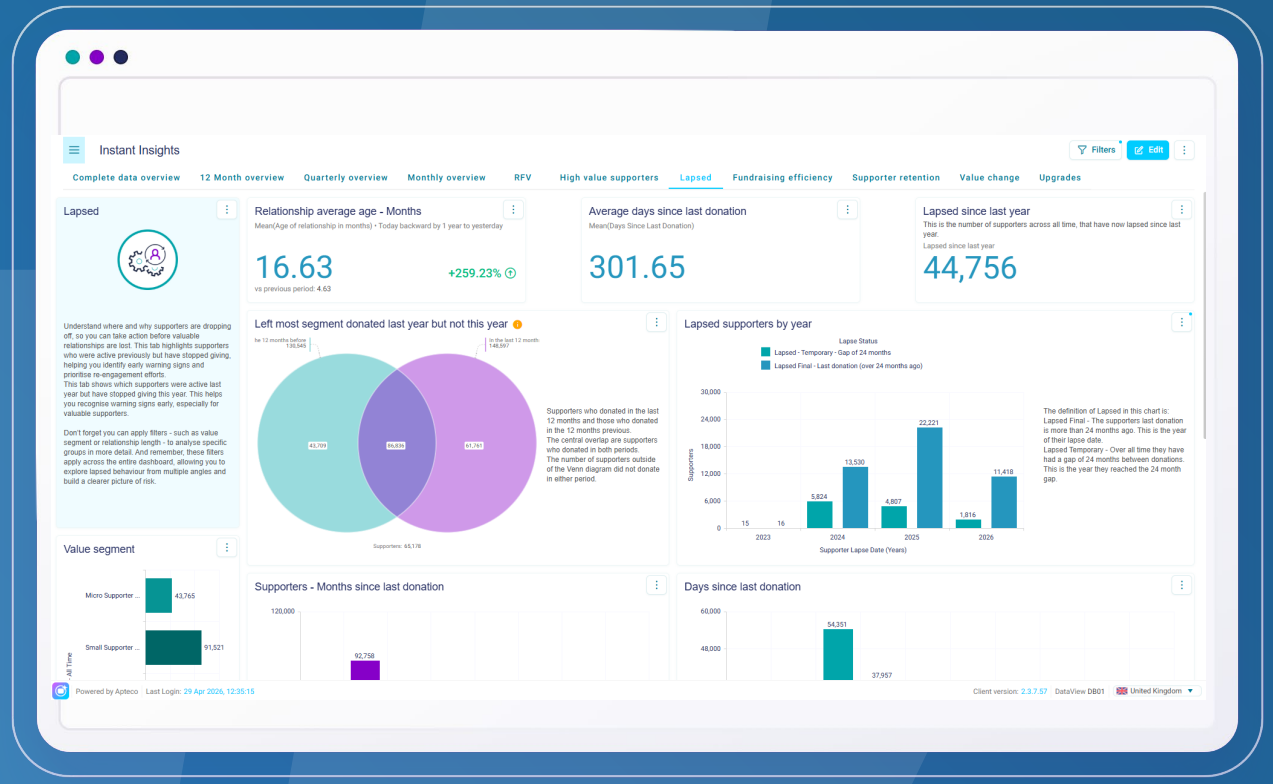
Using clear segmentation and visual analysis, you can quickly spot your top contributors and see how value is distributed across your supporter base.

A built-in Pareto tile makes it easy to understand how much of your income comes from your top supporters - helping you prioritise stewardship and maximise return.



Explore

- Supporter value segments
- Top supporters (last 12 months)
- Value development
- Value segment by relationship age
- Top donation value bands



Explore:

- Lapsed supporters over different timeframes
- Time since last donation
- Age of relationship
- Value segment
- Dropouts by relationship age
- Dropouts by value segment

Lapsed

Understand where and why supporters are dropping off, so you can take action before valuable relationships are lost.

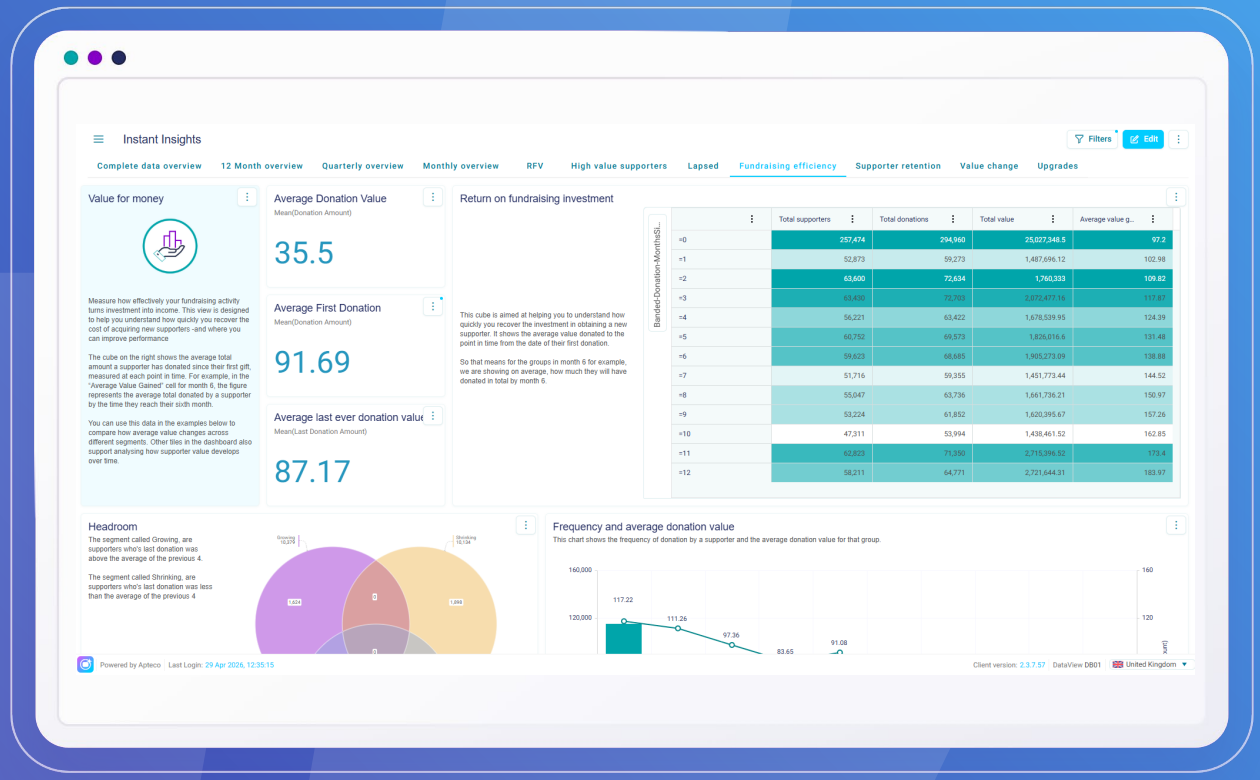
This tab highlights supporters who were active previously but have stopped giving, helping you identify early warning signs and prioritise re-engagement efforts.

Don’t forget you can apply filters - such as value segment or relationship length - to analyse specific groups in more detail. And remember, these filters apply across the entire dashboard, allowing you to explore lapsed behaviour from multiple angles and build a clearer picture of risk.

Fundraising efficiency

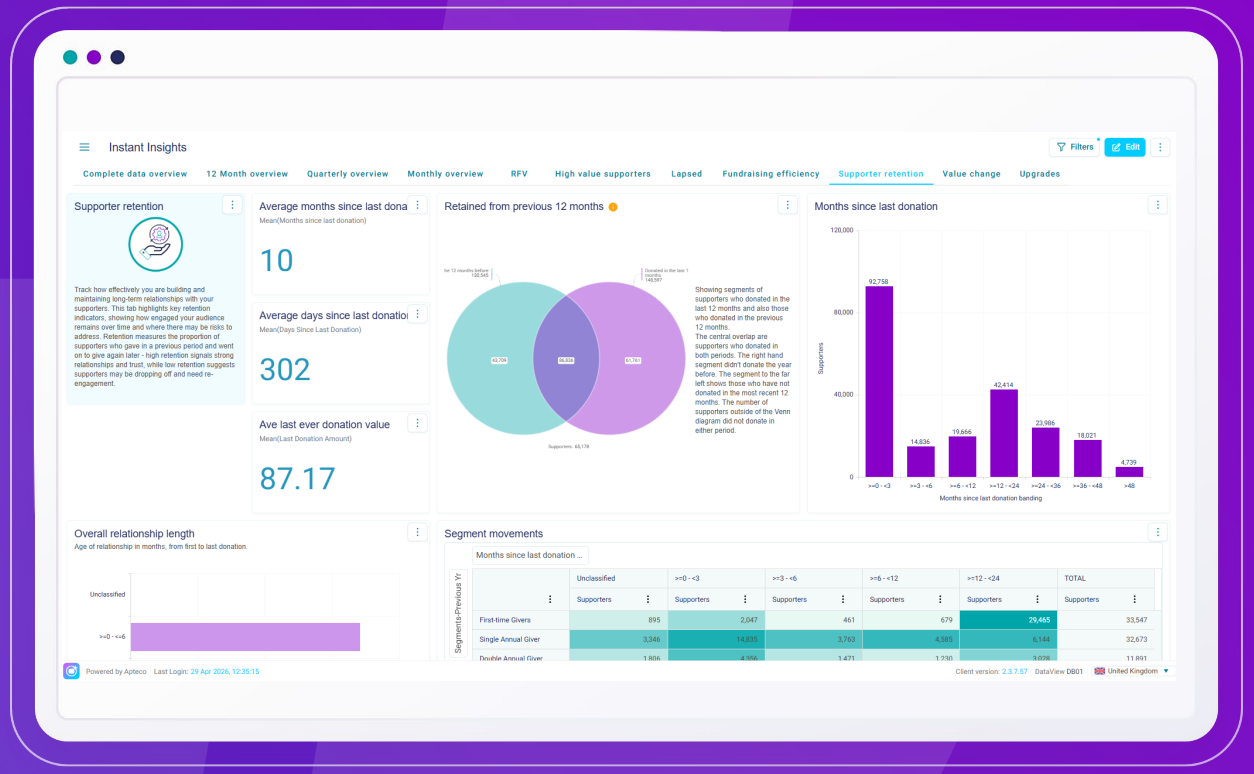
Measure how effectively your fundraising activity turns investment into income. This view is designed to help you understand how quickly you recover the cost of acquiring new supporters - and where you can improve performance.

At the core of this tab is a view showing the average value generated by supporters over time, starting from their first donation. This allows you to see how supporter value builds month by month and compare performance across different segments.



Explore:

- Return on fundraising investment
- Average donation amount
- Last donation value
- Headroom analysis
- Frequency and average value (Pareto)



Explore:

- Time since last donation
- Last donation value
- Overall relationship length
- Segment movements

Supporter retention

Track how well you are building and maintaining long-term relationships with your supporters.

This tab highlights key indicators of retention, helping you understand how engaged your audience remains over time - and where there may be risks to address.

High retention signals strong relationships and trust, while low retention suggests supporters may be dropping off and need re-engagement.

These insights help you strengthen retention strategies, improve supporter experience, and build more sustainable, long-term income.

Value change

Explore changes in value to uncover where your future fundraising opportunities lie. This tab focuses on changes in supporter behaviour, helping you identify groups who are increasing their giving - as well as those who may need attention.

A key visual shows the change in donation value over time, comparing the most recent 12 months with the previous period. You can clearly see which supporters are growing in value and which are declining, with positive and negative shifts displayed across the chart.

By focusing on these changes, you can take a more proactive approach - nurturing growth opportunities while addressing risks before they impact your fundraising performance.



Explore:

- Changes in recent donation values
- Percentage changes in donation value

INSTANT INSIGHTS
FOR CHARITIES

Enable on-demand Data Refresh

The On-demand Data Refresh option gives you complete control over how current and comprehensive your data is.

By simply uploading a new CSV file, you can seamlessly replace your existing dataset and extend the time period covered so your insights stay relevant, your reporting stays accurate, and your decisions are based on the latest available information