

techsoup



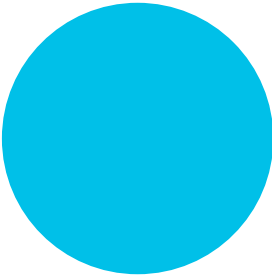
TAPP Network
A DIGITAL TRANSFORMATION AGENCY

Why Your Systems **Aren't Driving Fundraising** and **Engagement** (And How to Fix Them)

Hosts: Jason Spangler & Sarah Bucci

06.09.2026 | Tapp Network

Introductions



Sarah Bucci
Sr. Account Manager
Tapp Network



Jason Spangler
Director of Business Development
Tapp Network





Agenda

- About Tapp Network
- Why Nonprofits Invest in Technology
- What High-Performing Nonprofits Do Differently
- The 3 Pillars of System Performance
- Smarter Automation with AI
- How Tapp Network Can Help



www.tappnetwork.com

Empowering Organizations for Good

We transform your visionary goals into digital realities, empowering nonprofits and government agencies to thrive in today's dynamic world.



Problem We Solve

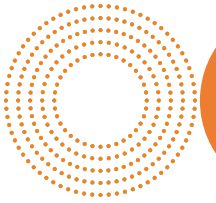
In the new Age of Acceleration, many nonprofits and government agencies are challenged by a lack of digital infrastructure. This gap inhibits their ability to keep pace and effectively support the most vulnerable populations.

Our Why

Tapp's mission is more than just business growth; it's about driving digital innovation across rapidly expanding sectors. We strive to transfer our knowledge, tools, and technology to government agencies and nonprofits that are tackling society's most pressing challenges.

How We Innovate and Impact

We achieve this by harnessing the power of artificial intelligence, developing high-impact websites, software, and data-driven campaigns. Our AI-enabled digital transformation strategies enhance the positive impact of the organizations we serve and amplify their engagement with the communities they support.



Community-Driven Impact



PA211.org
**GET CONNECTED.
GET HELP.**

TAPP **2-1-1** **United Way**
Pennsylvania Get Connected. Get Help.™ United Way of Pennsylvania

CLIENT SPOTLIGHT
State of California





60,000+ **EDUCATORS**
VIRTUALLY TRAINED

TAPP Gov

TAPP Gov **Delaware Pathways**
Navigating your journey to success

CLIENT SPOTLIGHT



Delaware Pathways
Navigating your journey to success

Delaware Pathways connects students, communities, and employers through high-quality career pathways.

RESOURCES FOR PARENTS & FAMILIES

GREATER BERGEN COMMUNITY ACTION

Making an Impact

50,000 PEOPLE SERVED	\$350 million INVESTED IN OUR COMMUNITIES OVER THE LAST FOUR YEARS	\$54.2 million IN GRANTS PAID DIRECTLY TO SMALL BUSINESSES
241,707	3,297	1,976



US Steering Committee

European Steering Committee




How Vituity Cares Launched and Scaled Social Impact

vituitycares FOUNDATION

INTERNATIONAL LITERACY ASSOCIATION **ILA WEBINAR**

Backed by Research, Fueled by Results: Comprehension Lessons That Work

literacyworldwide.org/ILAWebinars



How We Can Help You - [Learn More Here](#)

Strategy



Start with a technology audit and digital marketing game-plan to accelerate your growth and market share within your sector.

Creative and Branding



Make your brand stand out from your competitors to reach the right customers with the right message.

Web and APP Development



With our 20+ years of experience, we know your 24/7 salesperson must be beautiful, functional, and optimized for your goals.

Sales Enablement



We can help you close the loop between your marketing and sales teams—and more desirable deals.

Integration & Migration



Build bridges and knock down silos with simple and painless CRM integrations and migrations that are seamless to your team.

HubSpot Implementation



Ensure a smooth and successful transition from an alternative solution to HubSpot, without all the headaches.

Inbound Marketing



We provide the complete solution to increasing leads, revenue, and brand authority as a Platinum Hubspot Partner

Social Media Marketing



One of the most effective ways to engage influencers, customers and prospects to drive brand awareness, followers, and sales

SEO and Content Marketing



Build bridges and knock down silos with simple and painless CRM integrations and migrations that are seamless to your team.

E- Commerce



We deploy the transactional services and software you need to increase sales across all your audience touch points.

Paid Media



TAPP makes your budget go further with a targeted approach to reaching your buyer personas in search and social.

Public Relations



Defining the right audience and media channels to build regional and national brand recognition as well as thought leadership.



The Disconnect: When Systems Underperform



Why Nonprofits Invest in Technology

The intent behind every technology purchase is sound. The gap is in how these tools get implemented and used.



Retain Donors

Track supporter history, automate follow-up, and build long-term relationships.



Reduce Manual Work

Eliminate duplicate data entry, spreadsheet chaos, and lost follow-ups.



Coordinate Volunteers

Manage event attendance, applications, and communications in one place.



Grow Fundraising

Launch campaigns faster, target the right segments, and measure ROI.



Report on Impact

Demonstrate outcomes to boards, funders, and stakeholders with clean data.



Scale with Confidence

Support organizational growth without adding proportional staff overhead.

The Reality

Most nonprofits have the tools. Few have them working together.

63%

of nonprofits use 3 or more
different systems that are
disconnected and don't share
data

2x

the staff time lost each week to
manual data reconciliation and
re-entry

40%

of fundraising campaigns miss
goals due to poor data
alignment and targeting

Challenge #1: **Disconnected Data**

- **No single source of truth** — donor records live in your CRM, email tool, donation platform, and spreadsheets, each with different data.
- **Duplicate and conflicting records** — the same supporter appears in three systems with different names, emails, or giving history.
- **Manual exports and data entry** — staff spend hours each week moving data between systems instead of engaging supporters.
- **Missed signals** — high-intent donor behavior (email clicks, event attendance, web visits) goes untracked because tools aren't connected.
- **Reporting gaps** — you can't answer basic questions like 'who gave last year but not this year' because the data isn't in one place.



No connection. No shared truth.

Challenge #2: Siloed Teams

When fundraising, communications, programs, and leadership operate in isolation, your tools reflect that fragmentation.

Fundraising

Tracks donors in one system. Unaware of email engagement data held by the communications team.

Communications

Sends campaigns without knowing who recently donated, lapsed, or attended an event last month.

Programs

Manages client outcomes with no visibility into donor relationships or giving history.

Leadership

Receives reports from three separate sources with different numbers. Decisions slow down.



Challenge #3: Unclear Processes & Workflows

No documented workflows

Staff follow undocumented habits. When someone leaves, the process leaves with them. The next person starts from scratch.

Inconsistent data entry

Different staff enter donor data in different ways. Fields mean different things to different people. Reporting breaks.

Technology configured for defaults

Systems are set up based on out-of-the-box settings rather than the organization's actual goals and donor lifecycle.

Reactive, not proactive

Teams respond to problems after they compound instead of following a defined path that prevents them.

Challenge #4: Low Adoption & Training Gaps

A system no one uses is just an expense. Adoption is where most implementations fail.

01

Staff revert to spreadsheets

Within weeks of going live, teams fall back to familiar tools because the new system feels more complex than it is.

02

No role-specific training

Everyone receives the same generic onboarding. The fundraiser and the program manager need completely different workflows.

03

No adoption measurement

Logins get tracked. Outcomes don't. Leadership assumes the system is being used because it was purchased.

04

Training is a one-time event

A launch-day training session is forgotten within a month. Without reinforcement and refreshers, adoption declines.

05

No internal champion

Without a designated owner who knows the system and helps others, institutional knowledge never builds.

Quick Poll!

What is your organization's biggest systems challenge right now?

A Our data is scattered across multiple tools that don't connect

B Our teams work in silos and don't share information consistently

C We have systems in place but staff aren't fully using them

D Our processes are undocumented and inconsistently followed

E We don't have the right technology in place yet



Why Systems Fall Short

The Root Causes: Why **Technology Fails** Nonprofits

Technology is rarely the problem. Alignment is.

01

Strategy comes last:

Tools are purchased before the organization defines what success looks like or how data should flow.

02

Data without governance:

Without entry standards, field definitions, and clear ownership, data quality degrades fast and silently.

03

Integrations never completed:

Platforms were selected with integration in mind, but the connections were never built or tested end-to-end.

04

Tools without adoption:

Staff are given access but not trained on the why and how. Usage drops. Workarounds replace the system.

05

Strategy evolves, systems don't:

The org has changed. The technology setup from two years ago no longer reflects current goals or audience.

The Cost of Misalignment

When systems, strategy, and people aren't aligned, the cost shows up across every area of your work.

Donor Retention

Lapsed donors go undetected because no system flags them. Re-engagement happens too late or not at all.

Campaign Performance

Campaigns launch to poorly segmented lists because the data to segment properly doesn't exist or isn't clean.

Organizational Morale

Staff distrust the tools they're given. They stop logging data because they don't believe it's being used.

Staff Capacity

Hours per week lost to manual exports, data cleaning, and workarounds that a working integration would eliminate.

Reporting Credibility

Leadership and board receive conflicting numbers depending on who ran the report and from which system.

Strategic Decisions

Without reliable data, leadership makes decisions based on intuition, not evidence. Priorities misalign.

Questions Your Systems Should Be Able to Answer

These aren't advanced features. They're the baseline. If your systems can't answer them, you have a gap.

✓ Can you see a supporter's full history — gifts, emails, event attendance — in one place?

✓ Can you segment donors separately from volunteers, clients, and grant contacts?

✓ Can you run a fundraising performance report without exporting anything to a spreadsheet?

✓ Can you trigger a follow-up sequence based on a supporter's behavior — not just a date?

✓ Can you automatically send a thank-you within minutes of someone donating?

✓ Can you tell which email campaign, ad, or event drove your last major gift?

✓ Can you identify donors who gave last year but haven't engaged yet this year?

✓ Can you show your board a single, trusted dashboard for program outcomes and fundraising results?



What High-Performing Nonprofits Do Differently

What **High-Performing Nonprofits** Do Differently

- **They start with strategy, not software:** Before selecting or configuring a tool, they define the outcome, the workflow, and who owns what data.
- **They connect their systems intentionally:** CRM, email, donation, and reporting tools share data through structured integrations with defined sync rules.
- **They treat data as an organizational asset:** There is a clear owner, entry standard, and audit process for donor and constituent records.
- **They train for adoption, not just access:** Staff are trained on the why and how. Logins are only the starting point. Usage is tracked and supported.
- **They review and adjust on a cadence:** Quarterly reviews compare system performance against goals. Gaps are identified and closed proactively, not reactively.

The Alignment Gap

Strategy

What the organization is trying to achieve: mission, fundraising targets, community goals

Systems

The technology, tools, and processes in place to support daily work and donor engagement

Outcomes

The fundraising results, donor retention rates, and engagement numbers the organization needs

When these three are not aligned, technology fails to produce results — regardless of what you paid for the tool.

The 3 Pillars of System Performance

High-performing nonprofits build their technology strategy on three foundational pillars.

01

Unified Data

- Single source of truth
- Integrated platforms
- Clean, consistent records
- Real-time visibility

02

Aligned Teams

- Shared workflows
- Cross-team visibility
- Clear data ownership
- Consistent adoption

03

Consistent Process

- Documented workflows
- Standard operating procedures
- Regular review cadence
- Strategy-first configuration

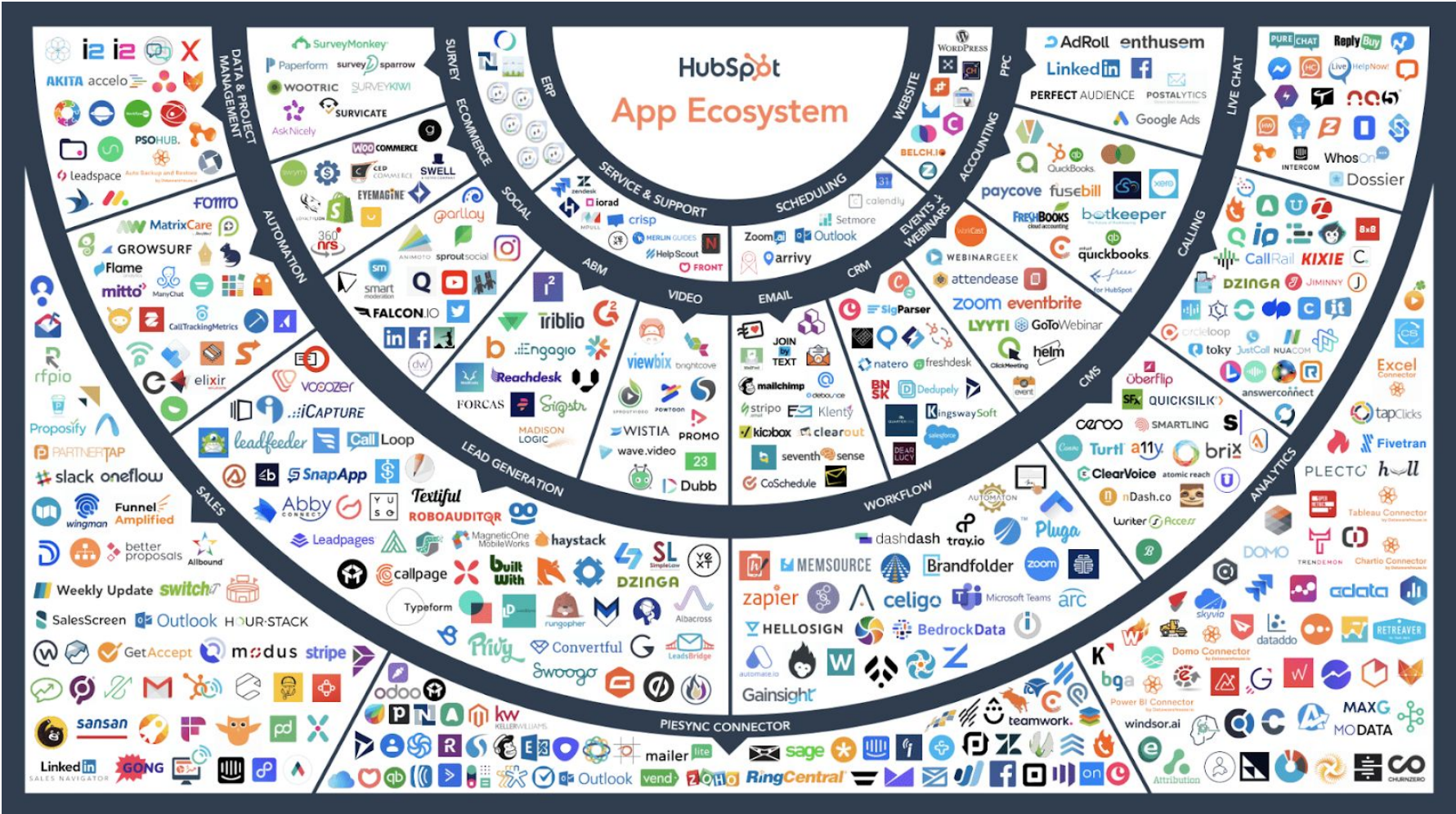
Pillar 1: Unified Data

- **Audit what you have:** Map every system that stores constituent or donor data. Identify overlaps, conflicts, and entry gaps.
- **Designate the master record:** One system (typically your CRM) becomes the single source of truth. All others sync to it on a defined schedule.
- **Standardize data entry:** Create naming conventions, required fields, and entry protocols that every team member follows consistently.
- **Build integrations, not workarounds:** Connect tools through native integrations or automation. Eliminate manual CSV exports for good.



What **Connected Data** Looks Like in Practice

A unified data architecture means every touchpoint feeds one record. No silos. No duplicates. No guesswork.



Pillar 2: **Aligned Teams**

Technology performs at the level of the team using it. Alignment starts with shared understanding, not just shared access.

Define data owners:

Every data category — donors, volunteers, grants, events — has one person responsible for its accuracy.

Build shared dashboards:

Leadership, fundraising, and communications look at the same metrics from the same source. Conflicts surface earlier.

Map cross-team workflows explicitly:

Donor lifecycle, campaign reporting, and volunteer coordination span departments. Build those handoffs in writing.

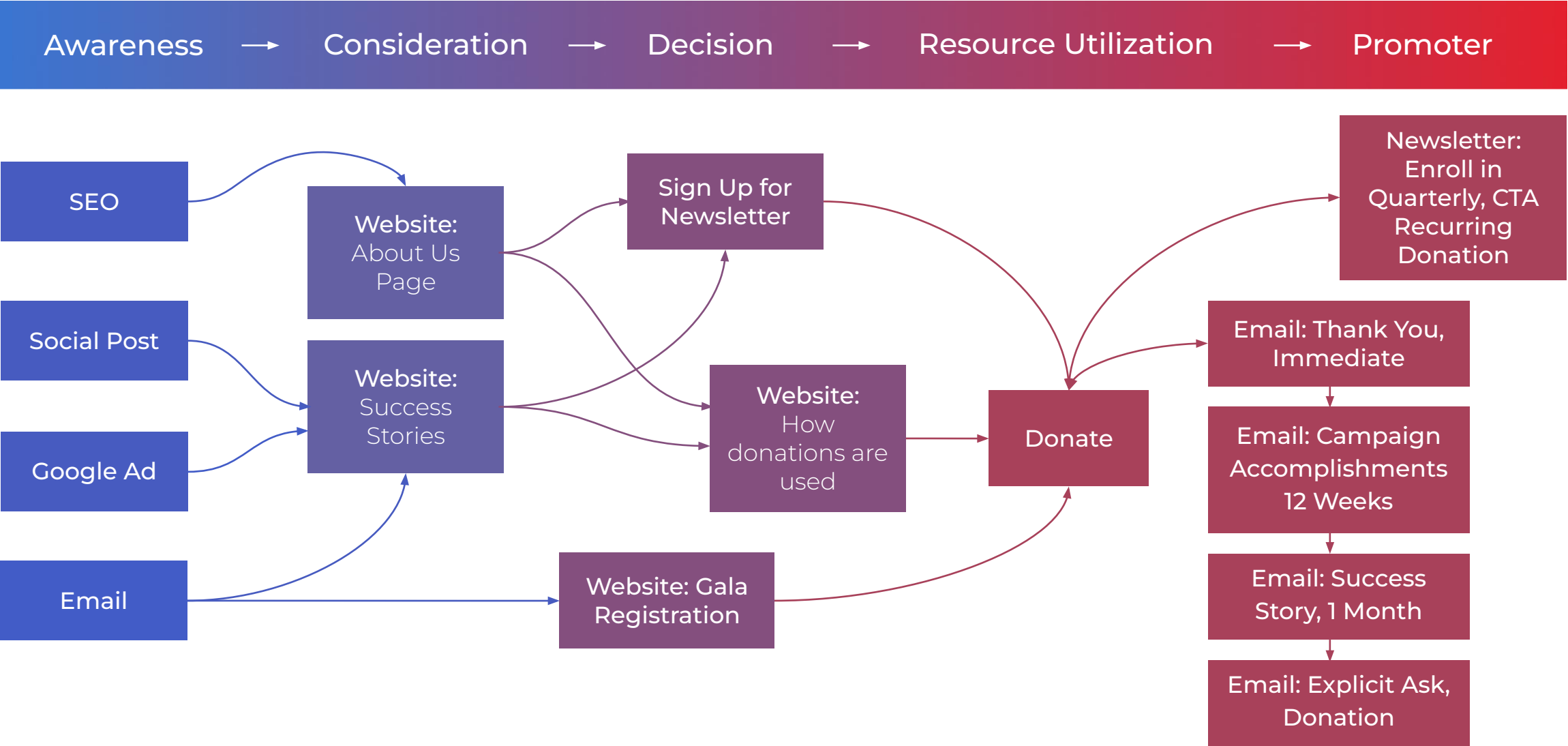
Treat training as ongoing:

Schedule quarterly refreshers. When workflows change, retrain. Don't assume that launch-day training holds.

Review performance together:

Monthly or quarterly joint reviews where all system-adjacent teams look at the same data in the same room.

Supporter Journey Map



Pillar 3: Consistent Process

1 Document your workflows

Map the full supporter lifecycle: new donor welcome, lapse re-engagement, major gift cultivation, volunteer onboarding. Write it down.

2 Configure to the workflow

Set up your CRM, automation, and email tools to reflect your documented process — not the vendor's default template.

3 Assign clear ownership

Every workflow step has a name attached. No orphaned tasks. No 'someone should follow up on this' ambiguity.

4 Automate the repeatable

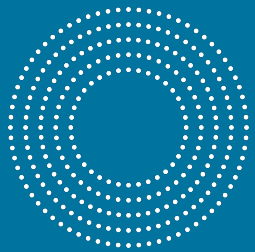
Use automation for follow-up sequences, data field updates, reporting triggers, and internal alerts. Free staff for judgment work.

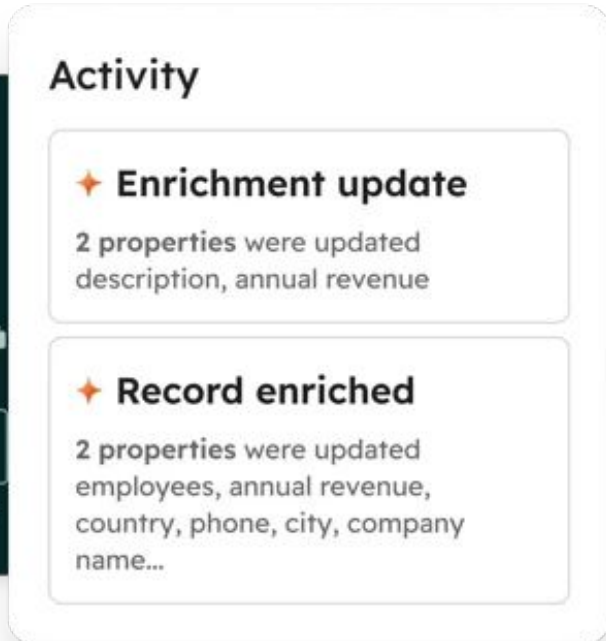
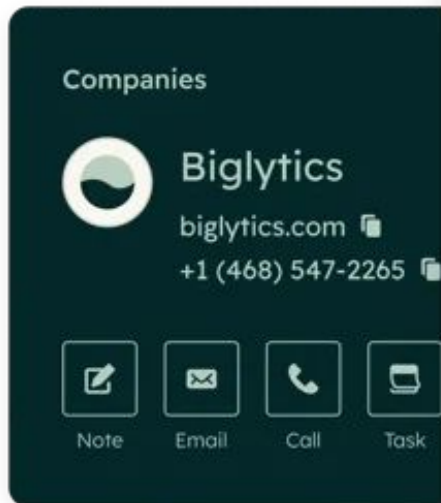
5 Review and improve quarterly

Set a standing review to compare process performance against results. Identify bottlenecks before they compound.



Smarter Automation: With AI





Data Hub

Keep All Your Supporter Data Clean and Connected

HubSpot's Data Hub helps your organization keep **contact data accurate** and **up to date**.

- Fixes duplicate or missing records automatically
- Connects data from forms, spreadsheets, and other apps
- Keeps donation and volunteer lists synced across your tools
- When your data is clean, your marketing automation runs smoothly — saving time and helping you reach the right people with the right message.

Let HubSpot's “Agents” Take Routine Tasks Off Your Plate

HubSpot now includes **AI-powered Agents** that act like helpful assistants inside your account.

Think of them as extra hands for your team — not replacements.

- Draft emails or social posts for review
- Suggest which contacts might be ready to donate or volunteer again
- Automatically follow up with thank-you notes or reminders
- Answer quick data questions (“How many new donors this month?”)
- These AI helpers save hours each week so you can focus on the mission, not the manual work.

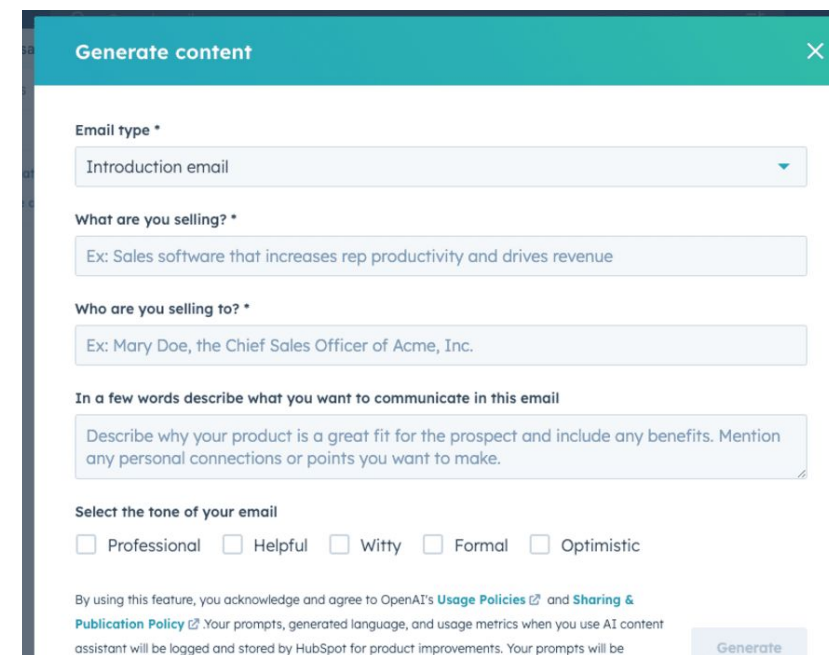


What **AI in HubSpot** Means for Nonprofits

You don't need to be an expert to benefit from AI. HubSpot now uses AI to **make your daily work easier**:

- **Personalized Emails:** HubSpot can suggest subject lines and content that fit your audience
- **Automatic Reporting:** View campaign results and donor activity instantly
- **Better Recommendations:** See which channels bring in the most support
- **Simple Setup:** Turn on tools as you grow — no coding or setup headaches

AI helps you **spend less time managing data** and **more time building relationships** that matter.



The screenshot shows the 'Generate content' interface in HubSpot. It features a teal header with a close button. Below the header, there are several input fields and a 'Generate' button. The fields include: 'Email type' (dropdown menu with 'Introduction email' selected), 'What are you selling?' (text input with example 'Ex: Sales software that increases rep productivity and drives revenue'), 'Who are you selling to?' (text input with example 'Ex: Mary Doe, the Chief Sales Officer of Acme, Inc.'), and 'In a few words describe what you want to communicate in this email' (text input with placeholder text). Below these fields, there are radio buttons for 'Select the tone of your email' with options: Professional, Helpful, Witty, Formal, and Optimistic. At the bottom, there is a small disclaimer about OpenAI's usage policies and a 'Generate' button.

Start with help



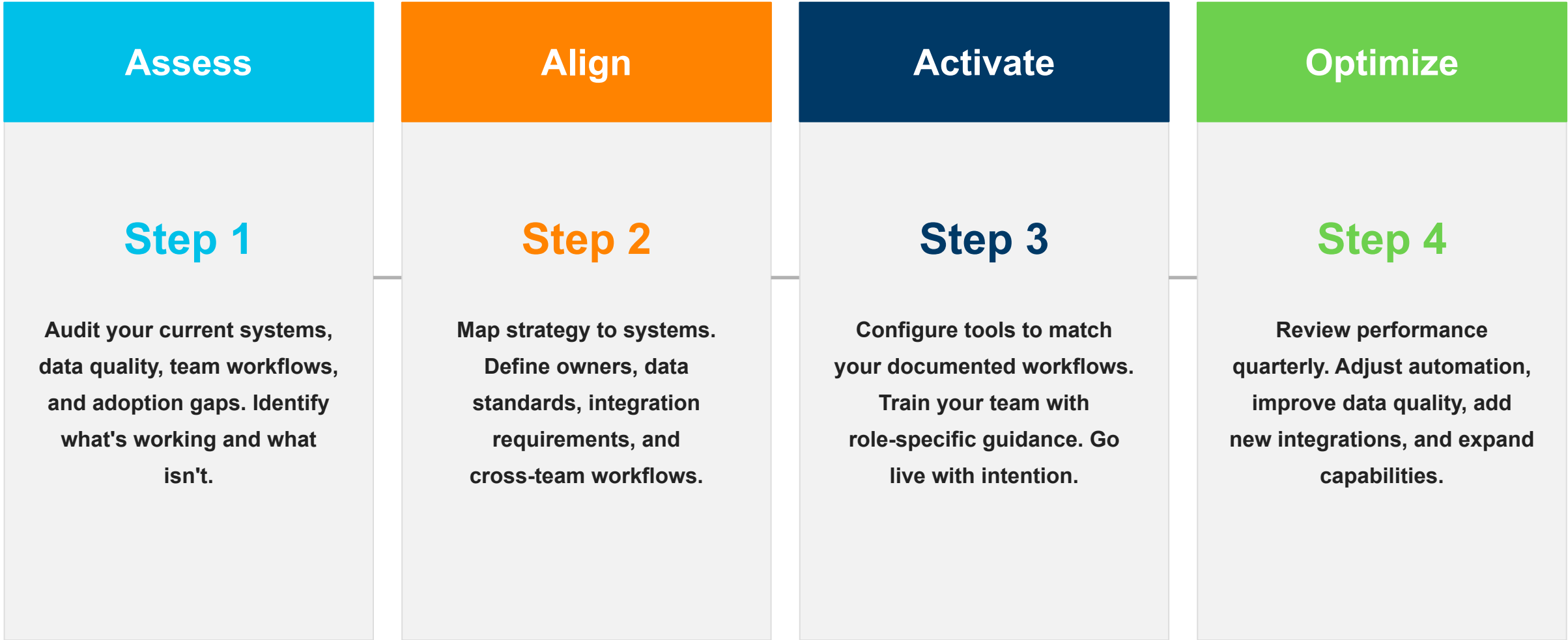
AI Report Generator

Generate a single object report fast with Breeze AI



A Framework for Action

The System Alignment Framework



Phases 1 & 2

Phase 1: Assess — Figure Out What You Have

- List every system that stores constituent or donor data
- Identify integrations that exist vs. manual workarounds
- Name the person responsible for each data category
- Trace a single donor from first touch to thank-you — count the gaps
- List the reports you can't run today. That's your missing data.

Phase 2: Align — Map Strategy to Systems

- Define success metrics for each system you use
- Select your CRM as the master record. All others sync to it
- Assign data ownership across fundraising, comms, and programs
- Build an integration map: what flows where, how often, in what direction
- Document your top 3 supporter workflows in writing

Phases 3 & 4

Phase 3: Activate — Go Live with Intention

- **Configure your CRM properties to match documented workflows**
- **Build automations for your top 3 donor lifecycle sequences**
- **Deliver role-specific training — not a single all-hands demo**
- **Set a 30-day check-in to catch adoption issues early**
- **Measure activation: usage rates, data entry compliance, automation fires**

Phase 4: Optimize — Improve Continuously

- **Run a quarterly review: compare KPIs against baseline from Assess phase**
- **Identify which automations fired and what outcomes they drove**
- **Fix data quality issues found in the review before they compound**
- **Add new integrations or automation as team confidence grows**
- **Re-document any workflows that have changed since activation**

Audit Your Current State: **Where to Start**

Q1: What systems do you currently use?

List every tool storing constituent or donor data. Include spreadsheets.

Q2: Do your systems share data with each other?

Map active integrations vs. manual exports. Each export is a risk.

Q3: Who owns each data set?

Can you name one person responsible for each data category's accuracy?

Q4: What does your team actually use vs. ignore?

Shadow your team for a week. Usage tells you more than configuration.

Q5: Where do campaigns start and end in your data?

Trace a single donor from first touch to thank-you. Note every gap.

Q6: What reports can't you run today?

The reports you can't pull reveal what data you're missing or not capturing.

Quick Wins to Unlock Value Now

You don't need a full overhaul to see improvement. These actions deliver results in 30-90 days.

Deduplicate your CRM

Identify and merge duplicate donor records. Improves campaign targeting and reporting immediately.

Build one shared dashboard

Create a report all teams view monthly: donor retention rate, campaign open rate, fundraising trend.

Run a data quality sprint

Spend 2 hours cleaning your top 500 donor records. Assign a field standard and update from there.

Activate email-to-CRM sync

Connect your email platform to your CRM so engagement data flows automatically — no exports.

Document your top 3 workflows

Write down your new donor welcome, lapse reactivation, and major gift cultivation sequences.

Set a monthly data review

Schedule a 30-minute cross-team meeting to surface data issues before they become reporting problems.



How Tapp Network Can Help



We help nonprofits get more value from the systems they already have — and build the ones they need.

[Schedule a Consultation](#)

How Tapp Network Can Help

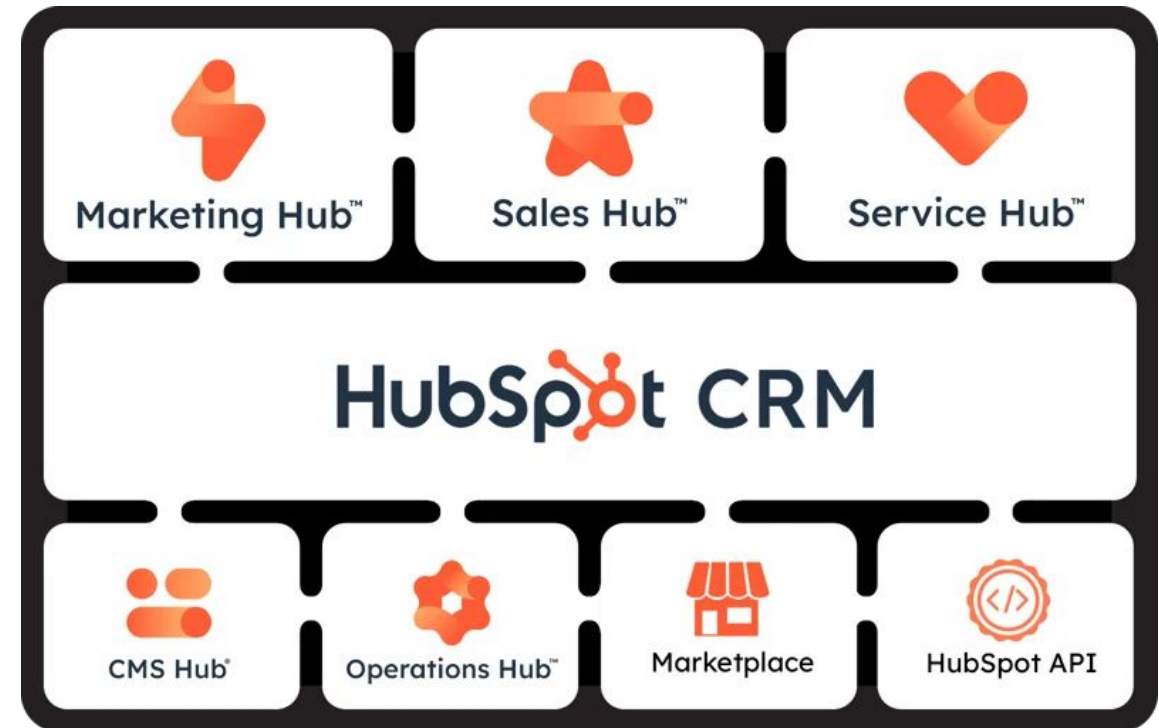
- **System Alignment Assessment:** Audit your tools, workflows, and data health. Deliver a prioritized roadmap with clear owners and timelines.
- **CRM Strategy & HubSpot Implementation:** Configure HubSpot mapped to your donor lifecycle. Migrate existing data. Train your full team.
- **Integration Architecture:** Connect your CRM, email, donation, and reporting platforms into one coordinated data ecosystem.
- **Role-Specific Team Training:** Staff training built around how each team member actually uses the system — not a generic demo.
- **Ongoing Optimization & Support:** Monthly or quarterly reviews to keep your systems performing as your organization scales.

techsoup

HubSpot

CRM Pricing

- HubSpot starts at \$20/month for nonprofits
- Reach out to us through Techsoup to learn more about HubSpot subscriptions and implementation services
- [Contact Us](#)





CRM Implementation

Implementing HubSpot CRM is a smart way to boost your nonprofit's efficiency. Starting at \$3,500, we handle the setup and configuration of HubSpot CRM, tailored to your needs. We optimize processes using HubSpot Sales Hub, equipping your teams with the tools and insights to attract donors more efficiently. We also design and execute targeted marketing campaigns, using smart content and personalization to boost engagement. Additionally, we provide training to ensure your team is confident using the system, with ongoing support options to help your nonprofit succeed.

[Schedule a Consultation](#)

**Contact us before Friday*



Affordable.Efficient.Impactful

Digital Marketing Retainer Packages

Standard (\$899/month)

- 10 Hours of Support/Unlimited Requests
- Access to Subject Matter Experts
- Includes:
 - CRM support
 - Social media and blog production
 - SEO analysis and support
 - Email production

Premium (\$1,299/month)

- 10 Hours of Support/Unlimited Requests
- Access to Subject Matter Experts
- Everything in **Upgrade** plus:
 - Custom development and design work
 - Automation and integrations
 - Expert-guided advice
 - AI and integrations
 - Training and collaboration
 - 1:1 support and planning

Artificial Intelligence (AI) Services for Nonprofits

Expand Your Reach, Streamline Your Operations,
Optimize Your Impact

LEARN MORE

All Services Overview

Managed IT Services

IT Help Desk Services

Microsoft 365 Services

Website Services

Digital Marketing Services

Intuit QuickBooks Services

AI For Nonprofits

Any Questions?

The screenshot shows the TechSoup website navigation bar with the 'SERVICES' dropdown menu open. The navigation bar includes the TechSoup logo, a location selector for 'United States', and menu items for 'PRODUCTS', 'SERVICES', 'MEMBERSHIP', 'RESOURCES', and 'HELP'. There are also 'LOG IN' and 'JOIN' buttons and a search icon. The 'SERVICES' dropdown menu lists several options, with 'Website Services', 'Digital Marketing Services', and 'AI for Nonprofits' highlighted with yellow borders. A 'TAPP Network' logo is also visible in the dropdown menu. In the background, a banner for 'Not a TechSoup Member Yet?' with a 'JOIN TODAY' button is partially visible.

techsoup United States ▾ PRODUCTS ▾ SERVICES × MEMBERSHIP ▾ RESOURCES ▾ HELP ▾ LOG IN JOIN Q

All Services Overview
Managed IT Services
IT Help Desk Services
Microsoft Services
Website Services
Digital Marketing Services
Intuit QuickBooks Services
AI for Nonprofits
Google Ad Grants Services
Grant Prep Boot Camp

TAPP Network

Not a TechSoup Member Yet?
JOIN TODAY

Thank You!



Tapp Network
info@tappnetwork.com
tappnetwork.com