

“You Can Revolutionize Your Fundraising Analytics with Claude”

Webinar Q&A Summary

In July 2026, Civis Analytics presented at a webinar hosted by the Nonprofit Times on how to use Claude to accelerate fundraising analytics. The questions and answers from the webinar are below, the responses provide a helpful guide for Claude best practices, in general.

Read more [here](#).

What are the key best practices for building fundraising dashboards with Claude?

Use the four key fundraising tables:

A gift table, a master donor table, a campaign history file, and a finder file (to identify direct mail recipients). In the initial prototyping phase, Claude can also autogenerate its own rich, mock data set based on the context provided. We recommended following data analytics best practices by cleaning up your data before feeding it into AI tools to achieve the best results.

You can connect to an external data source or upload Excel (but be careful here):

For the initial prototype, the report was developed inside Claude using mock data. Once perfected, it was passed to technical team members who connected it to a live database set within the Civis Platform. Depending on how your data is stored, you can connect your database or CRM directly to Claude and other AI tools. We recommend against uploading spreadsheets into tools since that can create confusion with version history and source of truth.

You can build one-time report or connect to your dashboard to a database / data warehouse to get more real-time data:

The prototype itself was a point-in-time, static report. However, the team transitioned it into production on the Civis Platform so that it updates dynamically using automated scripts.

You can connect Claude to your spreadsheet in Google Drive, but it's not straightforward.

While Google integrations might offer a way to rig a dynamic update, that would require more technical setup than Claude offers out-of-the-box. You can easily import an Excel or spreadsheet file to create a dashboard. However, it will not automatically update in real-time on its own.

Claude doesn't have built-in verification out-of-the-box, so you'll need to check your analysis:

AI-generated outputs should be verified, as AI can make mistakes. To help with this, users can leverage Claude to interrogate how analysis was generated and review the work, or ask follow-up questions to clarify the approach. Depending on the implications of your analysis, it's a good idea to loop in data experts before moving forward with AI-generated answers.

Why Choose Claude over another LLM?

You can use any LLM, but we've found some key advantages with Claude.

We've found that Claude's specific structure, its "Skills" integration, and its ability to connect directly with our system (Civis Platform) make it a powerful combination for fundraising analytics

What kind of security measures do I need to take?

We recommend masking PII.

We recommend using a unique ID - from either your CRM or data warehouse - and mapping back to the individual person rather than names, addresses, or other sensitive details.

...But there's some technical set-up to do it:

This involves setting up database views that exclude PII columns while retaining database IDs. For safe testing, organizations can start by prototyping with dummy data to bypass security concerns entirely.

Claude doesn't provide NCOA / CASS out of the box, so you'll need to use another tool.

The Civis platform has built-in features for NCOA, CASS, and identity resolution. The panel recommends running raw data through these standard platform tools first, and then pointing Claude only at the pre-cleaned data. Pointing Claude directly at raw PII is not advised.

How do I know if I've created enough context to make Claude (or another LLM) successful as my self-service analytics tool?

Claude is remarkably effective at building data sets from very little initial information, but you'll need to continue to teach it.

If a generated report looks wrong, you can converse with Claude to correct its assumptions and review its analysis approach. Over time, as you build specific "skills" and definitions into the Civis Platform, Claude requires almost little or no prompt context because it pulls directly from the pre-established definitions.

As an example, Claude can absorb your business knowledge on direct mail vs. online giving to create attribution match-back reporting.

Traditional CRM tracking only counts physical check responses, which can falsely suggest that direct mail is failing. By establishing attribution windows and comparing response curves, the team proved that direct mail campaigns drove massive online donation lifts (upwards of 45% to 50% in gift count). This insight is vital for justifying marketing budgets and optimizing the future.

If you want additional demographics, you can use your CRM data or from a data enhancement provider like Civis.

For the prototype, Claude fabricated the demographic data shown in the report. In practice, Civis offers a base demographic file for reporting and optional data appends. This allows fundraisers to analyze real people and their motivations, rather than relying strictly on transactional segments.

Do I need to be a Civis client to be able to use Claude or other AI tools for fundraising analytics?

Not at all — Claude is a “self-service” tool that can connect to your data system of choice. This could be Civis or another data platform.

Additionally, you can connect to spreadsheets, but those spreadsheets won’t update easily as you get new data, and it might create security risks if people accidentally use CRM extracts that contain PII or other privileged data. And Claude is also not the only AI tool that provides similar capabilities but the examples provided were produced using Claude.

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