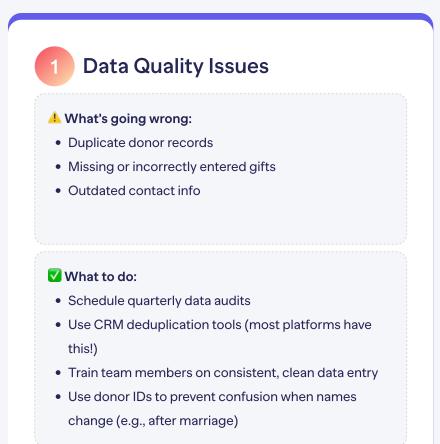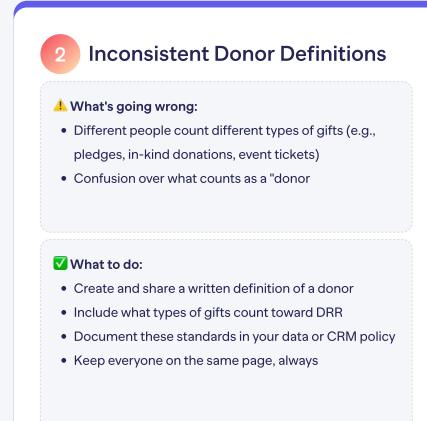# Rally Up

Training Guide: Tackling Common DRR Tracking Challenges

1 Data Quality Issues

⚠️ **What's going wrong:**
- Duplicate donor records
- Missing or incorrectly entered gifts
- Outdated contact info

✅ **What to do:**
- Schedule quarterly data audits
- Use CRM deduplication tools (most platforms have this!)
- Train team members on consistent, clean data entry
- Use donor IDs to prevent confusion when names change (e.g., after marriage)

2 Inconsistent Donor Definitions

⚠️ **What's going wrong:**
- Different people count different types of gifts (e.g., pledges, in-kind donations, event tickets)
- Confusion over what counts as a "donor

✅ **What to do:**
- Create and share a written definition of a donor
- Include what types of gifts count toward DRR
- Document these standards in your data or CRM policy
- Keep everyone on the same page, always

3 Limited Resources

⚠️ **What's going wrong:**
- Small teams stretched thin
- No budget for fancy analytics tools
- Manual tracking = burnout

✅ **What to do:**
- Use free or low-cost CRMs (e.g., Little Green Light, Bloomerang Lite)
- Start with annual DRR tracking—don't overdo it
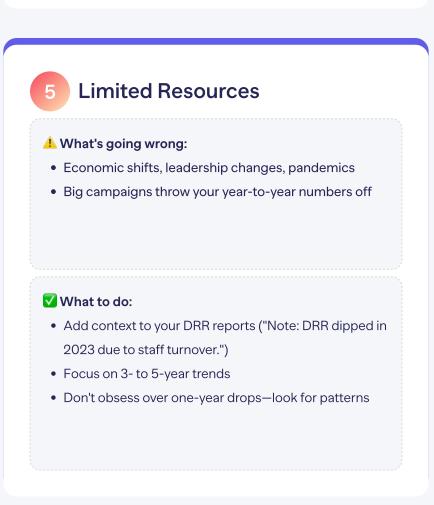- Use Google Sheets or Excel with simple formulas (COUNTIF, VLOOKUP)
- Automate what you can, even if it's basic

4 Attribution Confusion

⚠️ **What's going wrong:**
- Donors come from multiple channels (online, events, mail, etc.)
- You can't tell which campaign brought them in
- Hard to slice DRR by acquisition source

✅ **What to do:**
- Tag all donors by source in your CRM (e.g., "Fall Gala 2024", "Email Appeal Q1")
- Build reports that compare DRR by source
- Use this data to invest in what works—and cut what doesn't

5 Limited Resources

⚠️ **What's going wrong:**
- Economic shifts, leadership changes, pandemics
- Big campaigns throw your year-to-year numbers off

✅ **What to do:**
- Add context to your DRR reports ("Note: DRR dipped in 2023 due to staff turnover.")
- Focus on 3- to 5-year trends
- Don't obsess over one-year drops—look for patterns

Quick Reference: DRR Do's and Don'ts

DO
- ✅ Audit and clean your data regularly
- ✅ Define "donor" clearly for your team
- ✅ Start with annual DRR, scale up later
- ✅ Tag donor sources from Day 1
- ✅ Look at long-term DRR trends

DON'T
- ❌ Assume your CRM is always clean
- ❌ Count ticket buyers or volunteers by default
- ❌ Burn out your team with weekly reports
- ❌ Guess where donors came from
- ❌ Panic over one down year

Master these challenges to build a robust DRR tracking system that drives better donor relationships and sustainable growth.