



Matching

The first CRM-based Matching Gift solution built on top of Microsoft Dynamics, that integrates with your Donation Management system

A matching gift strategy should be an important fundraising component for all institutions. The biggest challenge that we see is that many institutions don't view matching gifts as a program; rather an administrative function. According to HEPdata, less than 1% of most Institutions annual giving comes from Employer matching. Compare this to institutions and that have a best practices approach in place for matching gifts and quickly that increases to a range of 8 - 10%! Think about that: by putting a matching gift program in place, the ROI associated with moving the needle from less than 1% to say just 5% brings enormous incremental donations into your annual giving support. The question is this...what does it take to put a program together? In short, it takes dedicated people, data, systems, and processes. In conjunction with our partnership with HEPdata, xRM has an innovative approach to help build your program cost-effectively and integrated with your legacy or next-generation Donation Management platform.



**THANKS
FOR YOUR
DONATION**
WE APPRECIATE YOU

- Identifies all new gifts that are matching gift eligible, regardless of source — offline, web donation page, social, crowdsourcing, phonathon, etc.,
- Engages with your donors making easy for donors to complete their application
- Provides an Admin Portal that tracks the status of matching gifts through a customized Dashboard.

What does xRM Matching Do?

- ✓ Automates follow-up for matching gift opportunities through branded drip email.
- ✓ Tracks status of matching gift opportunities in real-time.
- ✓ Alerts you when forms have been submitted.
- ✓ Links to third-party payors (Benevity, Cybergrants, YourCause) for easy certification.
- ✓ Drives all matching gift opportunities to completion.
- ✓ Custom emails delivered as often as you would like to remind donors to submit paperwork.
- ✓ Tracks when forms are submitted.
- ✓ Identifies all eligible matching gifts processed online or offline (i.e., manual entry, via donation page, social giving, mobile, phonathon, etc.)
- ✓ For all donors that have given over the last 12 months, generates a report that includes their employer and donation amount.
- ✓ Identify all employers in your constituent file that have matching programs and have HEPdata run an Automatch to determine eligibility and respective ratios. This will enable you to build a ROI model.
- ✓ Engage donors that work for matching gift eligible employers by using xRM Matching.
- ✓ Simplifies the ever so critical step of applying for funds by essentially handfeeding all the information to the respective party.
- ✓ Receive incremental Funds that you never knew were available to you, and most importantly, celebrate the win!



Did you know?

- 💰 7-10% of your total annual giving should come from employer matching if you invest in a managed Matching Gift Program?
- 💰 If a Matching Gift Program is not in place, according to HEPdata, they are reporting that their Clients are yielding less than 1% of their annual giving is coming from Matching Gifts.
- 💰 On average one in ten donors is matching gift eligible.
- 💰 The ExxonMobil Foundation donated a record gift of \$1.31 million gift to The University of Texas at Austin. This donation was a match of 353 unique gifts made by the company's employees and retirees during that year and surpassed the record-breaking amount given to UT Austin during the previous year by 10 percent.
- 💰 13% of companies match at 2 to 1 or better.
- 💰 70% of Fortune 500 companies have a matching gift and volunteer program.