How the phone can be used to create amazing experiences

Project 11e. Telephone

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For senior management and trustee boards, this project will:

- Help their understanding of how the telephone can be used successfully to engage with donors and supporters.
- Show how the telephone should not be used in isolation, but in collaboration with other fundraising channels and techniques.
- Promote the effective use of the phone by making sure fundraisers have vulnerability policies in place and they undertake regular mystery shopping of calls.

For donors, this project will:

- Give donors choice and control over how they receive telephone calls from fundraisers.
- Improve the quality of telephone calls they receive from charities' by using well trained and supported representatives.
- Improve the quality of telephone calls they receive from charities' by reducing scripting and having more personalised conversations with donors.

Summary Principles

The telephone is a powerful and engaging channel of communication to reach donors and supporters when it is used within a multi-channel communication strategy. The telephone should be used to **engage** with donors and supporters to build true relationships and should not be solely used as a fundraising channel in isolation.

When considering telephone activity consideration should be given to all steps outlined below. Activity undertaken on the telephone **must**;

1. **Be collaborative** and **run in partnership -** trustees, Chief Executives, senior managers, fundraisers and agencies (if used) must have **shared objectives** and an **agreed plan** for delivering those objectives. Take time to develop and agree the objectives and truly understand how they can be implemented and delivered upon at a detailed level. Challenge anything that doesn't 'fit' or conflicts with another objective and don't give up.

2. **Be evaluated by a wider range of metrics than year one return on investment and take a long-term view** – focus on more than just financial metrics as measures of success. Since the strength of the phone is often most seen in delivering long-term income via Direct Debit, year one metrics are rarely appropriate for measuring its success and can lead to poor decision making. Donor satisfaction, quality of conversations, retained permission for future contact and attrition can and should also be used to measure success. Review campaigns from previous years and look at the development of those donors over time. Campaigns should be an element of the donor journey and do not happen in isolation – look at results and outcomes beyond the specific campaign results. See CDE project 3 – *Satisfaction and commitment*.

3. **Think 'case study'** – plan, analyse and review each activity as though you intend to make a case study to **share best practice**. Question what have you learned from the activity and what could you do better to deliver the objectives and requirements of the donors and the organisation. You can then share and learn from others too.

4. Be **respectful**, - conducted with consent from donors, and conducted at times that are welcomed by the donors. Consider your audience and, if possible, when *they* believe it would be appropriate to be called on the days of the week and calling hours planned. Use the opportunity to retain consent for continued contact across the multi-channel communication strategy.

5. **Give donors choice and control –** allow donors choice and control in how their relationship works, consent calls are a perfect example of asking donors what they want to hear about and when – from this information charities can determine a donor journey that is relevant, timely and personalised to each donor. Consider using more 'open' or 'range' ask approaches rather than the traditional 3-ask negotiation approach

to give the donor choice and control in the level of their donations. See CDE project 13 – *Giving donors choices and managing preferences*.

For example, an 'open' ask would simply be 'How much would you like to give towards this work?' while a 'range' ask would be, 'People we're speaking to are generally giving between £5 and £15 towards this project, what would suit you?', or, 'Would you like to give £10, £30, or £50 tonight?'

6. **Utilise information effectively** – capture, store and utilise donor motives for getting involved with a charity. This information should then be used to guide all subsequent conversations across all channels**.** Telephone calls can be used to establish how donors wish to be contacted and which 'products' are most relevant to them. The information can then be used to personalise the relationship with **timely** and **relevant** contacts.

7. **Recognise that charities must balance** their duty of care to beneficiaries to ask, against supporters' and potential supporters' right to say "no". Donors should never feel unduly pressurised to receive telephone fundraising calls, or to comply with any requests made of them. They should have a clear understanding of why they were asked, and always end the conversation feeling valued and in control.

8. Be **properly resourced** – whether using an agency, or run in-house, sufficient budget and staff resources should be allocated to the telephone to ensure a quality experience for donors. In particular, agency partners should never be chosen on price alone, but on a range of quality indicators. See CDE project 21 – *Working with suppliers as partners*.

9. Have **well trained and supported representatives making calls** – telephone calls are truly acting as the 'voice of a charity' and therefore a true investment must be made to ensure that the callers have a positive environment and experience when making calls. They should be well trained, briefed and supported in their work and should be paid above the minimum wage.

10. Be **transparent** – state your purpose of the call *clearly* and *in full* at the beginning of the call. Provide clear signposting throughout as to what will happen next and the options available to the supporter. Don't try and disguise fundraising as something else. This is in line with the Fundraising Regulator 'Code of Fundraising Practice', section 8.3.1.

11. Be **engaging** – telephone calls should involve a dialogue not a monologue. Plan the conversations and identify opportunities to encourage donors to get involved. Lead donors to value, not fear, the calls. Calls should invite involvement from donors and

supporters and should avoid replicating a direct mail pack where information is pushed to the donor. Before calling consider the experience from the donor's perspective, if you can't deliver a positive experience, irrespective of the outcome, don't make the call

12. Be **natural and flexible** – calls should not follow a set script that must be read verbatim. In order to achieve a truly engaging call fundraisers, should listen and adapt and have personalised conversations with each donor

13. **Humanise the experience –** avoid 'robotic' sounding scripts being read by fundraisers making the calls. Try to find the 'joy' in each conversation and strengthen the connection between donor and charity by delivering to meet the donors' needs or expectations. For further information please see the Save the Children case study later in this document.

14. Recognise that donors may also be **service users / beneficiaries –** this can be reflected in the one-to-one conversations taking place.

15. **Be more than just 'an ask' –** telephone calls should deliver a true value exchange giving the donor rewards that are important to them, in order to retain commitment and engagement for the long-term. Calls purely to thank and inform donors of the impact of their gifts can give donors a pleasant surprise, given the paucity of their use across the sector. Consider running consent campaigns to clarify donor consent and use this as an opportunity to re-engage the donor to the cause and mission. Legacy calls to establish interest in and motivations for leaving Gifts in Wills can be achieved without including a financial ask. The insight gathered can be utilised to determine the stewardship path that is relevant for each donor

16. **Recognise potential vulnerability** in both those being contacted and those planning and making the calls. The telephone does not afford any visual indicators that vulnerability may be present and therefore callers must be trained to recognise and supported in their handling of these calls. A vulnerable people's policy which safeguards donors, beneficiaries and staff should be created and adopted. Ideally each charities policy should be publicly available. Use the guidance provided by the Institute of Fundraising to help shape your policy and seek out external help. You are not the only organisation facing this issue, so do learn from others in and outside of the sector. See CDE project 2 - *Fundraising and vulnerability.*

17. Be **effective and bring resolution –** ensure that all aspects of each call are addressed including questions are raised by donors / supporters. If answers cannot be provided immediately, ensure that someone takes ownership of the outstanding items until they have been resolved

18. **Utilise the information and insight** gathered during the conversations irrespective of the outcome of the contact. Ensure that this is contained within data files that are used for follow-up activity e.g. thank you or follow-up letters. In addition, use the insight when planning and implementing subsequent contacts across all channels employed in the communications strategy.

THE COMMISSION ON THE DONOR EXPERIENCE

How we arrived at these Summary Principles – our approach

We took a two-pronged approach to reaching the summary principles we have laid out above:

- A series of **8 workshop sessions**, held in over the summer of 2016, attended by representatives from both charities and agencies

- An **online survey**, sent in February 2017 to members of the Commission's e-newsletter list, selected online discussion groups dedicated to fundraisers, and CASE Europe's Admin-DEVELOP discussion list (used by fundraisers in the higher education sector). This received 93 complete responses - 82 from staff in charities, and 11 from staff working in telephone fundraising agencies.

- A full breakdown of the survey results and free-form comments is available in Appendices 1 and 2

Key Findings

There was a wealth of insight and information that came out of the contributions to our workshops and survey. We are hugely grateful to all who gave their time and thoughtful responses. We would like to highlight what we believe to be **6 key findings** around charities' use of the telephone in delivering a high-quality donor experience. The key findings from the research were an echo of the discussions and sentiments shared in the workshop sessions.

1. **Satisfaction with use of the telephone**

In our survey, on average charities graded their own satisfaction with their current programme of telephone engagement with donors and supporters at **6.3** out of**10** and agencies at **7.8** out of **10**.

When asked how satisfied they thought *supporters* were with contact, charities again rated this on average at **6.3**, and agencies at **7.8**.

From the free-form comments, it was clear that agencies' assessments of supporters' satisfaction were more likely to be based on their own monitoring of satisfaction via methods such as SMS surveys sent after calls; whereas charities were more likely to qualify their assessments as a best guess, based on little or no monitoring of the same.

44 of the 82 charities who responded (54%) rated their own satisfaction with their programme at 7/10 or greater (8/10 was the modal response for this question). But nearly a third of respondents rated their satisfaction at 5/10 or less.

Charities' dissatisfaction with their programmes was most likely to be influenced by internal factors, including, for many of them, a feeling that the telephone was an unappreciated resource for supporter engagement:

> "*It is out of house and, for the rest of the organisation as a whole, it is an out-of-sight out-of-mind attitude to what is a crucial communication opportunity*"

"It feels like a fresh approach is needed. Many have heard the same type of call before. I feel income generation is viewed as more important internally than donor satisfaction. I would prefer us to think more about the benefits of relationship fundraising."

These comments particularly surfaced when we asked charities what they felt the biggest barrier to making improvements to their telephone programme would be. Regulation and available budget figured significantly here, but lack of commitment in senior management culture was also frequently referenced:

"…internal systems within the charity"

"Time to work on this and buy in from others outside of fundraising e.g. trustees"

"The conception that a telephone fundraiser's opinion is less important than a 'DM expert's' opinion."

"Lack of understanding of such programmes by management"

"Cultural change to get department less focused on ROI[1] and CPA[2]"

This was mirrored by agency responses to the 'biggest barrier' question in the survey:

"Lack of will to test new approaches and recognise the value of dialogue in any supporter engagement program"

"Short-termism of clients and pressure to generate immediate income"

"…turnover/internal problems within charities creates significant problems. They don't tend to have the resources internally and struggle to get approval to recruit or pay their agency to help with this. The value of long term planning and adequate resource allocation seems to get lost among short-term thinking and pressure on charities to raise more income, more quickly, and as cheaply as possible."

2. **Selection of agency partners/evaluation of in-house teams**

[1] Return on Investment (generally 12 month only)

[2] Cost Per Acquisition

Despite the comments above, charities did not cite price or year one ROI as their major criteria for selecting agency partners, or evaluating their in-house team. In both cases the quality of supporter engagement provided by the agency or team was top of the list, averaging a score of 2 (on a scale of 1 – 6). When asked how they felt charities selected them, agencies agreed with this, scoring it at an average of 2.7.

However, agencies and charities disagreed on the importance year one ROI had in charities' assessments of them. Nearly half of charities (45%) ranked this as the least important factor in their assessment of agencies, whereas 72% of agencies ranked it among the top 3 criteria by which they felt they were assessed. This focus from charities emerges more strongly when the issue of non-financial calls was discussed.

3. Agencies' perceptions of clients' strategic thinking

We asked agencies how strategic they felt their clients to be in the use of the telephone. None felt their clients were very strategic – 75% of agency respondents felt they were moderately so, and 25% felt they were not very strategic at all. This comment sums up the feeling:

"*Whilst there are exceptions to this rule, the majority of day to day contacts [with clients] are focused on commercial KPI's. They are very often short term as well. As such, all conversations are framed around the return possible from an individual campaign, and any testing/development can be stunted by a desire to be more 'tactical' than 'strategic'*"

4. Willingness to make non-financial calls

One of the principles of relationship fundraising is that donors and supporters should not be asked for money in every interaction – relationship fundraising thinking in both the UK and US suggests that communications that thank and show donors the impact of their giving are as important an element for building long-term loyalty, even if they may not generate an immediate financial return.

And yet, in Penelope Burke's 2002-3 survey of US-based donors, 94% of donors said they never received a telephone call that did not include an ask for money[3].

Of the charities in our survey, 36 respondents (45%) said they regularly made non-financial calls to their donors and supporters. The remaining 46 (55%) said they only occasionally, or never, did this.

The range of responses around this was illuminating. For some respondents it was not seen as a top priority for their telephone programme:

> "*We'd like to - hasn't crept to top of screamingly urgent things to do*"
>
> "*We occasionally make 'thank you' calls to recent donors, but they are not always a priority. We do not (but I would like to) make calls to recent grads that welcome them*

[3]'Donor-centered Fundraising', Penelope Burke, 2003

as an alum and set out expectations of the contact they will receive from us (even, dare I say, ask them how they want to keep a relationship with us moving forwards). Opportunities to call donors who have given recently or on a landmark anniversary gift are not taken (perhaps only where there is a face-to-face fundraiser involved who personally knows the donor)."

However for other respondents this was a central part of their use of the telephone:

> *"Our use of the phone is focused on stewardship."*
>
> *"We make calls every day thanking donors for giving."*
>
> *"It is far better to maintain a friendly relationship than to keep asking in our experience. The money follows in a more natural way."*
>
> *"I call when I don't hear from a donor. Just a knock at the door to know they are alright."*
>
> *"Happy birthday calls and thank you calls!"*
>
> *"We have a quick survey comprised of 7 questions, which gives us insight in the method of fundraising that acquired them, their preferences for ongoing communication, and allows us to improve the method of fundraising that they responded to."*

When asked the main reason why they did <u>not</u> make non-financial calls, the two main reasons cited were budget and capacity.

We asked agencies if they regularly recommended their clients make non-financial calls. The vast majority of respondents (82%) said they regularly did so. However only just over a quarter of respondents (27%) said their clients regularly accepted their recommendations. 73% said their clients only occasionally, or never, did so. The single most common reason cited was that all their telephone activity had to show an immediate financial return:

> *"Many see it as an additional cost with no income line on their budget. We would suggest tracking a donor's activity after a non-financial ask: retention, additional gifts, other activity etc. But they don't seem to be great or have the resources to track this effectively and show the positive impact. Sometimes these campaigns have been planned in and are then moved or cancelled last minute so it can be difficult to commit to this type of work and if a cost needs to go, it's usually this type of campaign (as they see it as saving cost and not losing income). Some clients however are great at including non-financial ask campaigns and do value them. Donors are very receptive and will share information if they are given the opportunity. Unfortunately, many are still surprised when they receive a call that isn't asking for money...goes to show that it's not yet the norm!"*

This suggests that Penelope Burke's survey might have returned the same results if run in the UK. Another agency respondent expressed the same frustration:

> *"We have always suggested this, for 10 years or more, and clients have not done it because of pressure on short term return on investment. It's not individual clients' fault. It is the culture and expectation that charities and fundraisers should maximise ROI. I have a real problem with ROI as a measure of fundraising success….A huge chain of charity shops I am aware of generates a modest margin - but makes a massive gross contribution to the income of the charity."*

This links strongly back to the issue of internal culture that surfaced in our 'barrier' question.

5. Metrics used to evaluate calling, and monitoring of supporter satisfaction

Despite saying that they primarily evaluated agency or in-house teams on the quality of supporter engagement they provided, the vast majority of charity respondents said they primarily used metrics such as contact rate, conversion levels and average gift to evaluate calling. Only 21% said they used other metrics. Those who cited 'other' metrics did measure quality assurance of calls, and one respondent cited commitment levels, but there does seem to be a profound disconnect between what charities say they value, and what they actually measure.

Our perception of disconnect here is strengthened by the response to our question about whether charities monitored the satisfaction of supporters with their calls. Less than 20% of respondents (18.75%) said they regularly did this. Many who did not acknowledged that they should be doing so.

However there were some examples of best practice in the comments:

> *"I listen to circa 120 recorded calls each month, randomly selected. It started off as a mystery shopping exercise, but I learn so much from doing it that I look forward to the task."*

> *"Live listening every week for 60mins on a campaign (where there are multiple campaigns running we only do one session), 3-5% of call recordings monitored per week across campaigns"*

> *"Each call is in effect a donor satisfaction monitoring exercise."*

Agencies reported having the capability to do this, but little interest from clients:

> *"We have this capability but often clients do not wish for us to use that facet of our service."*

> *"We have a feedback survey platform - however only one client has used it so far."*

6. Investment in testing new approaches to using the telephone

"A lack of appetite amongst clients to test and try new models and approaches means that the act of telephone calling has become fairly formulaic from a supporter's point of view."

So said one agency respondent when asked how satisfied they felt their clients' donors and supporters were with the calls they received.

Nearly **90%** of charity respondents said they had no formal budget for testing fresh approaches to using the telephone. **64%** of agency respondents said the same.

Which leads to the question – where is new thinking and practice around the use of voice to voice communication (thinking more widely than just the telephone for a moment) coming from? From the sound of responses to this question, it is coming from maybe a handful of agencies, but no more.

> "*I have asked for this for 5 years. Never get it*" said one charity respondent.

We believe this to be very different from the approach that charities take to their other direct marketing activities – direct mail, digital, etc. Perhaps the telephone is indeed the most 'below the line' of 'below the line' activity.[4]

Luckily, we have received some case studies of innovative approaches to using the phone – from both large and small charities, which are included on pp14 – 29.

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[4] "Below-the-line advertising is an advertising strategy in which a product is promoted in mediums other than radio, television, billboards, print and film. Types of below-the-line advertising commonly include direct mail campaigns, trade shows and catalogues, and targeted search engine marketing." Investopedia

Conclusion

The telephone, or voice to voice communication in general, *should* be one of the most effective engagement channels available to charities.

It is a truly one-to-one communication channel at a fraction of the cost of an in-person visit. When done well it can be both personalised and engaging, building increased understanding and support from both sides of the relationship. Therefore, the telephone has a key role to play in enhancing the donor experience with charities and should be utilised for pure engagement and service delivery as well as fundraising. Not every telephone conversation with supporters and donors should contain a fundraising ask.

However, it is also clear from our conversations and research that it is very unevenly appreciated by the charities who use it, and not given either the share of strategic thought or budgetary resource that will allow it to be welcomed by donors, rather than tolerated.

What is of particular concern is the commoditisation of the telephone. An insistence from senior leadership on short-term metrics, such as year one ROI, is stifling innovation and the chance to engage in true relationship building with donors and supporters. The more that charity telephone calls only contain financial asks, the less welcome they become to donors.

Telephone fundraising urgently requires a fresh approach. We recommend you take particular note of the way in which Save the Children has recently rethought all of its telephone activity (p14). But we also commend the other two case studies so generously offered to us, from charities large and small. There is so much more potential in the phone than is being utilised.

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An economics and business graduate, Elaine began her career in marketing in the energy sector, as it became highly competitive. From gas to grapes - she joined Direct Wines – the world's largest mail order wine company. Elaine relished improving the whole customer experience, as well as the way the company communicated internally. Elaine was part of the companies' first foray into outbound telemarketing in the late 1990s. Elaine then became a marketing analyst and built up her international experience, before moving to Time-Life as European Telemarketing Director where she was responsible for all inbound, outbound and customer service contacts across Europe.

Elaine briefly became Global Telemarketing Director at IMP, before co-founding ReynoldsBusbyLee (RBL) in 2005 a consultancy specialising in customer engagement and customer experience. In 2006 RBL was approached by her first charity to employ her skills from the commercial sector into the charity sector and she has never looked back. Since then RBL has been engaged by over 30 charities in the last 11 years to work on DRTV fundraising campaigns, outbound telephone fundraising campaigns and Customer / Supporter Experience Audits.

Elaine has been a very active member of the DMA's contact centre council helping to set industry guidelines for handling calls with vulnerable adults. Elaine has also co-authored training materials for staff handling contacts from customers / supporters in vulnerable circumstances and is now delivering that training both directly to clients and through the DMA in train-the-trainer workshops. Elaine is a DMA adviser, co-chair of the DMA's Vulnerable Taskforce, a TPS board member, and a member of the Institute of Fundraising and was appointed as a trustee for Sightsavers in 2016. Previously Elaine was a member of the FRSB's Advisory Forum.

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Adrian Salmon, Vice President, GG+A Europe, joined the firm in April 2015. He brings nearly 20 years of direct marketing fundraising experience in the higher education, arts and culture, and wider not-for-profit spheres.

His particular expertise includes direct mail fundraising, regular giving program management, and management of contributions from integrated mail and online appeals. Most recently, Adrian was Footsteps Fund Manager at the University of Leeds, where he dramatically increased the University's number of donors, annual giving income, and contributions from integrated mail and online appeals. Adrian also implemented an automated propensity scoring system, the first to be used by a university in the United Kingdom, and designed and implemented the University's first dedicated 20-seat fundraising call centre.

Prior to joining the University of Leeds, Adrian served for more than nine years with The Phone Room Ltd. as Head of Client Services and as Head of TPR Education. He ran numerous award-winning telephone campaigns for non-profit clients, including the National Galleries of Scotland, Symphony Hall Birmingham, and the South Bank Centre. He also established successful telephone fundraising campaigns for Salford University and Birkbeck College, University of London. Adrian holds a Bachelor of Arts degree in English from the University of Cambridge and is a member of the Institute of Fundraising. Adrian serves on the Advisory Panel of Rogare, the new practitioner-focused fundraising think tank at Plymouth University's Centre for Sustainable Philanthropy.

THE COMMISSION ON THE DONOR EXPERIENCE

Case studies: Save the Children

Following the events of summer 2015, Save the Children paused all outbound telephone fundraising activity for a little under a year. During the course of 2016, Save the Children underwent a thorough review of their telephone fundraising and in mid-2016, the team tested and then successfully rolled out a complete re-shaping of their telephone fundraising program. Rather than test one campaign, this was a blanket change for the program and all campaigns are now managed in line with this new approach.

The goal was to create a very supporter centric experience, driving increased loyalty and engagement, while minimising any potential shortfall in funds generated. Save the Children did this through a combination of the following factors: single agency selection and close relationship management, supporter centric planning, scripting and ask structures, preference captures, vastly increased training and engagement for fundraisers, significant levels of fundraiser monitoring and the implementation of a supporter feedback mechanism.

Agency Selection

Save the Children opted to implement a partnership approach with a single agency. They felt that, rather than having a number of small campaigns with various suppliers, they had the best chance of success and accountability by partnering with one single agency. This provided the best opportunity to provide (a) increased levels of oversight and tighter management; (b) more in depth and tailored fundraiser training and engagement (making fundraisers an extension of the Save the Children team and bringing them closer to our work); (c) reduced campaign costs and efficiencies in campaign management.

Supporter Centricity

Supporter centricity was at the heart of every decision which influenced the design of the new approach. Firstly, the maximum number of call attempts per supporter was drastically reduced to six, with a supporter unable to receive more than one call per day or be included in more than two campaigns per year.

Secondly, scripting was re-designed. Traditionally fundraisers were provided with scripts that had a singular pre-determined theme. Scripts were changed into conversation guidelines which were supporter / fundraiser led. Save the Children provided guidelines around 11 different creative themes and fundraisers were encouraged to find out what supporters could be interested in, to discuss on that call. If a supporter had no preference, fundraisers were encouraged to deliver a topic they were passionate about – resulting in conversational and impassioned calls.

Thirdly, fundraisers were barred from making three direct debit asks in a phone call. They were able to make three financial asks (for different products) but in practice this very rarely occurred. Fundraisers were empowered to offer multiple different products: DD, cash, RG via mobile and three non-financial outcomes. We encouraged them to base their ask structures on the conversations they were having with a supporter. Thus, the ask structure was as flexible as the script.

Preference Captures

Throughout the call, questions were asked of supporters about their interest in Save the Children (in order to tailor the script), however we also developed the ability to import this information from the agency in order to tailor future communications with individual supporters based upon their interests.

Training and Engagement

In order for fundraisers to follow this very flexible approach in terms of scripting and ask structures, training was hugely increased. Fundraisers underwent six hours of training on various topics ranging from our work with children to identifying potentially vulnerable adults, before they were allowed to make their first phone calls.

After this, they joined a program of regular training by members of staff from across Save the Children (supporter care, campaigns, humanitarian communications, humanitarian leadership, child safeguarding etc.). Each individual fundraiser has received over 25 hours of training from Save the Children staff, resulting in an incredibly well versed fundraising team that can talk confidently about a variety of issues.

Engagement of fundraisers does not end with training however. Save the Children uses an online portal to stay in contact with fundraisers on a day to day basis. This provides fundraisers with the opportunities to ask questions when they need clarification; it also allows staff to update fundraisers with relevant information in real time. Finally, it acts as a knowledge bank which fundraisers can use to gain additional information about specific elements of our work (e.g. Child Friendly Spaces) – they can use this approved material in phone calls if they feel it is relevant.

Monitoring

To ensure that quality standards are met, Save the Children listens to and scores a significantly increased volume of calls. The calls are randomly selected by Save the Children and on average internal staff listen to and score approximately 4.5% of all calls made on a week to week basis. Feedback on calls is provided to the agency about fundraiser call quality via a weekly scorecard which is then passed back to the fundraisers via agency trainers.

Supporter Feedback

Save the Children added a method by which supporters can provide feedback on their calls in the form of an SMS survey – highlighting that they are "very satisfied" with their experience.

Learnings

- Save the Children established that despite a significantly 'softer' and warmer fundraising approach, financial results remained largely unaffected – with certain campaigns actually achieving stronger financial results than before the test.
- Changes required involvement from teams across the organisation (which also lay outside of Individual Giving); a key learning was that when all teams buy into en masse changes, big successes are possible.
- Sometimes it is worth looking at macro scale changes to your approach rather than testing micro scale changes to see their impact in isolation. The impact of one specific change in Save the Children's approach cannot be measured – it's the overarching changes to everything that made the difference.
- Complaints were drastically reduced. Over the 28,000 contacts made in 2016, Save the Children received 3 complaints about telephone fundraising. None of which were caused by fundraiser malpractice.

Challenges

- Changing backend processes can cause resistance from teams internally. Senior leadership buy-in is necessary in order for such changes to be pushed through.
- Creating new habits, particularly around monitoring and engaging fundraisers can be difficult – giving people as much of a heads up as possible and not rushing anything will give you the best chance to succeed with an entirely new approach. Often culture change is required.

Case studies: Erskine Stewart's Melville Schools, Edinburgh

The problem we wanted to solve, and idea we wanted to test

We wanted to have more regular to and fro contact with some of our community, not just us sending information out but actively seeking feedback from the community. For us, community consists of alumni, parents & extended family and other friends of the school. These were affinity calls, not fundraising and the charitable aspect of our work and funds were not mentioned other than in an administrative fashion.

How we implemented it

Rather than have a dedicated campaign, we decided to integrate this into our daily work, initially for a term but it's been extended for another six months. We started by contacting those who contacted our office for various reasons, booking into events, enquiring about programmes etc.

For each email or letter received, we called to have a chat to learn more about what had attracted them to the event or programme and what else they may be interested in. Sometimes we were seeking permission to add contact details to the database, e.g. email addresses or name changes. Sometimes we congratulated people on life milestones such as having a baby or getting married or changing jobs. Often these conversations led on naturally to other areas of the school and how the parents or alumni could see or had experienced issues.

This has enabled us to improve all sorts of things around the school from their feedback including launching a dedicated section of the parent portal to display sports team results and a new news feed on the main school website for alumni. It's also given us greater understanding of what is valued about our programmes so that we can focus more on these aspects and drop those which are seemingly effective but from which our constituents derive little value.

What happened, and how we measured it

We measured how many of each constituent group were contacted and which topics were covered using a straightforward tick box system on the database. We kept more detailed notes of many conversations in another section but it was not possible to query on such levels of detail, hence the tick box system. We also assigned a 'score' to each conversation to try to reflect how engaged the contact had been and how warm. This was on a scale of 1 to 10 with higher scores meaning warmer and friendlier. This was not done scientifically by listening for particular words but was done on how positive the person had sounded and how constructive their suggestions for improvement were and how likely we felt they would react positively to future calls along the same lines.

Any obstacles that got in the way and how we addressed them

It would have been lovely to include an 'ask' on calls where it was appropriate but our governing council do not allow fundraising by telephone so this was not possible. It will be interesting to see when our mailed appeal goes out in April if those contacted do give and if they give more or more frequently. We did notice an increase in ad-hoc donations over this period but there has not yet been time to go back and analyse this data compared to those contacted.

Time is another factor as we didn't increase staffing in any way for this project and the calls had to be squeezed in around other jobs. It's surprising how much you can get done whilst on the phone though! We often have a lot of event preparations to do so it's easy to fold tombola tickets whilst on the phone.

What implications we think this has for our future engagement with donors and supporters over the phone

It is certainly something that I will continue to do and develop over the years as it's been fantastic for us in so many ways, from identifying prospects for major gifts to developing deeper relationships with key members of our community. It's become part of our daily work and we quite look forward to our chats with parents and alumni.

Case study: The Bible Society

Bible Society Calling Philosophy

We started calling donors in 2010. We decided initially on a few principles that we have kept to ever since:

- We would not pay by results, but would pay a small amount per call, regardless of result. We hoped that this would prevent the callers feeling pressured to get results.
- We would not rigidly insist on drop asks, these should only be where appropriate.
- Happy donors were a priority, so every call would aim to leave the donors feel thanked.

Learnings from the last five years

We have discovered that positive responses on the telephone are consistently ten times as high as by post. This is true for people increasing their monthly gift, as well as for cash donors converting to regular giving. So telephone calling is very cost effective.

It also allows us to have a much more personal contact with our supporters, and we are often able to answer queries or special requests when calling.

We have a very low level of complaints – around twenty complaints for every 10,000 calls. Where we can, we contact those complaining, and the situation has almost always been amicably resolved when we are able to explain why we do calling.

The low level of complaints is partly because we only call where we have permission, and in recent campaigns we have endeavoured to be even clearer that people will be called.

We conducted a supporter survey in 2013, and discovered that people who were called were more likely to describe themselves as very satisfied, than those who had not been called.

The figures are below - From Bible Society Supporter Survey 2013

CALLED	Very satisfied	Satisfied	Neither	Dissatisfied	Very dissatisfied	TOTALS
One call or more	31%	53%	12%	3%	0	629
Never	23%	60%	16%	1%	0%	1246

Calling may upset a tiny minority, but in general, it greatly increases satisfaction levels.

Called people were 35% more likely to tick very satisfied than those not-called and called people were 25% less likely to tick neither than non-called.

Note that although people reported being called several times, we almost never call supporters more than once, unless they are regular givers, and even then only every two years or so. Donors sometimes report several call attempts (that usually go through to answering machine) as being called several times, although we don't count a call as a call unless we've had a proper conversation with someone. In line with industry standards we attempt calls a maximum of ten times.

Welcome calling

We trialled welcome calling in late 2016, but this was problematic due to the heavy restrictions on what constituted a marketing call, so it meant we weren't able to check that they were happy to receive future calls, or to promote our aims and objectives. So the call was very short and an offer to provide future help if needed.

Multi-channel campaigns

The telephone has helped us to run some very successful multi-channel campaigns. We have been running these for the last three or four years. As an example, in late 2016, we produced a Scripture colouring calendar, which we advertised widely using targeted ads on Facebook. We trialled two options:

- To get their free calendar people had to give a name, address and mandatory telephone number. It was clear that they would be called, and if they didn't want a fundraising call, then they could still get a free calendar by calling in to the office for one instead. (Form Version A)
- People could order a free calendar, but the telephone number was optional, and the form asked people to give the number if they were happy to be called. (Multipage form Version B)

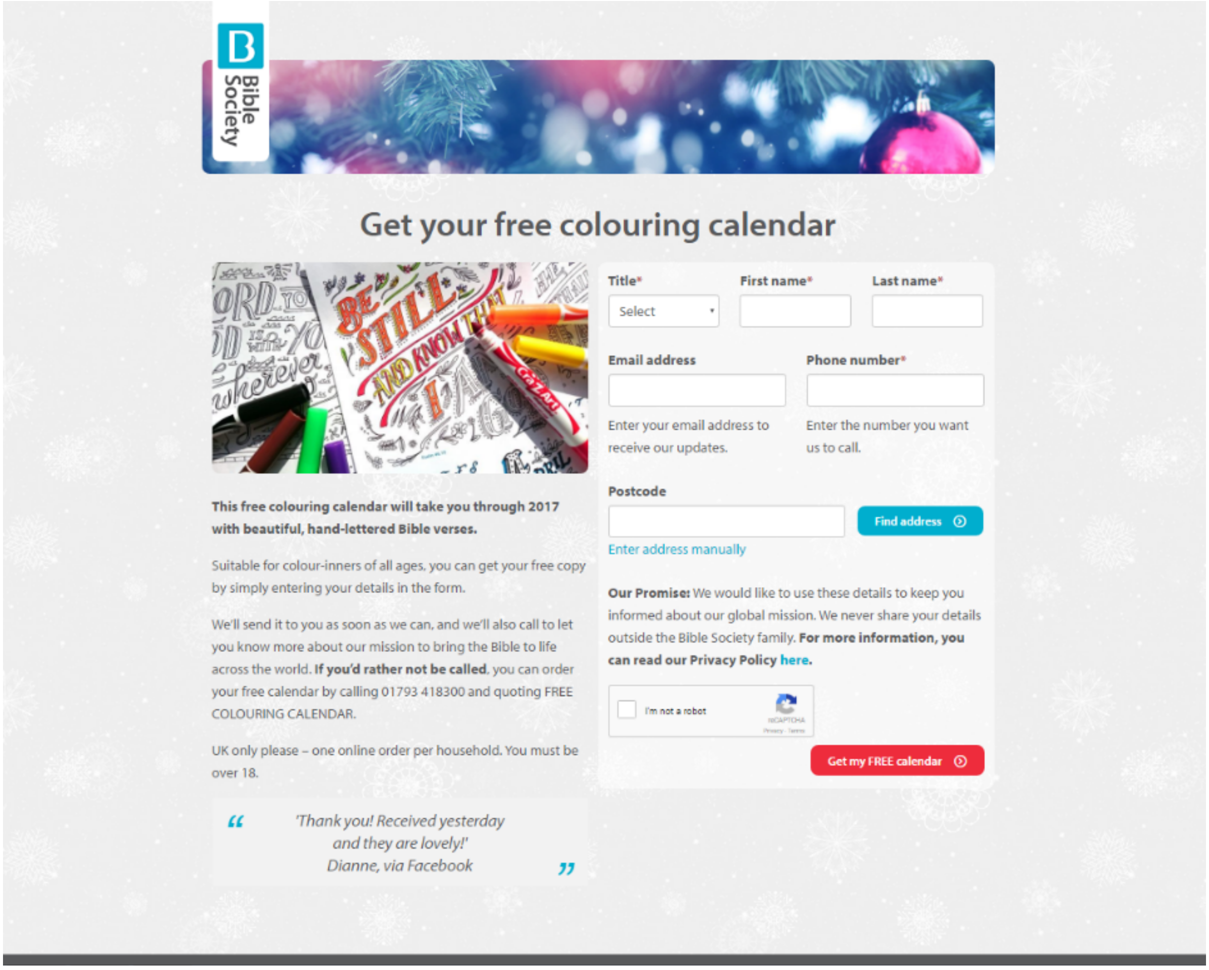
(Images of forms included at the end)

Those who had filled in the form with a mandatory telephone number responded to a direct debit request at a rate 26.5% higher than those who had given it voluntarily. However, it is a slightly mixed picture. Although the form with the telephone number as a required field did do better in terms of DD response rate, it was notably harder to get through to these people. The contact rate was 32% lower for this segment. But the overall return for the mandatory form (once cost of calls is factored in) remains better.

On the mandatory form we tried hard to make it absolutely clear that they would receive a telephone call, and even put an extra note under the box saying 'Enter the number you want us to call'.

We also did a simultaneous campaign on DRTV. People texting the keyword would get a call-back and we would then take their name and address, and tell them more about our work. Interestingly, the DRTV campaigns we have done have had a very significantly higher conversion rate than the campaigns where we call people after they have received their gift. The difficulty with this method is that the initial costs of advertising are very high, but it does show that this recruitment method has potential if we can increase the number of responses or reduce the cost of advertising.

Version A: Mandatory telephone form



Version B: Optional telephone number above and below (multipage form)