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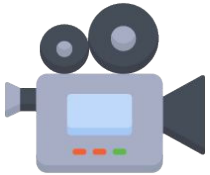
Working with Constituents: Relationships and Households

Bloomerang Academy

Thank you for joining us today. We're glad you are here.
Please tell us where you're joining from in the CHAT!

Housekeeping

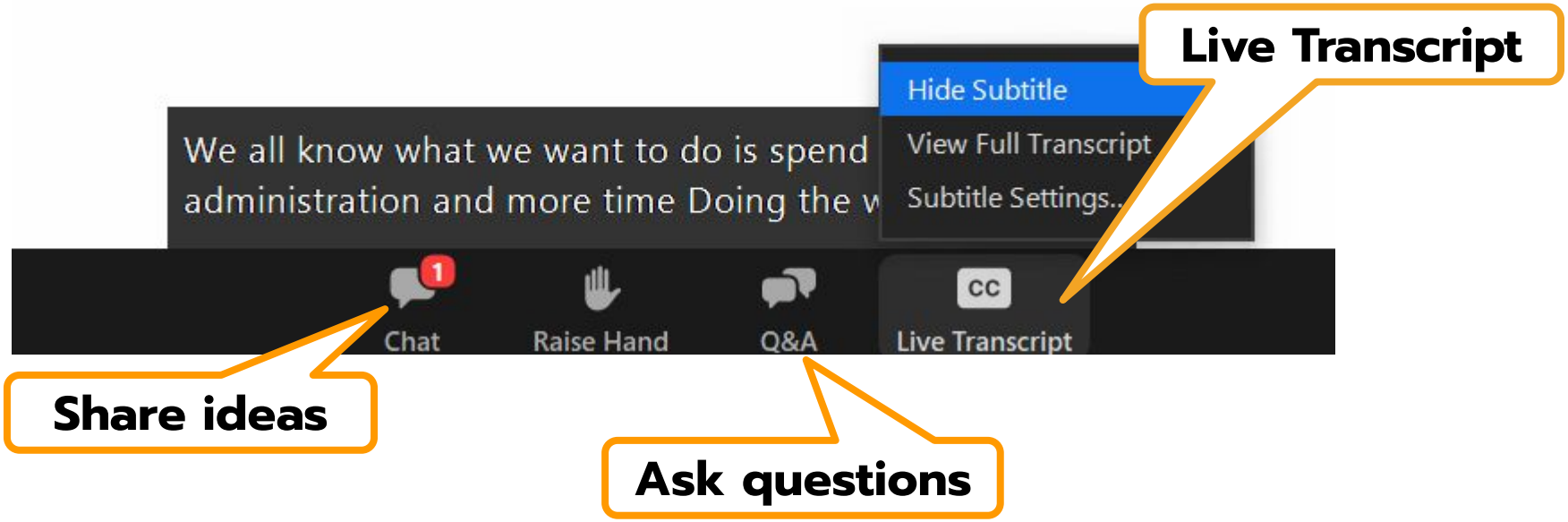


We're recording this webinar! We'll send you a link to the recording and copy of the slides within 48 hours.

Feel free to ask questions! Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.

Share your highlights and takeaways on your favorite social media channel and make sure to give us a follow!

Housekeeping



Our dial-in number in case you need it today: **+1 669 900 6833**

If you need more assistance, please reach out to support@bloomerang.com.

BLOOMERANG

Built for purpose

Giving platform designed to improve fundraising outcomes

Easy-to-use tech, built for you

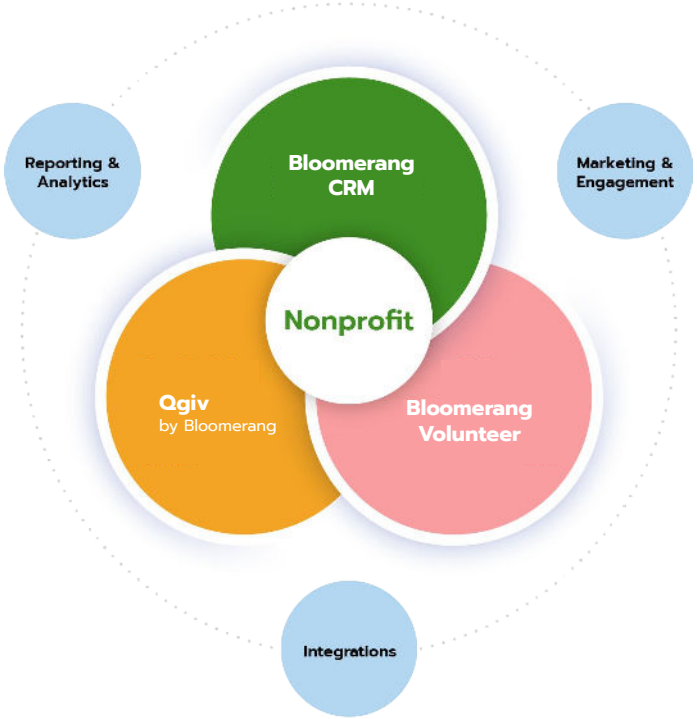
Industry leading solutions

Insights that lead to better results

Engagement that inspires giving

Increase fundraising revenue

Automate and simplify day-to-day



VALUE

Raise more

Engagement quality increases, effort decreases, and giving soars!

30%

Higher overall donation page conversion rates.

$108

Average recurring gift, 4x the industry average.

15%

Increase in donor base year-over-year.

$180

Average one-time gift, 50% higher than the industry average.

25%

Increase in recurring donor conversion rate.

26%

Increase in dollars raised year-over-year.

Margie Worrell

Curriculum Manager

Margie Worrell is the Curriculum Manager at Bloomerang. She serves on the board of the Peace Learning Center in Indianapolis, and has worked extensively with nonprofits as both a staff member and a lead volunteer. Her passions include education, theatre, her two children and her two small dogs.

What will we cover today?

Relationships

- Add Relationship to Constituent
- Edit or Remove Constituent Relationships
- Edit Relationship Roles
- Creating a new relationship role

Households

- The Household Profile
- Primary contact information
- Head of Household
- Create a Household
- Add and Remove Household Members
- Change Head of Household
- Edit Household Name Data
- Delete a Household

Relationship Managers

- How to assign them
- How to edit or remove them

Reporting on Relationships, Households and Relationship Managers

Why add this data to our database?

1. Enhanced communication and stewardship
2. Improved targeting of messages
3. More accurate data and better analytics
4. Improved networking and opportunity expansion

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Relationships

Add a relationship

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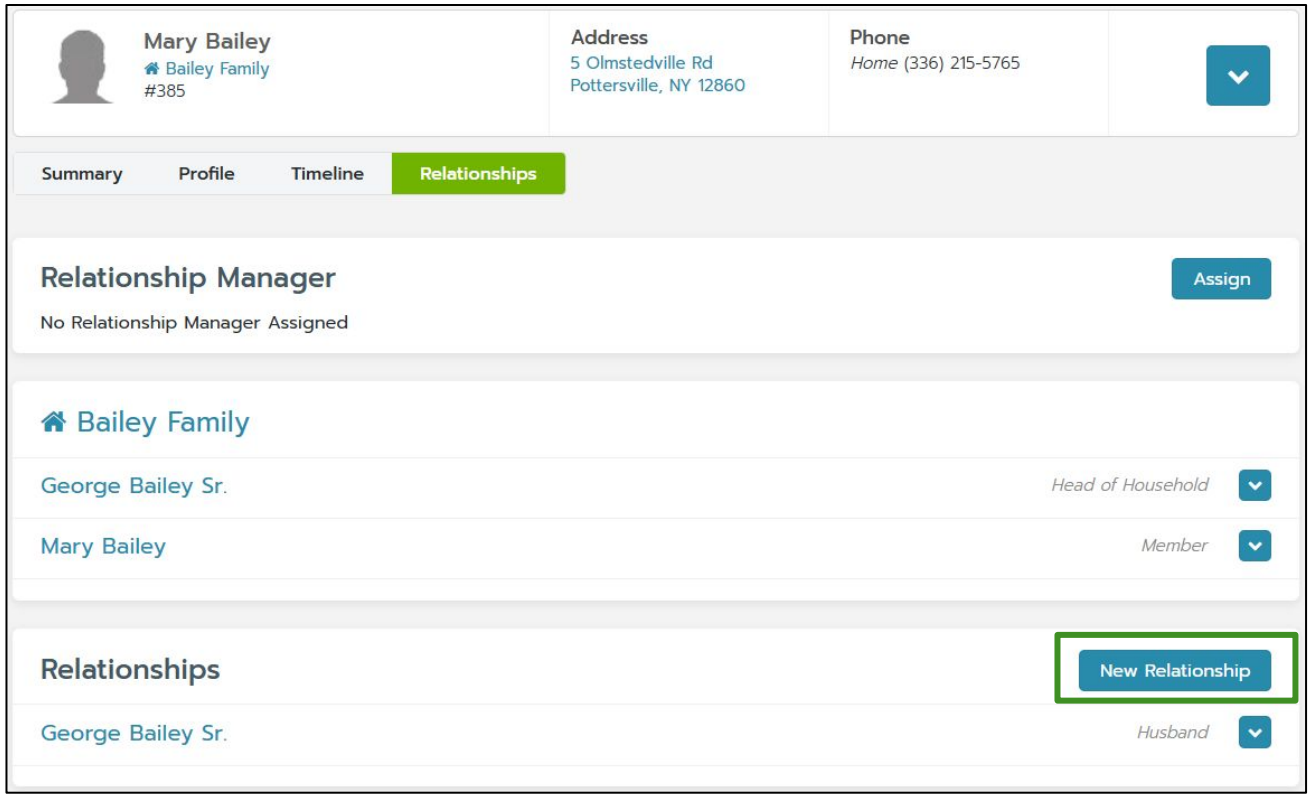

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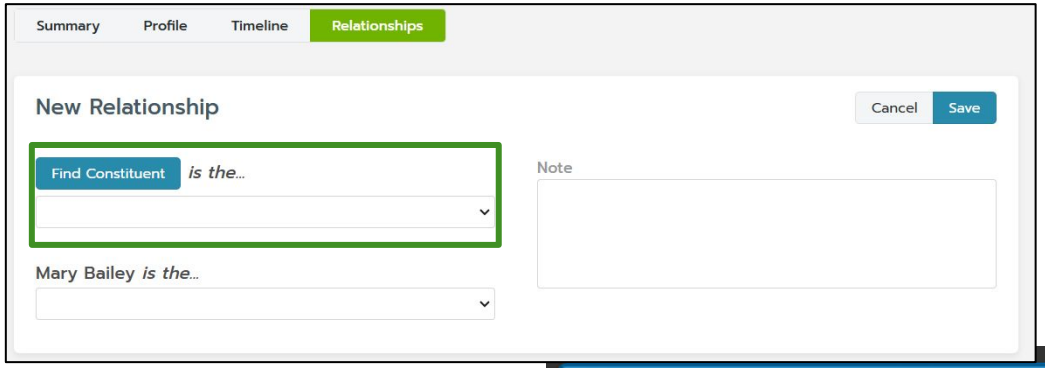
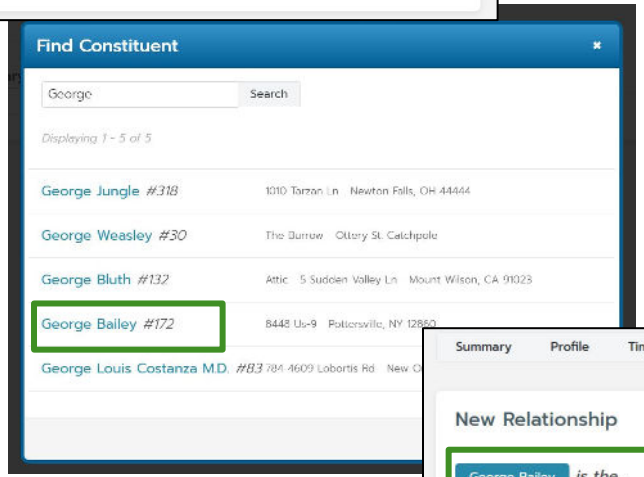
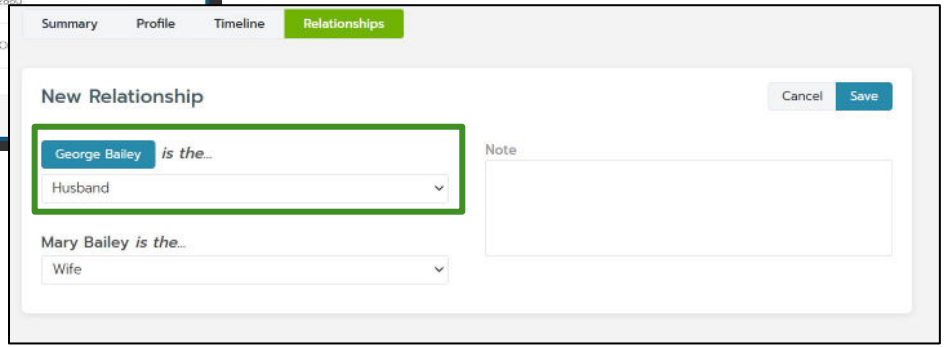
Add a relationship







Add a relationship

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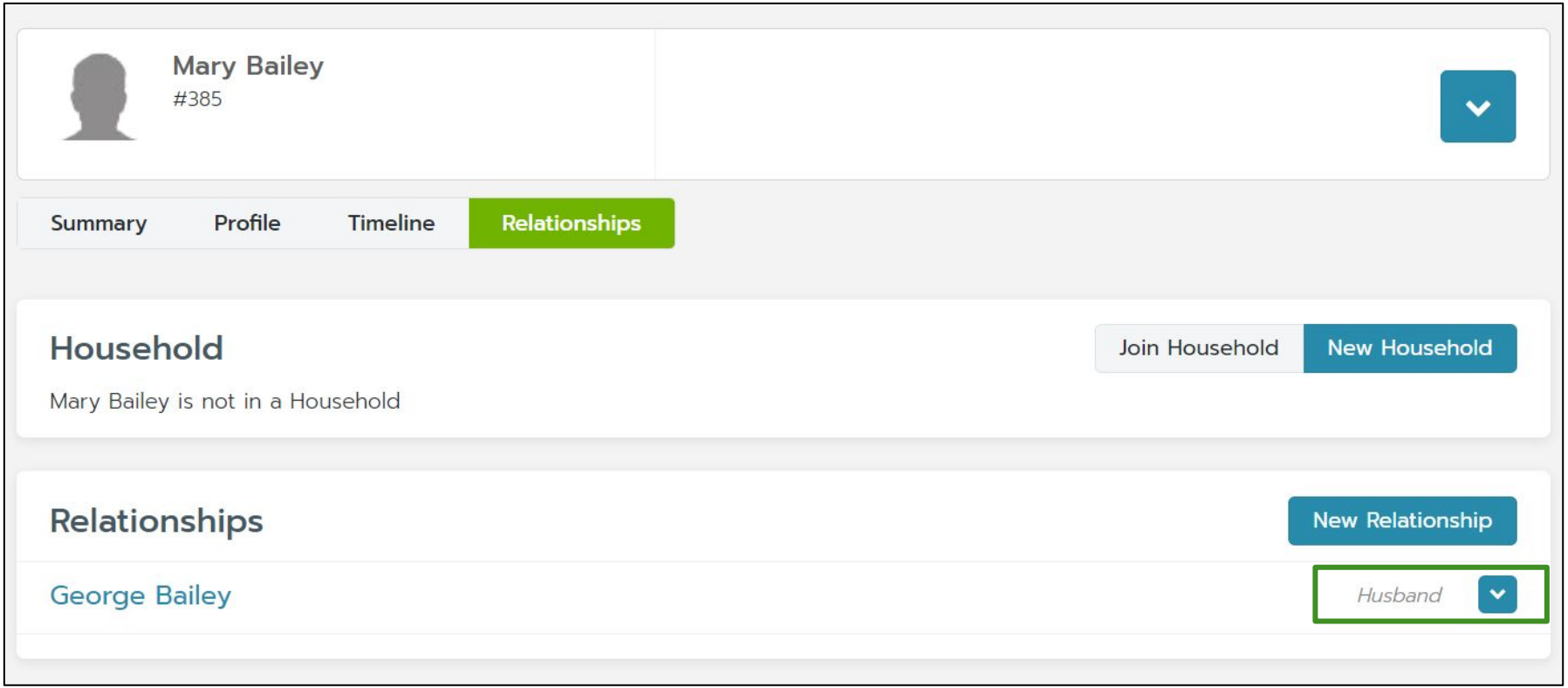

Edit or remove a relationship

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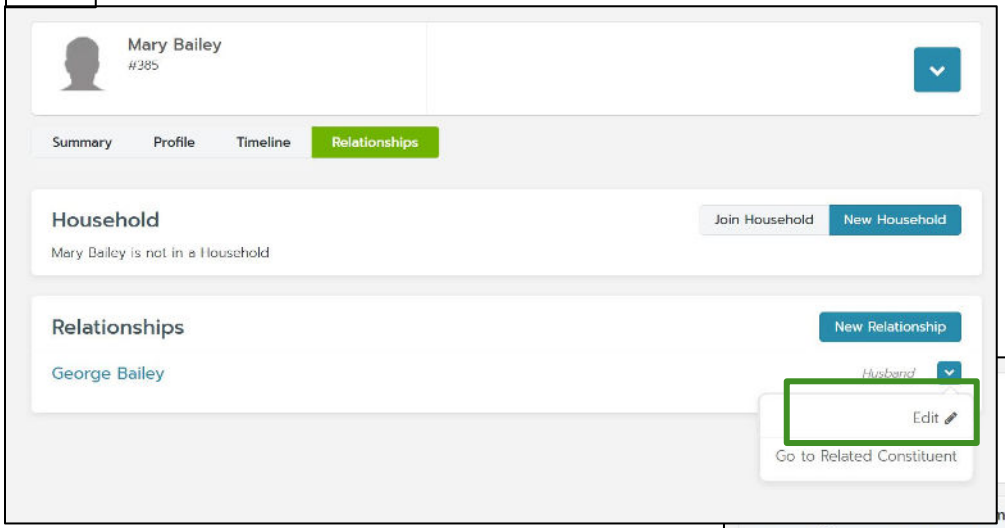
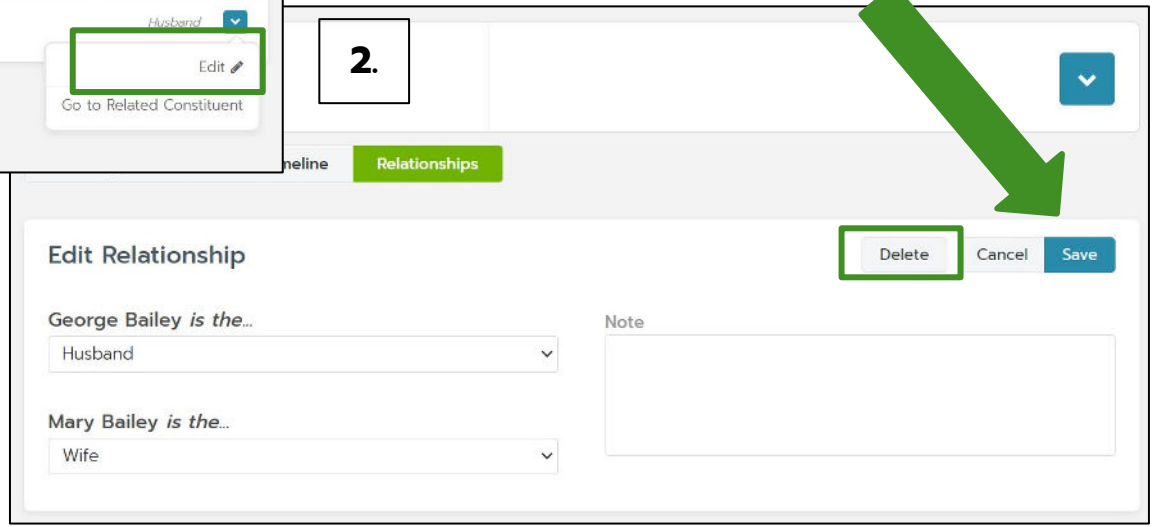
1.



Don't forget to click save!

2.



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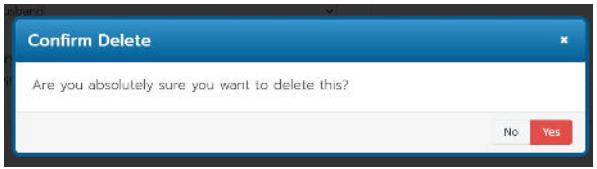

Edit relationship roles

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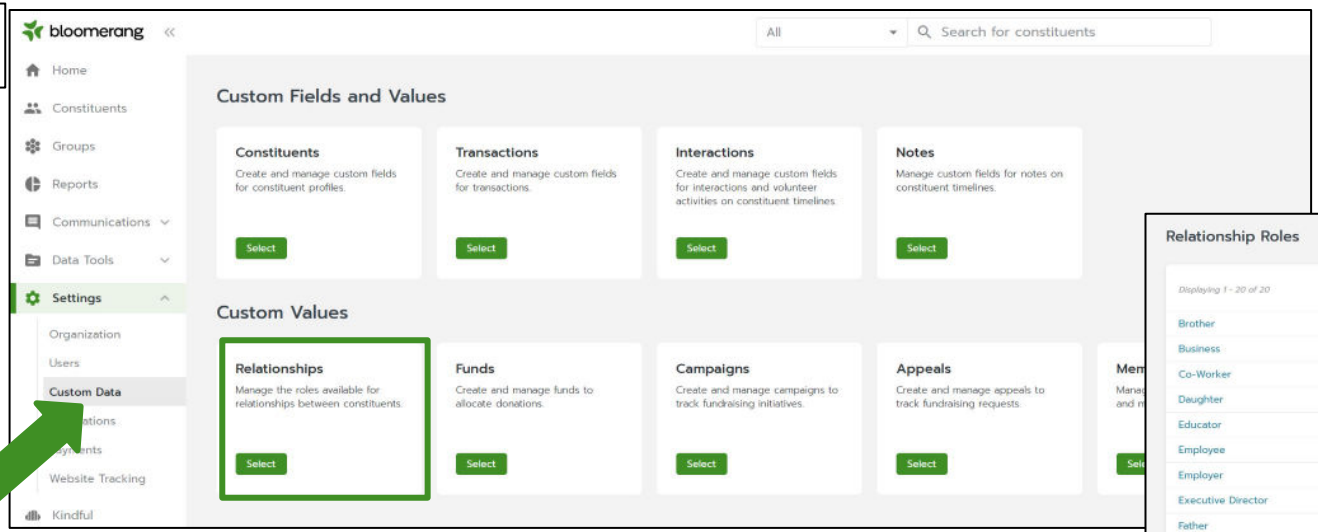
1.



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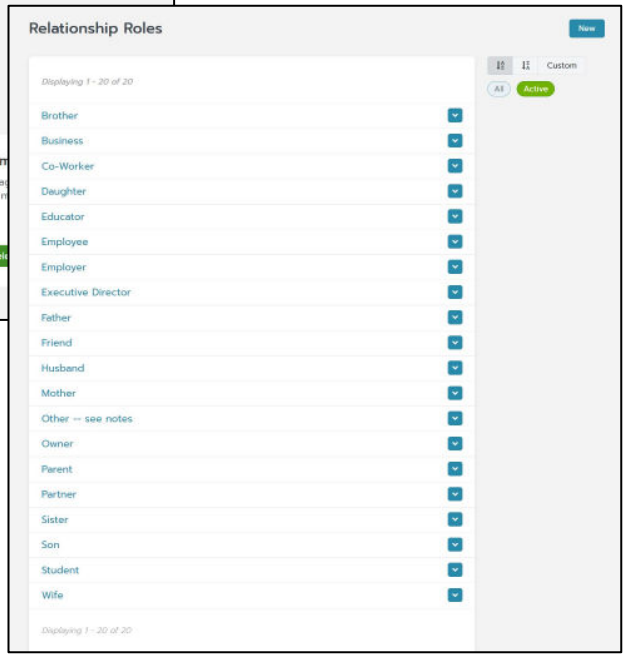

Edit relationship roles

Create a new role....

Or click on the blue dropdown arrow to edit or deactivate a role.

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Households

Household profiles components

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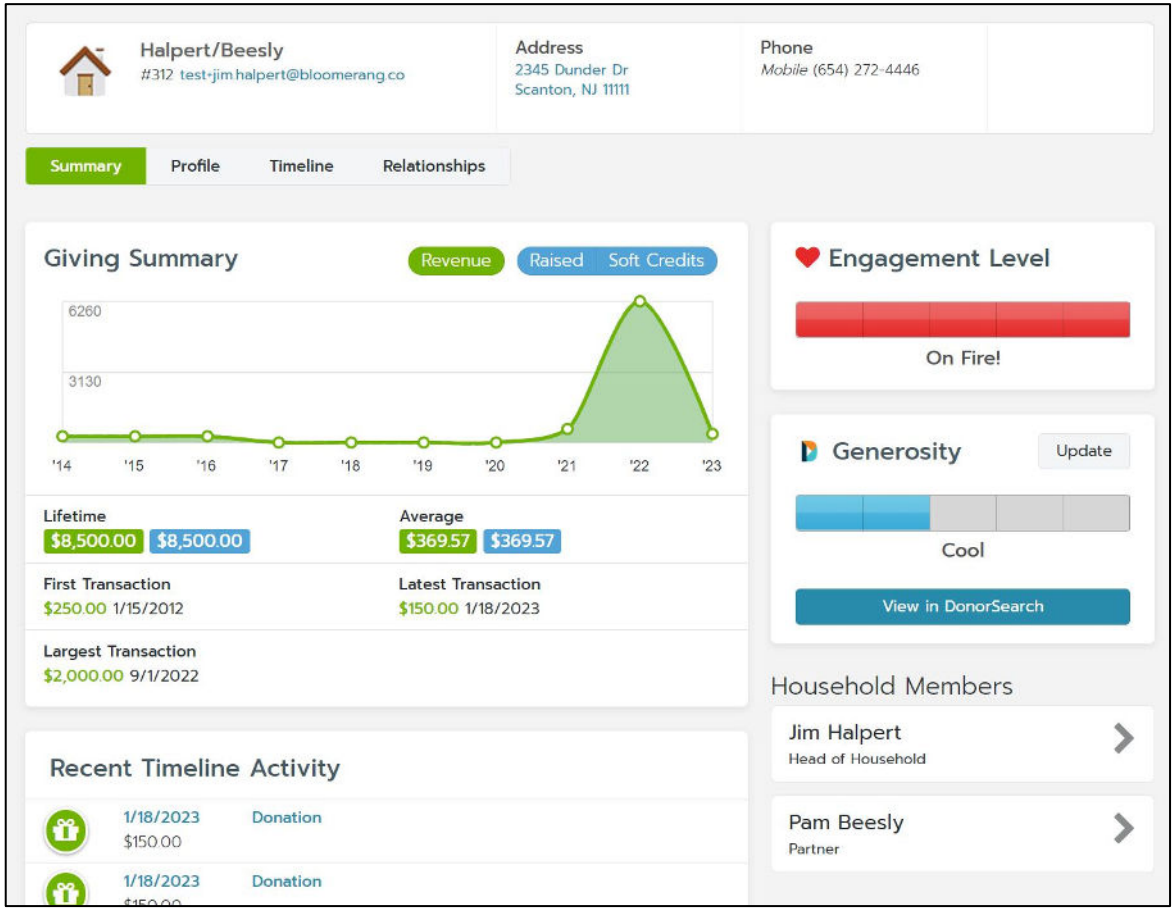
Header

- Would show **Inactive or Deceased** only if **ALL** constituents in the household had been marked as such.
- Would show **First-time Donor** if a member gives for the first time and **no other member** has any donations.
- Primary contact information is pulled from the head of the household.
- **Head of Household** should be the member who has the strongest relationship with your organization and has contact information in the system.

Household profiles components

Summary

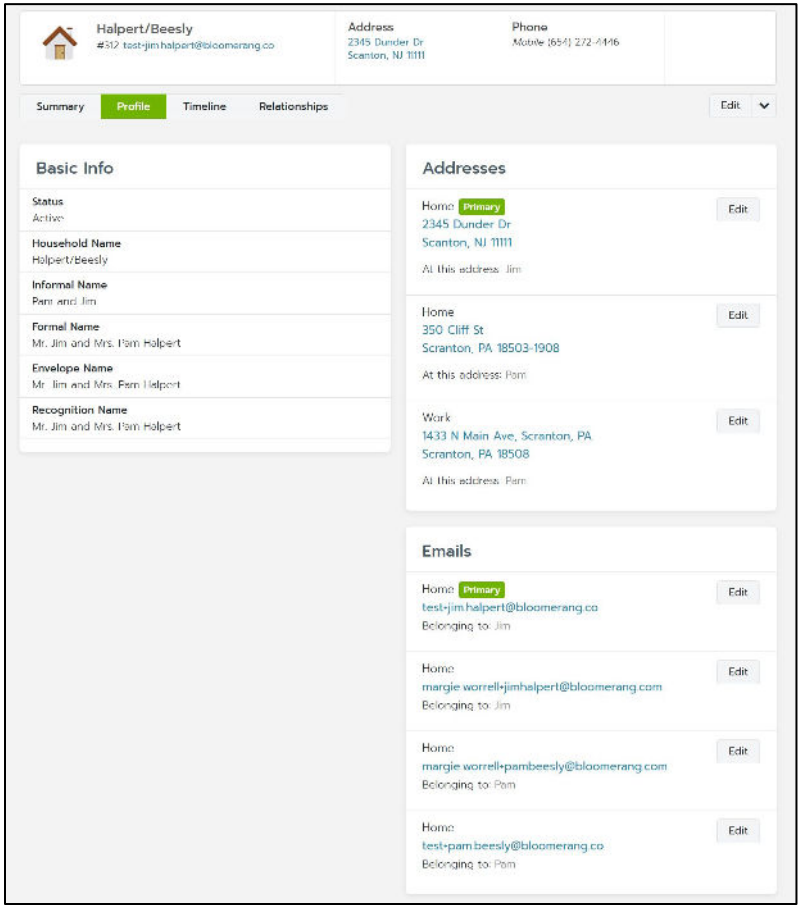
- Shows all combined data from all members of the household.
- **Household Members** area is linked to individual constituent profiles.



Household profiles components

Profile

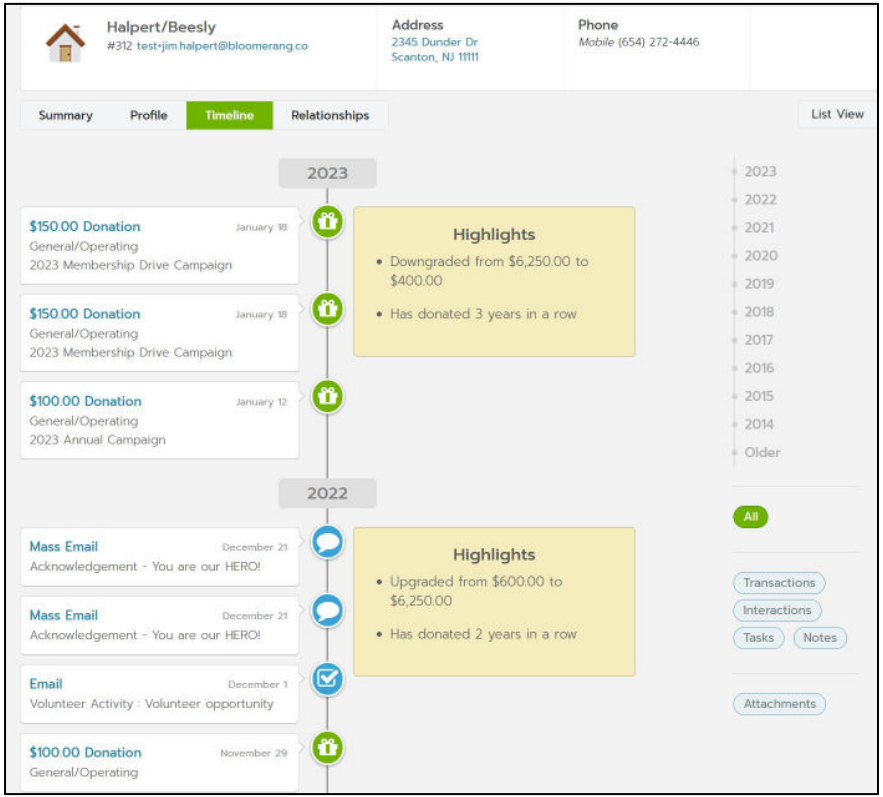
- Basic Info is unique to the household and can be edited.
- Addresses, Emails, and Phone Numbers are pulled from all members of the household.
- Communication preferences are set to what is shared across **ALL** household members.



Household profiles components

Timeline

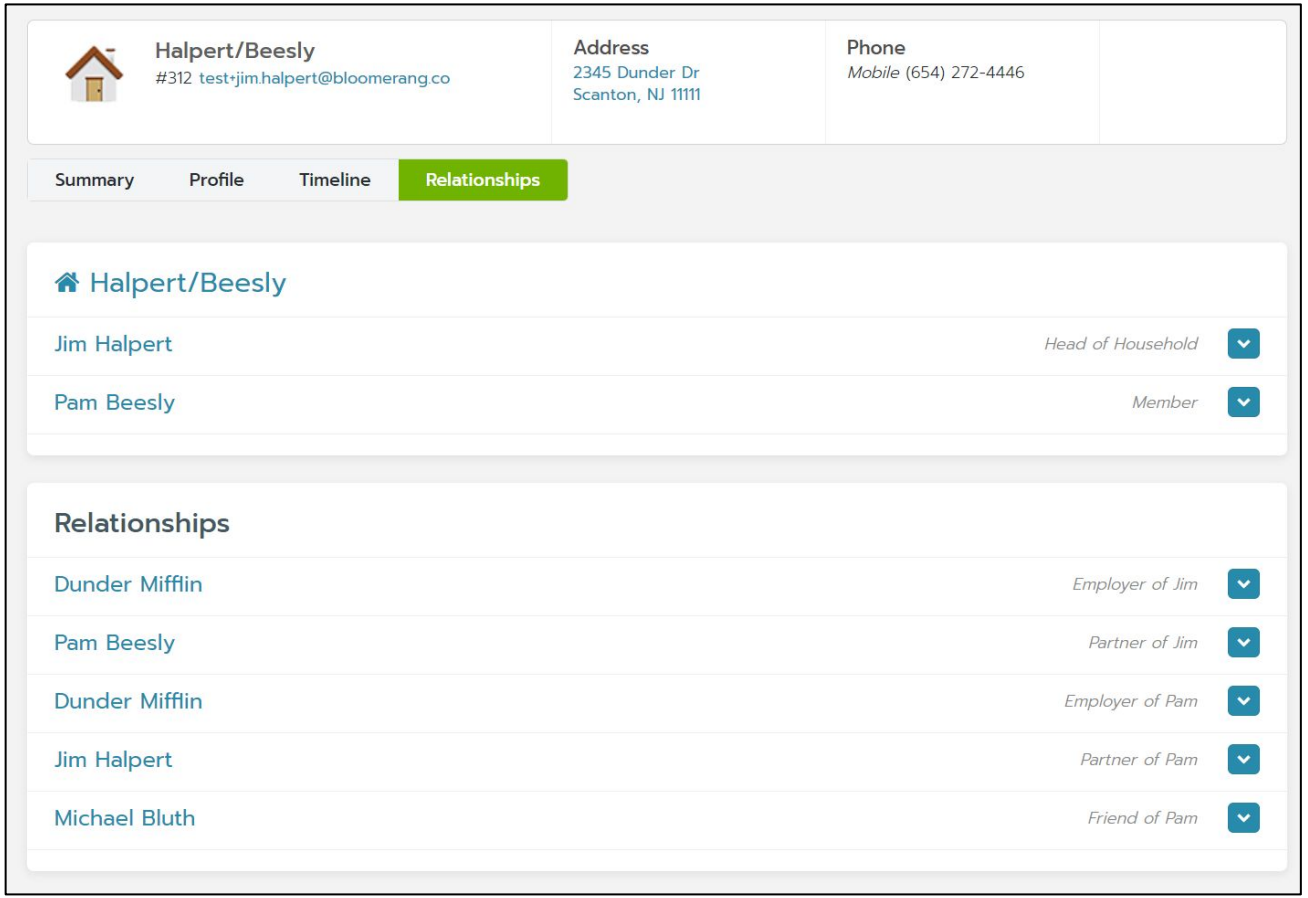
- Combined entries from **ALL** members of the household.
- When you click into the interaction it will show the member that engaged in the activity.



Household profiles components

Relationships

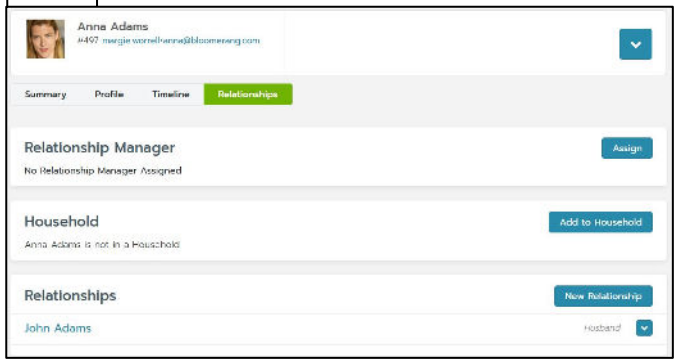
- Shows all existing relationships starting with the head of the household.



Creating a new Household

- Search for head of household
- On constituent's account, select Relationships
- Click on Add to Household and then Create new household for this constituent
- Fill out the New Household pop-up and click Save
- You will see a household symbol under the constituent's name with the new household name

1.



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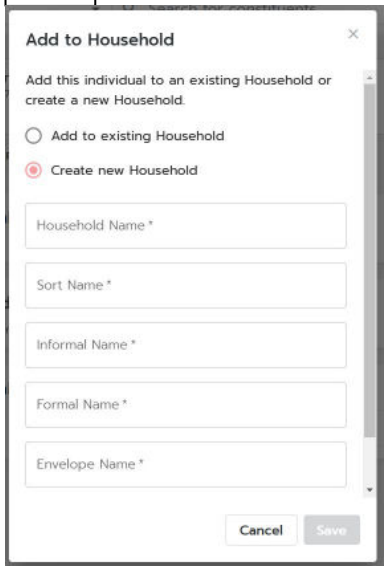

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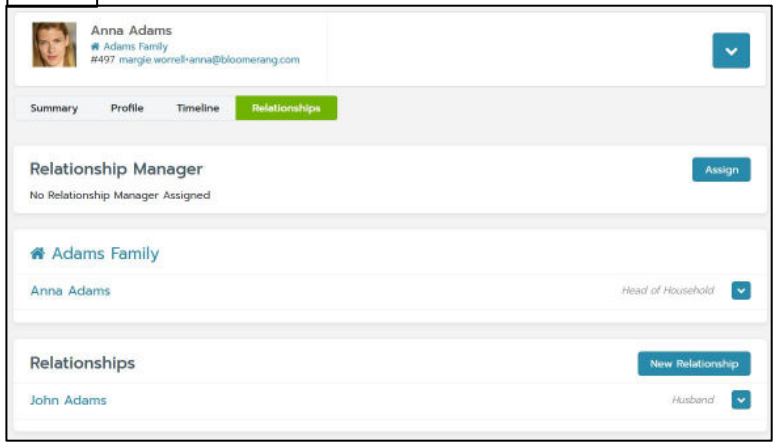
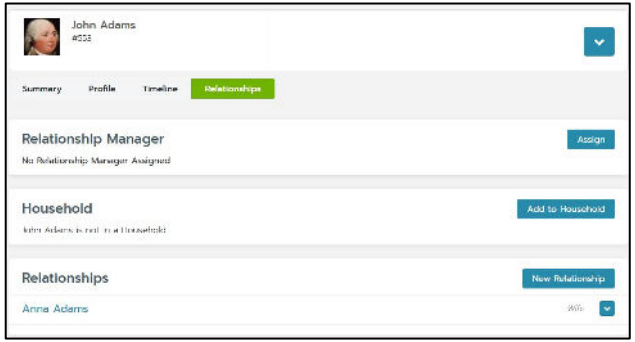


Adding a new Household member

- Search for member to add
- Click on Relationships tab
- Click Add to existing Household
- Search for Household name
- Click on Household and Save
- New member is created

1.



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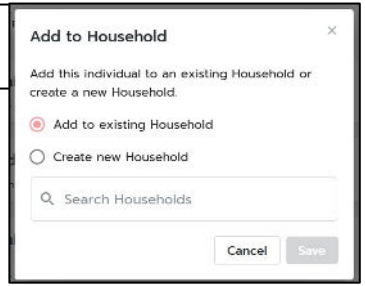

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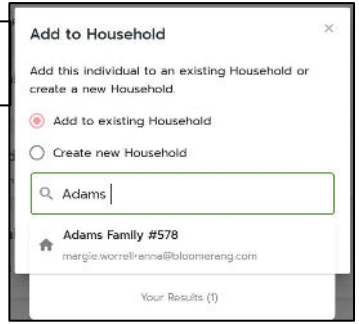

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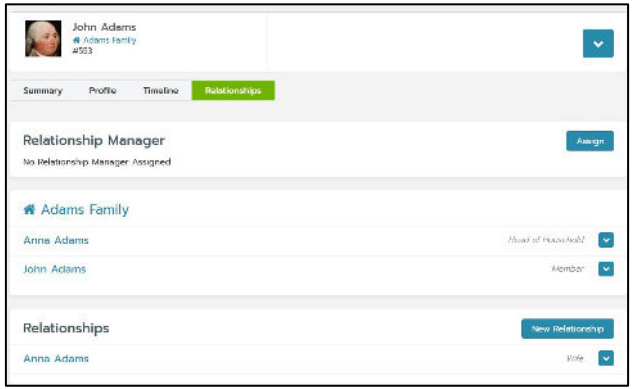


Head of the Household

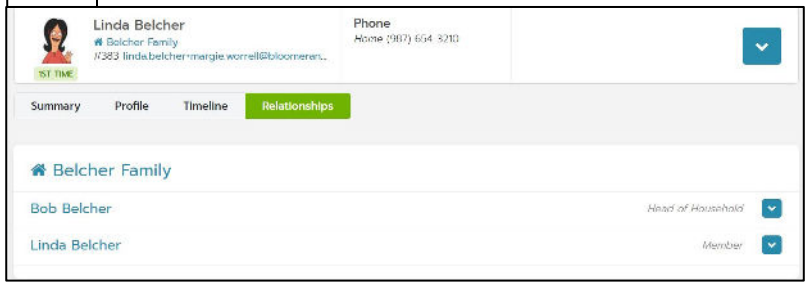
Simply means that this is the info to be used when communicating with all members.

- Use whoever has strongest relationship with your organization
- Another member's info may be used if **BOTH** are true;
  - Head of household is missing the piece of contact information
  - Household has only 2 members

Removing a Household member

- Open the constituent's account.
- Click the Relationships tab.
- In the household's section, click next to the constituent's name.
- Click Leave Household.

1.



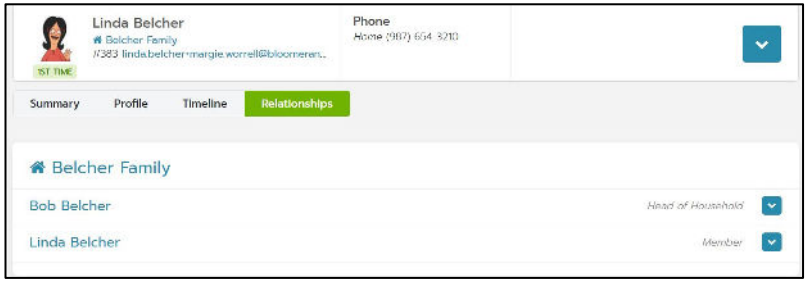
2.

Change Head of the Household

To change which constituent's contact information is used:

- Open the constituent's account.
- Click the Relationships tab.
- In the household's section, click next to the constituent you want to use.
- Click Make Head of Household.

1.

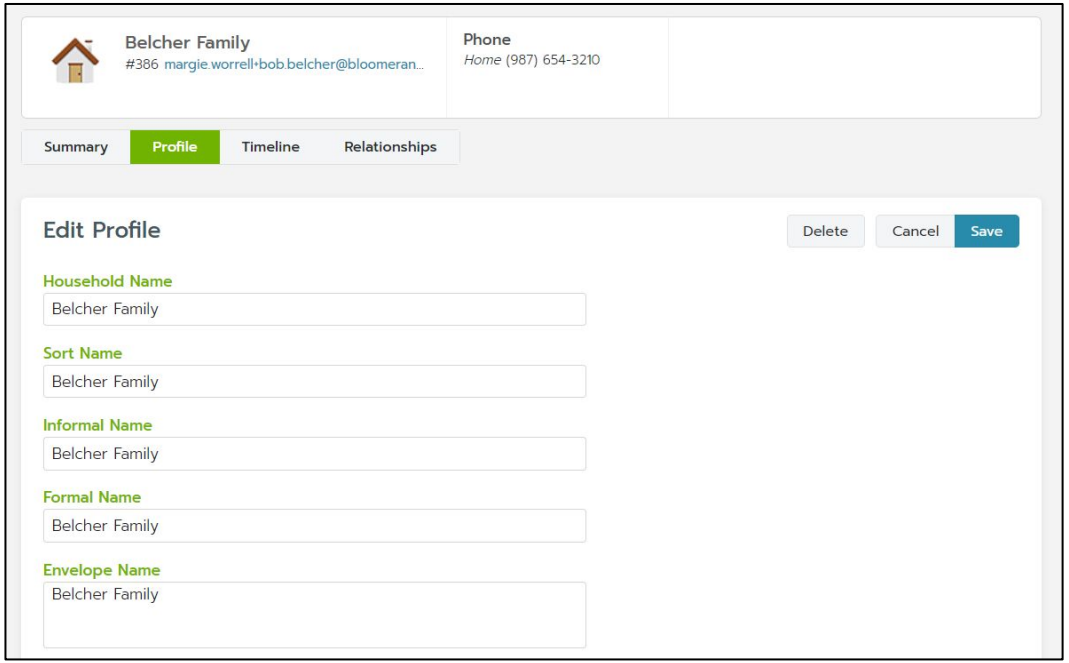


2.

Edit Household Name Data

To change the household's name data, such as how an envelope is addressed:

- Search for and open the household account.
- Click the Profile tab.
- Click Edit.
- Make any changes and click Save.

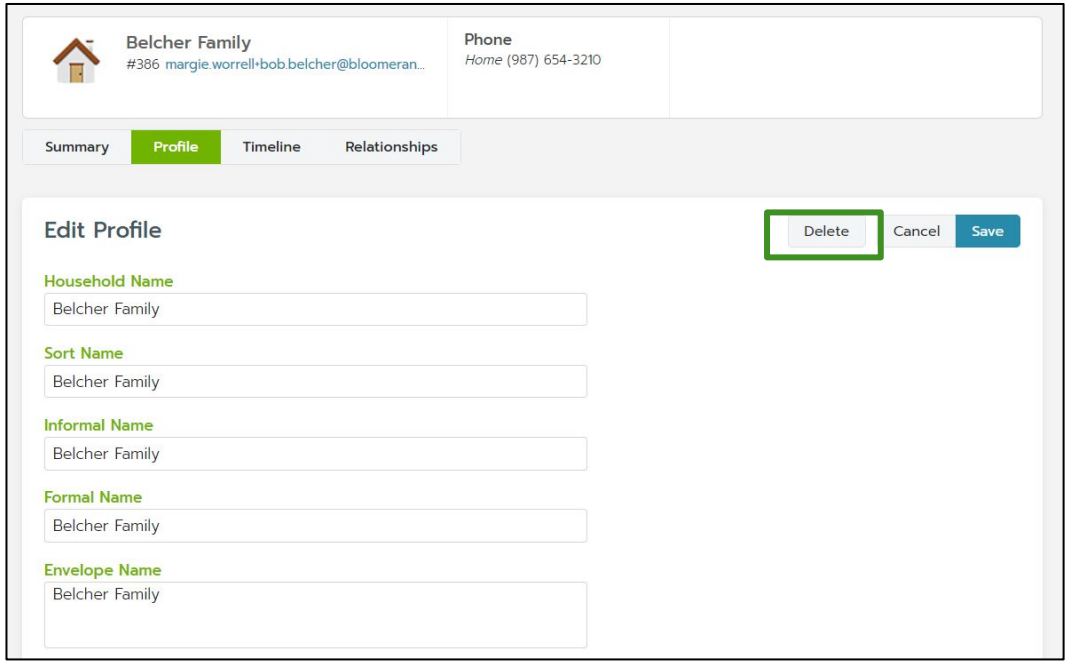


Delete a Household

Since households only aggregate the household members' data, you can delete a household without affecting the constituent accounts. To delete a household:

1. Search for and open the household account.
2. Click the Profile tab.
3. Click Edit.
4. Click Delete.

Removing all the household members from the household also deletes the household.



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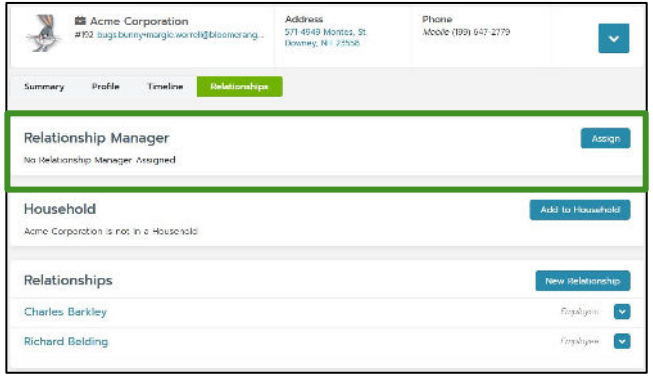
Relationship Managers

Adding a Relationship Manager to an account

- Search for the constituent account (can be organization or individual)
- On constituent's account, select Relationships
- Click on Assign next to Relationship Manager
- Choose the manager from your list and click Assign
- You will see the Relationship Manager displayed in the tile and above in the header

1.



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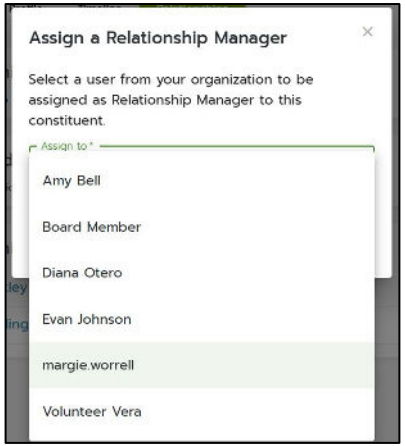

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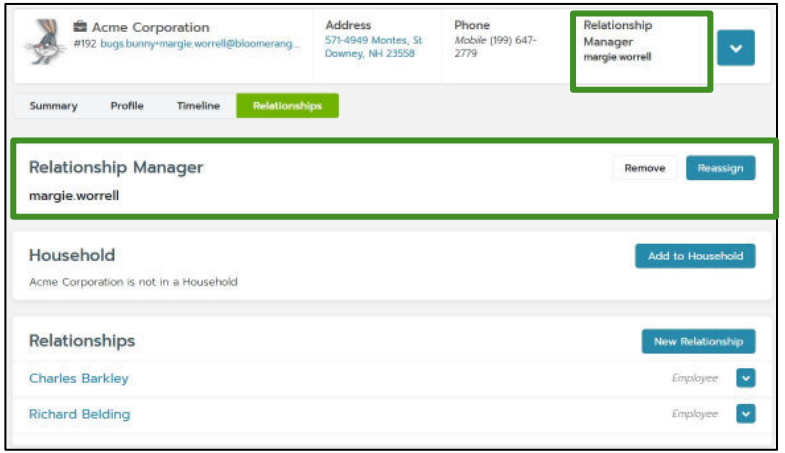
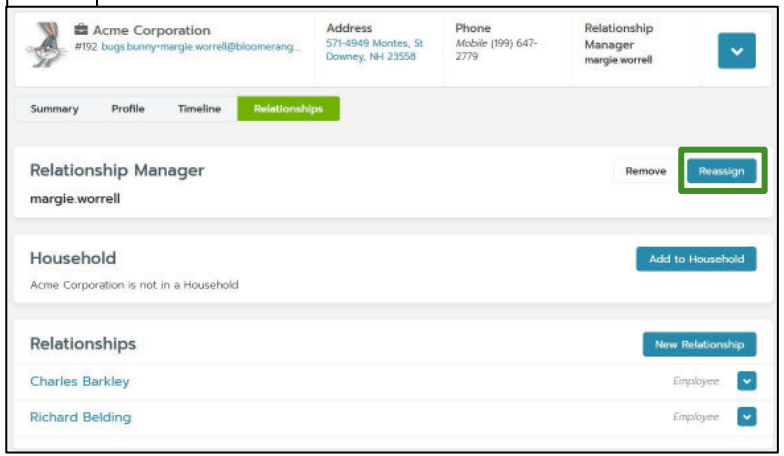


Reassign a Relationship Manager to an account

- Search for the constituent account (can be organization or individual)
- On constituent's account, select Relationships
- Click on Reassign next to Relationship Manager
- Choose the new manager from your list and click Assign
- You will see the new Relationship Manager displayed in the tile and above in the header

1.



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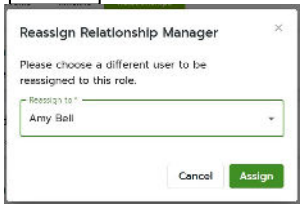

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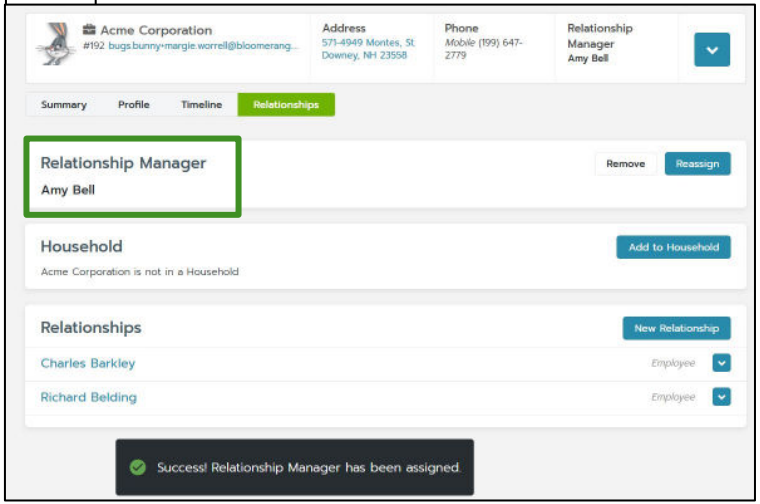
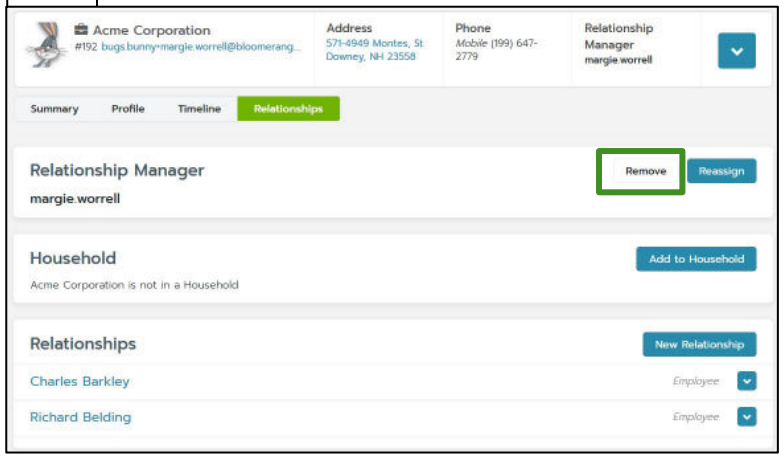


Remove a Relationship Manager

- Search for the constituent account (can be organization or individual)
- On constituent's account, select Relationships
- Click on Reassign next to Relationship Manager
- Choose the new manager from your list and click Assign
- You will see the new Relationship Manager displayed in the tile and above in the header

1.



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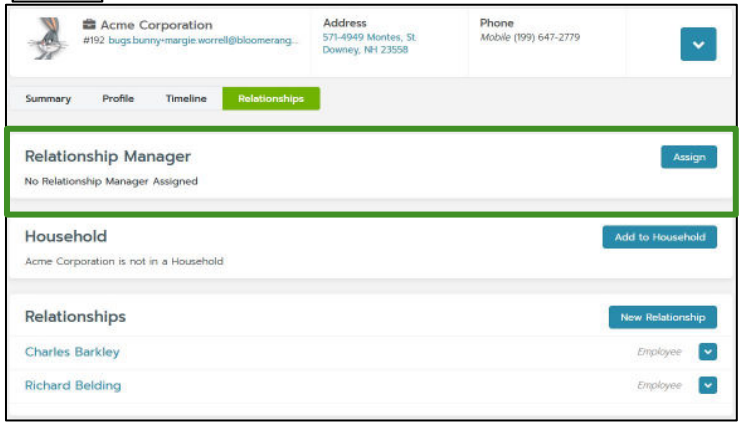

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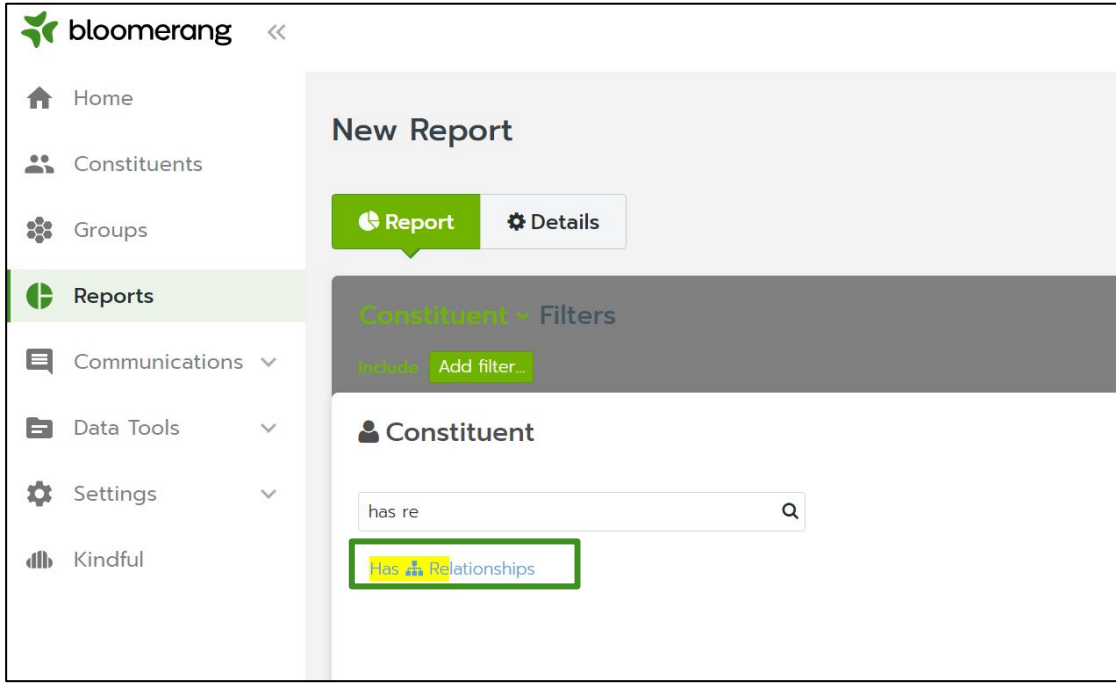
Reporting

Reporting on Relationships

Build a report about relationships to see how your constituents are connected. These reports can show you who can help you engage and cultivate a particular constituent. Of course, you can use these reports to send letters and emails.

Since relationships are all about people, relationship reports are based on constituents.



“Has Relationships” Filter

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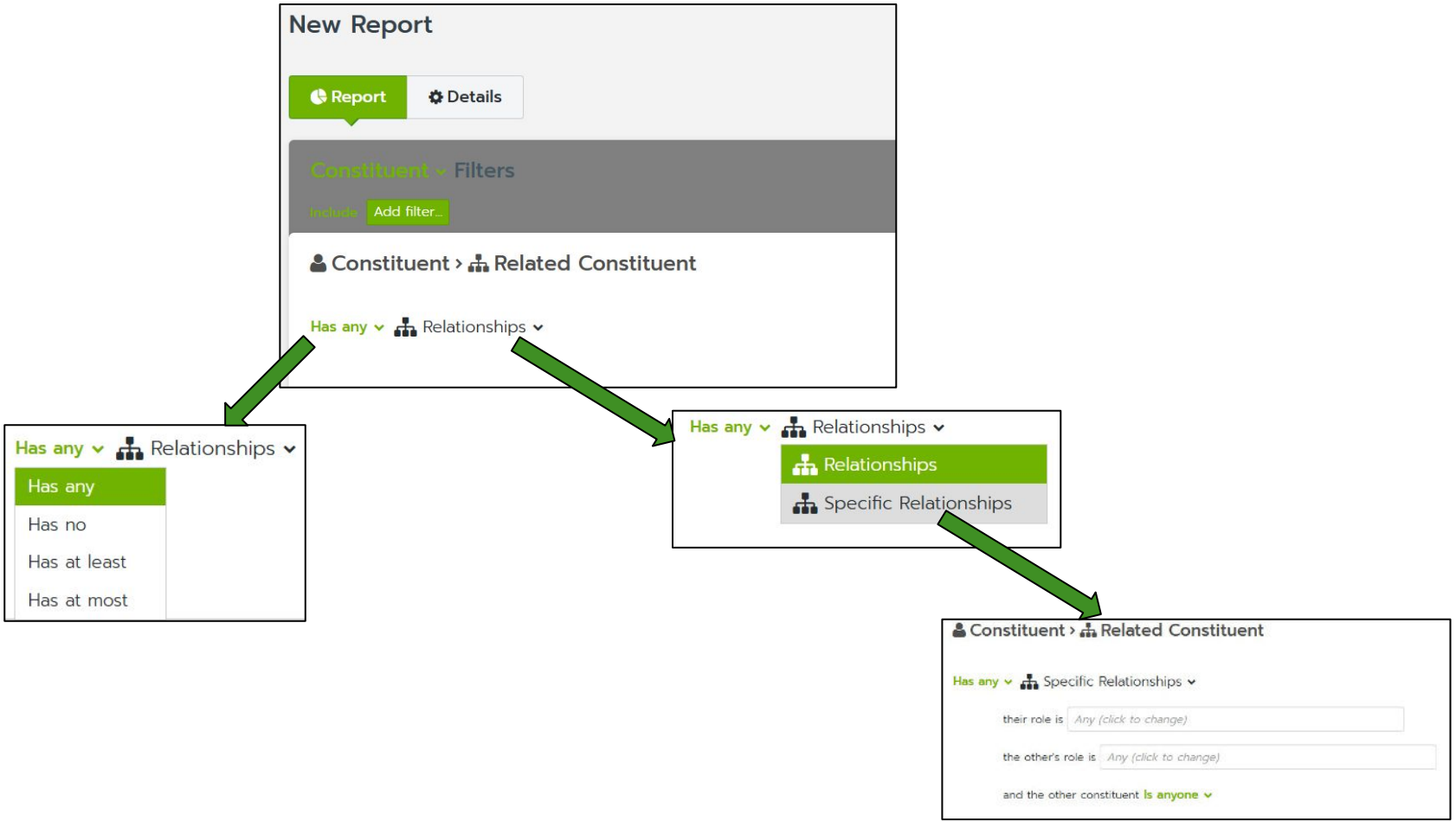

Reporting on Households

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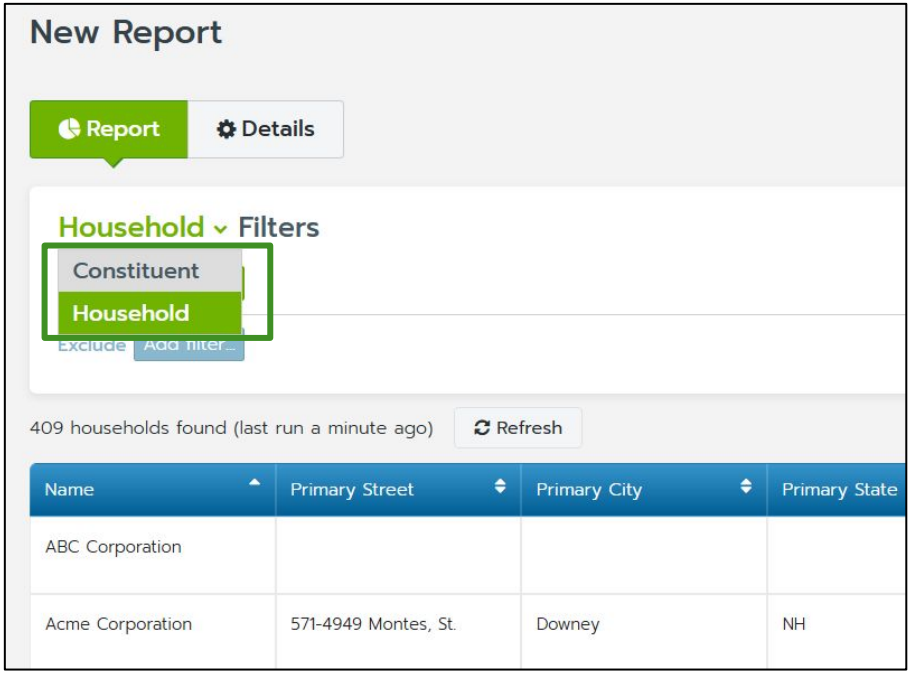
You can run a report by Household or Constituent. When a report is run by Household:

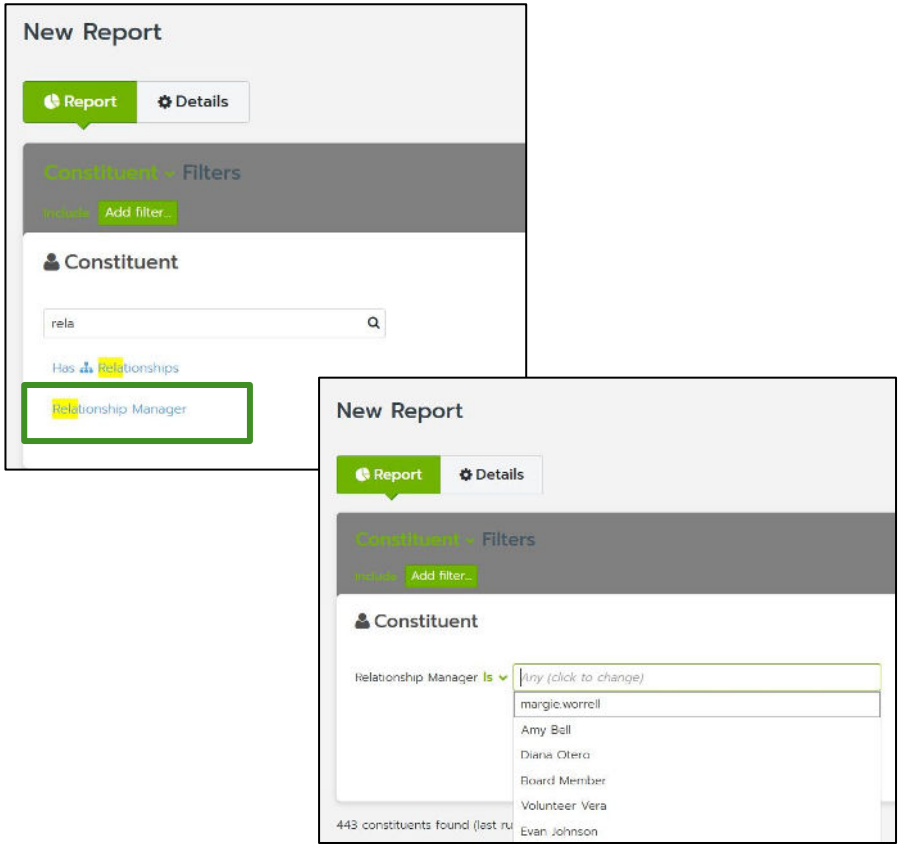
- In a **constituent report**, household members are grouped together so that instead of listing each household member separately, their household is listed.
- In a **transaction, interaction, note, or task report**, Individuals who are in a household display the Household Name instead of the individual's names.
- ****Organizations and individuals not in a household are still listed.****



Note: Running a report by household doesn't mean the report only lists households. The results will include households, individuals not in households, and organizations.

Reporting on Relationship Managers

- Use a **constituent report**, search for relationship manager in filters and click.
- Select the Relationship Manager from the list.
- You will see all constituents assigned to this Relationship Manager.



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Let’s go into Bloomerang!

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Q&A

Resources

[Relationships and Households]

[Report on Relationships]

[Add and Manage Relationships and Custom Relationship Roles]

[Create and Manage Households]

[About Relationship Managers]

[Run Relationship Manager Reports]

[Assign, View, Reassign, and Remove Relationship Managers]

Thanks for joining!

More tools and resources to help you grow.

Connect with us!
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Request a demo
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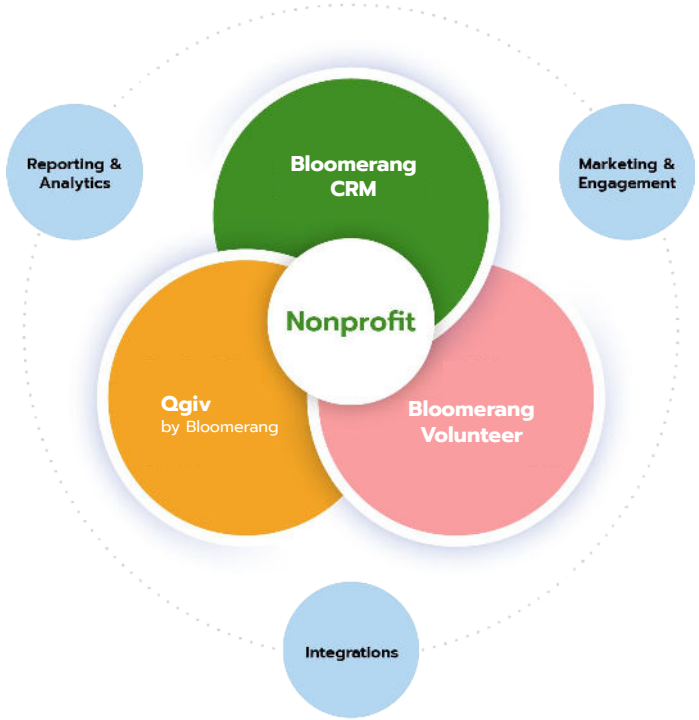
New! Bloomerang Learning on-demand training

Visit the Knowledge Base for more "how-to" articles.



We'd appreciate your feedback.

Fill out the post-session survey to let us know how we did.

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Thank you!