Making it easy for donors to engage across all channels

Project 11. Communication with individual donors

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"We have two ears and one mouth so that we can listen twice as much as we speak." Epictetus

Overview

Project 11 is made up of six different sub projects investigating how the donor experience can be enhanced via different channels commonly used in communicating with individual donors. These projects cover:

- Mass media
- Direct mail and other areas of direct marketing
- Telephone fundraising
- Digital fundraising
- Community fundraising
- Face to face fundraising

Direct mail, telephone and face to face were the three channels which came in for the most criticism in the summer of 2015 following the tragic death of Olive Cooke. Whilst this makes it an incredibly important channel for fundraisers, it was clear that changes in practices had to be made and have been made. The sector had to listen to donors and take remedial action. Complaints are not just noise, they are insights to be acted on.

Each project provides the reader with a set of guiding principles, from the visionary to the practical, from the strategic to the tactical. Some are quite fundamental and would need earnest consideration by charities as to how they were to approach them as it would require a change of mindset and attitude. However, there is a belief that some fundamental changes are needed not only to improve the donor experience but to regain the trust in charities which lies at the basis of voluntary giving.

Across the six reports there are some universal themes that are worth grouping and summarising. These have important consequences for individual giving fundraising and we have outlined the top 10 below, together with references to where they are mentioned in the reports. There is also significant overlap with other commission projects and these are highlighted where relevant.

This introduction to individual giving concludes with some thoughts and recommendations on integration. Just as 'no man is an island', no fundraising channel should be either. The need to avoid silos and work collectively across channels and departments is highlighted time and again in the six topics that comprise project 11.

1. Setting long term metrics and getting buy-in from trustees and non-fundraising colleagues for non-financial targets

Improving the donor experience will involve us changing the 'fast buck' and low value approach (project 11a, page 4) that has typified much of individual giving recruitment in recent years.

To do this, it is important that '[T]rustees should take responsibility for setting the charities' culture by putting donors at the heart of the organisations thinking and engaging in the donor programme' (project 11d, page 4). Furthermore, 'long term investment *and* ambassadorial support are critical' from trustees (project 11d, page 4).

The telephone project gives clear guidance on what some of these long-term metrics and non-financial targets should be:

'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… Donor satisfaction, quality of conversations, retained permission for future contact and attrition can and should also be used to measure success.' (project 11e, page 1).

According to the research undertaken for 11e, the onus is on charities to improve their performance in this area. Only 21% of respondents said they used longer-term metrics and agencies reported they offered charities the chance to listen to calls and assess satisfaction, but few take them up on this.

Links to other commission projects: Project 3: Satisfaction and commitment; Project 15: The role of trustee boards and senior management and; Project 20: Fundraising Investment

2. Research, gathering feedback and giving donors choice

Closely related to point one, the need for research to understand donor's motivations and needs and then consistently seeking feedback and offering choice was viewed as important across a number of reports.

The digital paper urged fundraisers to 'Take time to find out and understand the interests and motivations of donors' (11c, page 2) and to use surveys on your website to guide understanding of donor's needs.

Similarly, the community project advises, 'Understanding the motivations of a volunteer or funder, fundraising group is critical in ensuring connection, support and charity reputation is maintained, as well as being a good way to better get to know the supporter and to deepen the relationship and interaction on both sides' (11d, page 6).

There are some examples of how to do this in other reports. The telephone paper discusses using consent calls to find out what the supporter is interested in (11e, page 2).

The work of Amnesty International Belgium (Flanders) and DonorVoice is used in a case study to demonstrate how capturing donor feedback and identity at the point of sign up has increased face-to-face fundraising retention from 60% to 80% by the end of month 3 (11f, page 22).

One recommendation would be for further guidance to be produced on how to conduct research and gather feedback for charities with limited budgets.

Links to other commission projects: Project 3: Satisfaction and commitment; and Project 13: Giving choices and managing preferences

3. Use of data and customer relationship management (CRM) system

Accurate and relevant data recorded on a functioning CRM system is crucial to improving the donor experience. It is hard to provide a great experience if we do not know who our supporters are and don't have an accurate record of past interactions, giving history and relational information.

As outlined in 11d, page 6, 'A strong database management infrastructure is critical in delivering growth in community fundraising.' Similarly, telephone fundraisers are encouraged to '**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.' (11e, page 5).

Links to other commission projects: There is no specific project on data and CRM, although it is a topic that is discussed in numerous projects.

4. Welcoming new donors and the supporter journey

Another popular theme is how fundraisers should welcome donors and then develop tailored supporter journeys. Different projects suggest different approaches on the best way to do this, although there is broad agreement on their importance.

For example, 11f encourages the use of the phone in conjunction with face to face fundraising to enhance the experience: 'By asking new supporters for a little more information, and saying thank you well, the alignment of a good telephone program with a face to face program can prove valuable to the donor and the charity. Helping to place the relationship on a firm foundation, and making sure that the ongoing supporter journey is one that the supporter wants.' (11f, page 5).

In the digital sphere it is recommended that fundraisers 'Physically map the full and various journeys for supporters through all your communication streams. This should be done for online and offline channels together.' (11c, page 3). This will ensure that you 'consider if the journey is something that you would consider to be positive, rewarding and inspiring.' (11c, page 4)

In community fundraising the welcome donors receive was thought crucial: 'On boarding and welcoming a community donor is an important stage in the relationship and many potential relationships break down at this earliest stage.'

A word of warning needs to be given around welcoming donors and the supporter journey. It is easy spend a lot of time and money on journeys that actually don't improve the experience or improve retention. Make sure that you have measurements in place to assess the improvements in loyalty, commitment and satisfaction any welcome programme or supporter journey produces.

Links to other commission projects: Project 4: Thank you and welcome; Project 5: The supporter's journey and; Project 13: Giving choices and managing preferences.

5. Customer care and the supporter promise

The idea of a 'contract' or 'promise' between fundraisers and supporters that should be clearly articulated is a strong one. The community fundraising project states:

'A donor charter or statement of principles is fundamental in orientating an organisation around good supporter governance. Respectful engagement, donor first principles, transparency over how money is spent, adherence to communication preferences, quality standards in complaint handling. All of these ensure not only that the charity embeds good practices in terms of supporter stewardship but also ensure the charity shares a common understanding and respect for those fundamental to ensuring the charities existence: supporters' (11c, page 4).

The new 'My Oxfam' app has been designed to improve customer care and the interaction between Oxfam and supporters. This is all part of their new 'engagement first' strategy (11a, page 18).

Links to other commission projects: Project 16: A distinctive service culture.

6. Emotion and storytelling

'Nobody gives ordinary donations RATIONALLY, they give EMOTIONALLY.' so states project 11b on direct mail. Many other reports highlight the importance of emotion and the use of storytelling to deliver that emotion, but none state it is as succinctly as this.

The mass media report discusses the use of negative and positive emotions and the role imagery plays in this realm of fundraising. The importance of not being exploitative is explored.

There are a number of recommendations around storytelling in the digital report. As it states: 'Improving storytelling should be a vital part of your charity's online communication strategy. It is a difficult aspect to achieve as all donors are different, although making an emotional connection is essential before someone will donate.' (11c, page 12)

However, 11b gives an important warning about storytelling that fundraisers would do well to heed. 'Anyone who truly understands the task of story-telling, knows that a story simply doesn't work unless the reader or listener is absorbed into it, emotionally.' (11b, page 1)

Links to other commission projects: Project 1: Use and misuse of language and Project 6: The use and misuse of emotion.

7. Involvement devices and products

The old Chinese proverb is relevant here: *Tell me* and I will forget; *show me* and I may remember; *involve me* and I will understand. This is particularly important for face to face fundraising and direct mail and both reports give examples of how you can use props and connection devices to create a better experience for supporters:

'Some of them are physical, like the flag in the Royal British Legion mailing that will be taken across the Channel and planted on Sword Beach with the donor's good wishes, seventy years after the D-Day landings. Or the piece of string, just like the string that connects a child of four undergoing radio-therapy, when his mother has to be the other side of a lead door. A tug from each encourages both and the child remains still throughout the treatment.' (11b, page 4).

'UNICEF used a doll that all members of the public that stopped would be asked to hold. The doll weighed the same as an average baby born in the western world. As the fundraiser spoke to the potential supporter about the dangers of malnutrition in the countries where they work, they were asked to hold another doll, weighing far less, representing the weight of a child born in such conditions. The ability to simply compare-and-contrast the unfairness of the situation, through the doll, helped to demonstrate the importance of supporting their beneficiaries.' (11f, page 16)

Additionally, we should be make compelling offers and products to our supporters. Think child sponsorship, make a blind man see, stop child cruelty etc. The mass media report discusses WWF's animal sponsorship product, which has raised millions globally:

'This is a strong advert with good eye contact from the beneficiary into the camera, and therefore to the viewer. The need and urgency are clearly explained in the advert in the footage of animal skins. The voice over is strong and clear and it grabs your attention. The benefits of membership are clearly shown and described. The price point is attainable at £3 a month. The product is something which provides some fun and education for a child.' (11a, page 9).

Links to other commission projects: Project 2: Fundraising and vulnerability; Project 4: Thank you and welcome and; Project 12: Inspirational creativity.

8. Design, usability, copywriting and readability

For individual giving that relies on the written word (direct mail, online) then the quality of the writing is important.

11b has a checklist for both copywriting and designing appeal letters. There is no point writing a great appeal if the design then makes it hard to read or incomprehensible!

Many of the same rules also apply to online communications and 11c has another checklist of writing and designing websites and online communications.

Additionally, making it simple to donate is crucial. Too often potential supporters give up before completing their donation. This can often be relatively easy tom improve, as the following example shows: 'One example comes from the JRDF. They increased online donations by 18%, by eliminating distractions from its landing page to make the donation path clearer, reducing the number of steps needed to complete the donation process, rephrasing its confirmation email in more friendly language and making its website mobile-friendly.' (11c, page 11).

Links to other commission projects: Project 1: The use and misuse of language.

9. Transparency, compliance and respect for supporters and beneficiaries

Given the nature of the commission then this is almost a given. However, many the reports suggest that fundraisers go beyond the law and fundraising regulations to deliver a great experience.

In the digital fundraising report there is a whole section on how to comply with online marketing regulations (11c, page 14). Whilst the community fundraising recommendations urge transparency: '*Be transparent about how the donor's money is being spent and/or the rationale for decision making.'* (11d, page 4)

For telephone fundraising it is important to: 'Be respectful - conducted with consent from donors, and conducted at times that are welcomed by the donors.' (11e, page 2).

Furthermore, it is important to '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.' (11e, page 4).

Finally, the mass media report (11a) also urges fundraisers to respect beneficiaries in their portrayals in appeals. Fundraisers need to show reality, but avoid exploitation.

Links to other commission projects: Project 2: Fundraising and vulnerability.

10. Integration across channels

The final theme is on the importance of integration. Further thoughts follow, but it is worth highlighting the UNICEF case study in the face to face report: 'UNICEF gave a great insight in to how they had managed to collaborate on their Safe and Warm appeal, and build a single concept. This proved to see a considerable uplift in acquisition of new supporters across all their channels. By taking a 'total marketing' approach to their public facing communications and fundraising, they saw members of the public walking up to their teams in private sites asking to be signed up.' (11f, page 15)

Telephone fundraising is also reliant on integrating with other fundraising channels: '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. (11e, page 1).

Fundraisers also need to work closely and integrate with other departments across their organisation.

Links to other commission projects*: No links*

Part 2: Guidance on integration

The following thoughts on integration are an edited extract from *Donors for Life: a practitioner's guide to relationship fundraising* by Craig Linton and Paul Stein. This will be published in the summer of 2017. Further details can be found here: http://www.whitelionpress.com/DonorsforLife.html

Introduction

The rise of digital and social media and the fragmentation of traditional media mean it is increasingly difficult to reach potential donors and make them interested in what you have to say.

Integrated fundraising is meant to be the fundraisers weapon to combat the abundance of ways we can now communicate with, and listen to, our supporters. Yet although integration sounds appealing it remains elusive to many fundraising teams.

When trying to understand why many nonprofits have failed to embrace integration, we believe it is worth splitting integration into two parts:

Everyday integration – how you give donors a consistent experience across your organisation.

Internal integration – how you organise across different teams.

The first is externally focused. How do you make sure that supporters get a consistent experience when they interact with your non-profit? This means your message and branding is seamless across traditional, digital and social media.

The second is internally focused. How do you organise and plan within your team and wider organisation to produce inspiring fundraising appeals and campaigns that work across multiple channels?

Both types of integration apply to recruiting new donors and keeping their support.

Understanding both is crucial if you want to reap the rewards that integration can bring to your fundraising.

And what are those rewards?

Increased commitment and loyalty which lead to increased lifetime value. Integrated fundraising helps you improve both of these by providing a consistent experience and an opportunity for donors to interact with your organisation.

Barriers to everyday integration – achieving internal integration to overcome them

So if the results of everyday integration are so impressive, why do so many charities struggle with it?

Perhaps the biggest problem is a silo mentality that exists in many charities. In our experience, the larger the organisation the more likely you are to have this problem.

As Jeff Brooks explains in his blog article, *Your silos are going to kill you*:

Non-profit organizations are still extremely siloed organizations. The people doing direct mail want credit for this behavior– since their efforts are triggering online gifts. But generally speaking, the digital department does not report to development but to marketing. So the digital departments get to make statements like 'online revenue is up 50 percent,' when they should be saying, 'online revenue cannibalized direct mail revenue by 20 percent.

Silos can exist in many shapes and forms. Here are some that we've experienced

in our careers:

- Fundraising department silos happen when different fundraising teams don't share their ideas and plans: the phrase 'the left hand doesn't know what the right hand is doing' springs to mind.
- Donor silos, when people argue over who 'owns' a donor. A typical phrase you might hear is 'this is a digital donor, he gave online first, of course you can't mail him.'
- Financial silos are related to the first two. Teams can argue over who gets the budgetary credit for a particular donation. If this exists in your charity then be very careful, it can be highly destructive and hugely de-motivating for staff.
- Departmental silos go beyond the fundraising team and occur when services, marketing, HR, finance, etc all operate in their own little worlds.
- Cultural or external silos, when people in a team refuse to look at outside benchmarks and best practice. We've been in this position many times. You suggest a new idea or point out another fundraising team's success and colleagues answer along the following lines: 'Sure, that sounds great. But it wouldn't work here. Our donors are different.'

These negative silos can seriously hamper your fundraising ability. Most importantly, silos don't exist in donors' minds. They don't care how w e are organised. They only care about the impact we have made and the donor experience they receive. Steve MacLaughlin from Blackbaud Inc., describes the situation:

> *Donors are multichannel. They receive messages across multiple channels and they give across multiple channels. They don't care about your organisation chart or who gets credit for the donation.*
>
> *The problem is that many nonprofits are still organised around single channels each doing their own thing, with their own strategies, their own data, their own donors and their own systems. That's broken and really costly.*

One final point to remember: silos aren't always necessarily bad. We need centres of expertise that focus on specific aspects of fundraising. We can't be jacks of all trades, masters of none, the challenge is to keep the benefits that expert teams can bring and mitigate the problems they can cause.

So how do you stop negative silos forming in your organisation? Let's look at some overarching things to consider.

First of all, senior management need to show leadership and create a team culture and environment where negative silos can't thrive. If you manage a department then make sure your team see you making the effort to engage and work with other teams. Building trust and credibility is crucial. You need to build a reputation as someone who gets things done, is accountable and shares praise and recognition across teams and departments.

Secondly, consider how the layout and set up of your office impacts on the creation of negative silos. Apple founder Steve Jobs was adamant about the importance of office design to help break down silos. He thought it was crucial to encourage encounters between staff from different parts of the business. The design of the Pixar headquarters is testament to this:

If a building doesn't encourage [collaboration], you'll lose a lot of innovation and the magic that's sparked by serendipity. So we designed the building to make people get out of their offices and mingle in the central atrium with people they might not otherwise see.8

Finally, don't forget your 'why'. When you are struggling to overcome the problems silos can cause take a step back and remember why you are fundraising in the first place.

Remind people of the duty they have to the cause they serve and to the donors they represent. Ask people questions like 'how does this help us reach more beneficiaries?' or 'what would our donors say if they could hear us talking like this?'

By reframing your issues in the language of beneficiaries and donors you can get people to see you are all on the same side and not competing against each other.

Ideas to combat negative silos

Now let's look at some specific ideas to combat negative silos.

Fundraising department silos

It is crucial that different teams are informed about each other's work. This can be through formal and informal routes. You might have a weekly or monthly inter-department team meeting, e-mail updates, use project management tools, such as Basecamp, or hold informal stand-up meetings.

Too often our default mode of communication is e-mail. Even when we are sharing the same office, the temptation can be to send an e-mail rather than talk to the person we want to communicate with. Think about how you can encourage people to send fewer e-mails and to pick up the phone or, even better, get up and go and speak to colleagues.

Richard Taylor, former director of fundraising and marketing at Cancer Research UK, takes a radical approach to the problem of fundraising silos. At the 2014 Revolutionise Annual Lectures he told the audience how he moves his senior management team around every couple of years. He believes that getting someone to switch departments brings numerous benefits to overall fundraising and marketing performance. It reduces negative silos as it helps identify cross-team opportunities and keeps senior management engaged and highly motivated.

One development from the world of technology is to bring cross-departmental teams together to work intensely on product development or software updates. These are known as 'scrums' and 'sprints'. This flips the traditional sequential approach on its head and brings teams closer together to work on a problem. Organisations from outside the world of technology world are starting to use this technique to solve their own business problems and develop products.

Try giving permission and autonomy to your staff to work together on a problem or project they are interested in. This can be a great motivator and produce high-quality work and solutions, even in a short, intense period of time.

Donor silos

We have heard horror stories from some fundraisers where they won't ask a donor for more money as they will 'lose them' to another team. This is clearly a major issue. So what's the answer?

For too long we have organised and structured fundraising teams in a way that is convenient for us and not around what suits the donor. However, there are signs of this changing.

Donor-focused nonprofits have created entire departments with trained professionals focused on donor care and the donor experience. Examples include the Humane Society of the United States, Operation Smile, Child Fund International, American Cancer Society and St Jude. Some even have, by whatever title, created the position of 'chief donor officer', to coordinate fully their activities across all departments and truly put the supporter at the heart of all their activities. This role includes establishing and monitoring metrics for defining customer relationships, cross-departmental influence to deliver the greatest value to supporters and driving an integrated agenda throughout the organisation. They actively seek to destroy negative silos.

Financial silos

Targets are important in fundraising, but they need to be used wisely. You don't want to make them counterproductive by pitting team against team. If multiple teams are involved in a successful event, major donor ask, corporate pitch, etc, then share the (budgetary) credit. Don't create a 'winner takes all' mentality that rewards selfish behaviour and only one team receives the credit for a fundraising success.

Departmental silos

These are problematic when trying to get stories and information for your fundraising.

In one of the organisations he worked for Craig was told there was a huge problem with silos between teams. This created a culture where there was little trust and respect for each other. It quickly became apparent that it was seriously harming the organisation's fundraising ability. Working with his team, Craig set out to bring down the barriers. Through little steps such as purposely eating in the same dining room, organising job swaps and inviting other teams to fundraising social events the problem soon started to recede. Trust was built, stories shared and they were able to enjoy their mutual successes.

One of the simplest ideas was sending a thank-you card to staff he worked with on a project when it was finished. This small token of gratitude worked wonders. One colleague told him, 'I've worked here for nearly 10 years and it is the first time anyone has done anything like this. We need to do more of this kind of thing.'

Gradually people wanted to work with the fundraising team and began to understand why we needed certain information. Rather than Craig's team constantly chasing for stories and images they could use in their fundraising, colleagues started approaching them – it was a huge transformation.

Fundraisers need to understand the motivation of other teams in the charity. When trying to motivate people to help fundraising, it is important to show 'what's in it for me?' One final idea to break down departmental silos is to organise fundraising weeks for your own cause. Get all staff, volunteers and trustees involved in fundraising. This can range from teams helping at community events such as flag days to taking part in fundraising challenge events. At one organisation Craig worked at nearly 90 per cent of staff took part in the fundraising challenge he set his colleagues. Overall, they raised approximately £200 for every staff member in the charity. As well as producing a great fundraising result, it had a huge positive impact on internal morale and building stronger inter-departmental links.

Cultural/external silos

These can be the hardest to deal with as, frankly, encountering this sort of mindset can be extremely de-motivating. People who defend the status quo, are reluctant to change and believe the old ways are best can be described as 'drains'. They are people whose negativity and pessimism drain away any positive energy and strangle new ideas.

To combat this you need to try and become a 'radiator' and exude energy and warmth to your colleagues. Be the person who is known for your generosity of support to others.

One way to tackle cultural silos is to hold a 'sacred cow barbeque'. This is a technique described by nonprofit consultants Bernard Ross and Clare Segal in *Breakthrough Thinking for Nonprofit Organizations.*9

The idea here is to think the unthinkable and challenge mindsets. It is a straightforward technique. Write down things you wouldn't or couldn't do as an organisation; stick the ideas on a wall or flipchart to be discussed and debated. The sacred cows could be things such as 'we should cancel our longstanding event', or 'we need to invest more in retention than acquisition'. Use the opportunity to think beyond the norm. To help challenge mindsets, Ross and Segal propose four rules:

1. Anyone can say anything.
2. No one is to make personal attacks and no challenges will be taken personally.
3. No challenging remarks will be repeated outside the meeting.
4. Only things the group has agreed to take forward will be recorded. Everything else will be forgotten.

Other barriers to internal integration

So now we've looked at negative silos, what are the other barriers to internal integration?

Quality of data and investment

Once again one of the big barriers we face as fundraisers is the quality of our data and investment in our systems and processes.

Convio's *Integrated Multi-Channel Marketing* study looked at barriers to integration. As well as the silo problem, the study identified a lack of commitment on the part of an organisation's leaders to integrate. Consequently, there is low investment in the mechanics – business processes, staff, measurement and software – that are required to make it happen. Fewer than half the organisations surveyed measure lifetime value by channel, or tracked the migration of donors from one channel to another.

Too often organisations only track metrics associated with a single channel. For example, we look at how many donors mailed in a cheque in response to a direct mail appeal, but not necessarily whether we experienced an increase in online donations when the letter arrived at the donor's home.

Greater focus is needed on how people move from one channel to another, as well as more detailed examination of retention rates by channels of engagement. Finally, achieving everyday integration is hard work. Battling negative silos and not having the necessary processes and data to hand can make integration seem more hassle than it's worth. We'd urge you to stick with it though. As we showed at the beginning of the chapter, the rewards for getting it right can be excellent. And as the way we consume media continues to change, there is no doubt that integration will be essential to fundraising success.

Tools and tips

Here are some tools and tips that can help you improve your everyday integration.

Mystery shopping

Perhaps the easiest way to assess your efforts at integration is to conduct a mystery shopping exercise. Ask friends or family to make a donation through a range of channels – mail, over the phone, online, via a mobile device – and see what happens.

We would bet that there is likely to be significant differences in the giving experiences by channel. Here are just some of the things you might want to compare:

- Ease of donating: was the online donation page easy to find, was the telephonist polite?
- Timeliness of thank you: how long does it take for the donor to get a thank you?
- Quality of thank you: do online donors get an offline thank you?
- Feedback on gift: how do you show people the difference their gift has made?
- What happens next: do people get put in the fundraising machine or get a bespoke welcome?
- Satisfaction of experience: do you measure how people feel about donating?
- Data capture: are you capturing the same data in all channels?

Once the mystery shopping exercise is over you can tabulate results and look at problem areas: some may have simple fixes, others may require more work. You can consider the problems by ease of solving, cost to solve and impact of solution. From this you can develop an action plan to improve the donor experience and make it consistent.

Checklists

Checklists prevent professional fundraisers from making stupid mistakes. From the point of view of integration, a checklist makes sure you don't miss anything that will spoil the donor's experience with your cause.

Marketing guru Denny Hatch provides a 69-point direct marketing checklist in his book *Career Changing Takeaways!* As Denny says, '... checklists in this complex, high-tech world are indispensable'.13

Here are some sample questions you might want to think about when you are planning an integrated appeal:

- Has the receptionist been briefed and knows where to pass calls to?
- Is the appeal on the front page of the website?
- Has a bespoke landing page been made for donors to give through?
- Have you arranged for the landing date of your mailing, pre-appeal e-mail
- and telephone calls to flow in a logical sequence?

- Have you prepared appeal content for social media?
- Have you produced ‘thank yous’ by channel?
- Do you have a plan for donor feedback after the appeal?

These may all sound obvious, but it is amazing how often mistakes are made. We have heard of a DRTV advert being launched, but no one had told the call centre so it had closed, meaning no one could respond. Maybe a new online appeal has been launched, but someone has forgotten to change the default e-mail message for donating. Easily done, but checklists can stop these sort of mistakes from happening.

Tailoring content

Just as you speak differently to your parents, colleagues, wife, friends and children (at least we hope you do), you need to tailor your content to the channel it is being promoted on. In *Jab, Jab, Jab, Right Hook,* entrepreneur and social media guru Gary Vaynerchuk describes the importance of doing this:

Today, getting people to hear your story on social media, and then act on it, requires using a platform’s native language, paying attention to context, understanding the nuances and subtle differences that make each platform unique, and adapting your content to match.

The author loves ice cream. Here is how he could use different media to let people know:

- Twitter: I love #icecream.
- Facebook: I had an ice cream.
- Instagram: look at my ice cream.
- Four Square: this is where I ate my ice cream.
- YouTube: watch me eat my ice cream.
- Direct mail: here’s a postcard of where I ate an ice cream

Although the differences are subtle they are important. You are missing out if you put a copy of your direct mail letter on your website and then link to it on your Twitter and Facebook page. Think about how your supporters interact with each medium and tailor your content appropriately. What will make someone ‘share’ or ‘like’ a post on Facebook (normally the image is important) or ‘retweet’ it on Twitter? It is going to be different to what inspires someone to write a cheque after reading a four-page letter.

The temptation with the opportunities that digital and social media offer is for us to try to reinvent the wheel. Often less is more: concentrate on getting the basics right. Digital and online fundraising expert Bryan Miller had this to say on his blog:

Fundraising is all about inspiring people to help change the world for the better by funding your organisation’s work. Online fundraising simply adds digital to the donor engagement mix. So, don’t start by thinking about doing new things online. First look at the fundraising that is working for you already and consider how online activity might make it work even better…

Focus first on the basics that will help you deliver more income before investing in innovation…ensuring your donation pages are really effective is likely to deliver you far more income than trialling innovative new ways to fundraise online or tinkering with your Twitter feed. The clarity that you’ll gain from such focus will also mean you’re far better prepared to brief your organisation's digital folks (who are often in a different silo) on the key things you need them to do to help you raise more money.

Appeals and campaigns

This last part is about bringing teams together to plan and execute major fundraising appeals and campaigns. The barriers are similar to everyday integration, but the stakes are higher.

If you are able to pull off large-scale integrated appeals then they can deliver transformational sums of money for your organisation.

Paul de Gregorio, from UK fundraising agency Open, has this to say about integration and fundraising campaigns:

- I think integration for campaigns means...
- Having a clear and single-minded proposition; one that can be articulated in many ways in many places to many people.
- Integration is not: a logo, a visual identity, a strap line.
- If you are integrating well you're communicating the same thing across multiple channels to multiple audiences in a variety of executions. And everyone gets it.
- If you're integrating well all your colleagues and all your agencies get it and are producing work that effortlessly feels part of your campaign. Most importantly it doesn't need to be explained.

We agree with Paul. Yet not many charities are able to pull it off in practice.

This appeal and campaign integration is crucial for charities that have one main fundraising event. Think Movember (worldwide), Stand up to Cancer (USA and UK), Comic Relief (USA and UK) and telethons in individual countries around the world (the largest of which, in terms of funds raised per capita, is the Norwegian National Telethon).

These campaigns all focus brilliantly on a single fundraising message and then integrate it over as many channels as possible (they also happen to be fun to take part in).

Conclusion: integration is more important than ever

There is no lack of guidance available on integration but the sector still has a long way to go to get this right. Many organisations still work in silos and are not being bold enough in their attempts to integrate their resources and engagement activities effectively. Whilst the challenges are great, in terms of the practical considerations and the investment required, the opportunities are clear.

Those charities that are able to achieve everyday integration and develop transformative integrated appeals and campaigns will be on the road to fundraising success.

Fundraisers needs to be brave and to do everything in their power to make integrated fundraising and campaigns the norm in their organisation.

Case study:

Taken from Fundraising Magazine – April 2017

Joe Jenkins, director of supporter impact and income at The Children's Society explains their new integrate strategy to engage with new cohorts of supporters:

Our brief was to look more broadly at how the whole organisation worked with supporter engagement. Very early on we placed volunteering in the same directorate as fundraising and communications and we went on to develop a new strategic approach. So now we have a supporter engagement plan which looks at how the whole organisation delivers the supporter experience, whether through fundraising, volunteering or campaigning.

The whole strategy has been built around a focus on our supporters' experiences, as opposed to organising ourselves around fundraising techniques, channels or functions.

We are still at the early stages of this transformation in our approach, but rather than looking at whatever product our supporters are engaged with, we are looking a what their journey looks like over time and how we can develop offers and activities to better engage them to add value. That has required our teams to work in an entirely different way; to plan very differently and employ whole new processes based around our supporters rather than our products.

We look at our supporters' different interests and motivations and the ways in which people want to engage with us and define their relationship with us. That enables us to tailor our communications and engagement.

Integration was not necessarily a reaction to the current environment, rather the environment was the catalyst. It was part of recognising the changing demographics of donors.

Millennials and baby boomers are becoming the major cohorts of supporters and their expectations of charities are very different. They want better experiences. Our benchmarks should no longer be other charities, but rather eBay and Amazon. People expect frictionless, seamless and joined-up experience, and that requires charities to think in an entirely different way about how they engage.

Part 3: A data-driven strategy for direct communications: Doing the simple stuff properly, Phil White – Wood for Trees

Introduction

For any Direct Marketing, data is the way to drive and underpin all marketing communications, including Direct Mail.

By getting the data basics right, it will mean a charity can communicate with its supporters in a way they feel respected and it engenders a positive supporter experience. Data insights drive a positive supporter experience by ensuring delivery of the right message, through the right channel, at the right time. By achieving this, a charity has a stronger relationship with supporters which in turn helps end-beneficiaries.

To achieve this approach, there are some obvious and straightforward steps to take. However, while obvious and straightforward, can you look in the mirror to say you've done them all and to the necessary depth possible? Is there an investment of time and resource for continuous development? Have we achieved the best donor experience possible?

Obstacles to overcome

For a truly data-driven strategy, measurement is key.

As simple as this sounds, there are often many obstacles to undermine the ability to measure campaign success. For instance:

- Raw data is not clean e.g. duplicate / uncategorised records which skew results
- Appropriate supporter consent isn't clear or in place
- Unable to access necessary data to accurately measure, because it's in silos
- Not collecting all the right data from channels and ensuring comparability
- Data analysis for insights or analysis doesn't focus on the right objectives
- No, or unclear, campaign objectives
- Appropriate suppressions are not in place e.g. MPS, TPS (and soon FPS)

It's all about the 'How'

All the rhetoric above is widely recognised and understood by data and communications experts. However, all this theory needs to be boiled down into straightforward steps around on **"How to develop a data-driven strategy that will deliver?"**

The four **"How to"** steps below are relatively straightforward BUT with people, processes, existing legacy systems, budgets .... it can slow or stop progress. With the sector under a spotlight it's essential we overcome these hurdles to improve the overall donor experience.

Step 1: How to get the data basics right

Step 2: How to ensure one view of the supporter

Step 3: How to understand data insights to inform strategy

Step 4: How to provide clear campaign objectives

Step 1: How to get the basics right

Don't switch-off… this is boringly important! A data-driven DM strategy can't be achieved if the basics are not tackled.

A small bit on regulations

There are many in-depth articles, texts, reports on this, so for brevity:

- Data Governance; ensure your Privacy Policy is up to date, data is held securely and appropriate processes and policies are in place. NB. Potential for larger organisations to appoint a dedicated Data Policy Officer.
- Supporter consent; this cannot be overstated enough, to develop any data-driven marketing a charity will need to have unambiguous consent to hold personal data. So, make clear on all communications, your intentions regarding the use of data. For Direct Mail, it is still 'opt out' but ensure the opt out permission statements are clear.

NB. For any 3rd party data such as lists for cold direct mail campaigns, please check you're given data with existing consents. Also, any direct campaign data needs to be suppressed against MPS / TPS and in future, the FPS.

A charity must have the above in place to avoid potential fines and more importantly to protect the overall reputation of the charity brand, with its huge implications for supporter trust.

Make sure your data are clean

For any reporting and analysis the data held must be clean. Otherwise, any strategic decisions will not be based on solid foundations – leading to incorrect decisions being made.

What do we mean by clean data?

- Duplication of supporter records
- Incomplete data e.g. No postcodes
- Incorrect fields
- Categorisation is incorrect and inconsistent
- Merging of data from different sources is inconsistent

For any direct campaign, to reduce costs and increase responsiveness, you need to ensure there is clean data before any campaign data selections or analysis. From a supporter perspective, receiving two mailings with an incorrect spelling of a name does NOT endear them to your cause.

There are examples of up to 20% of database records being duplicates. Cleaning on extract may ease the impact on duplicate mailings, but the impact on analysis and reporting is still large – this could mean active file sizes being significantly over reported.

Before sending a direct mail campaign you should conduct a quick manual review of the file to correct any mistakes and identify duplicates. Additionally you should run your file against a service such as Mortascreen, which helps identify anyone on your list who may have died since you last contacted them.

Improving on the data you hold

All organisations collect data. However, what data is needed for the organisation to be effective? How often does it need to be refreshed? How is it collected? How is this related to existing data / systems? Who makes the decision to collect the data? These key issues need to be agreed, implemented and regularly reviewed in the light of the current hardening attitude to data.

For instance, collecting date of birth (with the right consent) can be very important to an organisation to send the right communications. If an established relationship is in place, perhaps for the older supporter a communication can be sent for a legacy pledge. Without age, this becomes more difficult.

Collecting further data is a strategy in its own right. With the correct regulatory processes in place supporters dedicated to the cause would be happy to provide more information if they understand why you want it.

Consistent categorisation of data

One of the biggest obstacles to a consistent data strategy is the lack of a consistent taxonomy for data that is collected. So for example, one person might tag their appeal as a Cash Appeal whereas a different person might call it the ‘Abandoned Puppy Campaign’. Without specific knowledge, it is not immediate these are one and the same thing so might not get grouped together. It is therefore important that all campaigns are clearly labelled with the channel, product and ask of the appeal and subsequent responses similarly.

It’s also important to know what prompts response and what doesn’t, so a simple analysis of the topic and ‘style’ of the appeal is important. Was it emotionally soft or hard? What subject did it deal with – children/adults, disabled people etc?

As well as communications and transactions it is also important to source and date stamp all other entries onto your CRM (including amendment dates to highlight when they are subsequently amended) to ensure that they can be audited and properly understood. Among others, this includes suppressions, campaign preferences and legacy statuses.

Data Enhancement

Understanding your supporters, and therefore communicating with them effectively, will largely be driven by how they currently behave with you, i.e. by analysing the data on your database. However, 3rd party data can help provide more depth to your understanding of donors (who they are, what they like, what they do) as well as filling in gaps where internal data is limited (new or occasional supporters). They are many suppliers of data on the market who can tag extra information to your database. This is generally done at an individual level (name and address) or at a postcode level. Individual data will usually be more accurate but more expensive and will get less coverage. Postcode level data is cheaper and you can usually cover everyone as it is based on where they live.

But remember make sure you have the consent to do this, and you have good reasons for doing so. It is rarely necessary to hold all this information on your database but occasional profiling can be useful and if it highlights particular nuances in your supporters, then holding this specific information may be worthwhile.

Many charities for instance, profile their current donors so that, when they do door-drops looking for new donors, they choose roads likely to deliver similar donors and the messages and ask values favoured by each profile.

Step 2: How to ensure one view of the supporter

Data for individual supporters often resides in silos across an organisation, which is often the reason things go wrong. The sources of data can come from various places including external, operational, social, digital and campaign data.

This means developing a Single Supporter View (SSV) to create a master record that consolidates information from all inputting data sources, ensuring that each master record reflects the most accurate and up to date view of every individual supporter. An SSV will empowers organisations to identify trends, risk and opportunities to inform decision making and improved communication strategies.

It removes the danger of people being viewed in isolation on one relationship they hold with the charity rather than holistically in terms of all their touchpoints. For example, the Direct Mail team may see Mrs Smith as a cash donor, but she may also be a follower on Twitter, a campaigner and a beneficiary.

An SSV is one of the most important factors in delivering a good donor experience. Do not accept excuses from any colleague who presumes to hold onto 'their database' of supporters. Such chauvinism is inappropriate to a donor-centred strategy.

How can this help with direct mail?

For existing supporters, it helps with strategic insights and the ability to build models that will help an organisation develop the right communications strategy e.g. Propositions / Products / Asks

Understanding their previous DM response is one thing, but knowing what else they are doing can change your perception. Somebody who is actively opening emails and browsing your website might be showing the propensity to respond to a DM appeal even if they have never done so before. Knowing what emails or webpages they are engaging with could inform the content of the mail piece you send them.

A cold mailing file MUST be deduped against the SSV file to avoid any thought of mailing a current donor with a cold ask.

Step 3: How to understand data insights to inform strategy

A direct marketing communications strategy comes from measuring and analysing the patterns in the data. By asking the right questions of the data and uncovering insights means the organisation can drive the communications strategy forwards.

How can data help communications strategy?

Data analysis will help broad strategic principles of acquisition, retention and reactivation:

Nurture: identify and understand the behaviour of potential supporters before making a donation

Activate: understanding the communication variables that drive response and sign-up -such as propositions, recruitment channels, giving methods

Develop: understanding supporters' giving behaviour in order to provide the insights to increase their commitment to the organisation (e.g. increased giving)

How does data analytics make a difference?

By applying the right analytical approach to the data, an organisation can make a difference to communications performance:

Data analysis underpins supporter communications in 4 areas:

1. Reporting - What happened? By establishing key KPI's and metrics a charity can understand past trends to inform future strategy e.g. reach, preference, response / conversion rates, average gift, ROI (return on investment), LTV (lifetime value)
2. Analysis - Why did it happen? By unearthing strategic insights from the data a charity will know how best to advise on nurturing, acquisition, retention and reactivation in the future
3. Monitoring - What's happening? Continual monitoring of live interactive campaigns allows a charity to continually optimise the campaign communications
4. Prediction - What will happen? Through predictive analytics and propensity modelling a charity can predict supporter behavior, which means the ability to suggest the best next action (product / ask). Equally, we can help forecast income based on past behaviour.

All the above should be looked at for individual campaigns. Additionally you can view your data by looking at analytics for specific programmes (eg all cash appeals), the overall performance (e.g. total net income) and by supporters (e.g. LTV). This ensures that outcomes are aligned to the organisational goals and strategies.

What does this all mean for direct mail?

Depending on a charity's maturity, elements of Points 1 to 4 above are needed to ensure the best outcomes for any direct mail campaign. Data analysis will provide insights as to how best to target an audience; who they are; what product is best; when to send; what ask level will work.

This is not exhaustive but some examples for different direct mail campaigns:

Cold mailing:

Analysing an existing audience will highlight audiences that have a higher propensity to give to a charity. Therefore, giving the best chance for a campaign to succeed

Post campaign analysis will allow you to review list performance – response rates / cost per donor etc

Integrated channel mix can be reviewed if response is digital e.g. page reviews / time / conversion

Gap analysis may prove there are audiences that are under-represented so necessitating a review of the charity offering to these audiences

Often direct mail is not sent in isolation which means the integrated journey needs to be broken down into metrics to understand response / conversation rates. For instance, a call to action online will mean pulling together digital data (social / website) to understand the full picture

Welcome programmes

Welcome campaigns vary depending on the source of recruitment and the type of product e.g. Sponsorship vs. Regular Gift vs. Cash

The best welcome programmes deliver the best, and pre-tested, campaigns in a range of media, for at least a year before the new donor is slotted into the core appeal programme

Understanding past behavior of recruits will highlight core attrition times – the times most supporters lose interest in the charity's cause. This analysis encourages research to understand failing motivations and highlights points when a product or new communication should be put in place to remind supporters of the value they bring to beneficiaries

Testing and data analysis would pinpoint the best time to send such communications in order to ensure the donor experience is optimised

Warm

Supporters will have different levels of commitment to a cause – which would necessitate a differentiated communications strategy. Effective data analysis should be used to ensure all your supporters are being mailed appropriate communications relevant to their needs and interests – and ones most likely to prompt a response. It can also help determine optimal mailing patterns and journeys.

Simply looking at the recency of the last gift and the frequency of previous gifts will determine those supporters most likely to respond to a specific campaign (i.e. those who have responded most often, most recently). And the value of their previous gifts will determine whether it is profitable to mail them.

But from the donor's point of view, you should establish some common-sense mailing criteria:

- If the donor hasn't responded to three appeals, make sure they get an appeal that talks about the subject which first prompted them to respond
- If they still don't respond to an appeal, ask them to do something else – fill in a questionnaire, buy a prize draw ticket, take out Weekly Lottery membership etc
- If you mail a donor six times a year and they only ever respond once, either cut down their mailing programme or, better, ask them how often, and with what, they'd like you to write.

Don't mail, simply to make up numbers or to deliver on excessive budgets. Doing that makes donors feel pressurised.

More sophisticated modelling (introducing other variables such as recruitment channel, other giving profiles, age or demographics) can then enhance processes even further and identify other donors who are likely to respond. For example, a raffle donor with a similar profile to other cash donors could be identified for a cash mailing (even though they have never given cash before).

Past analysis has often found up to 50% of mailing programmes being sent to supporters who are never likely to respond. Identifying these and removing them from the mailing can save thousands of pounds and manage supporters' perception of a charity over-mailing.

Furthermore, replacing these with donors who have not previously been selected (but are likely to respond) can engage more of your supporters and release thousands of pounds in untapped income.

Testing

Good practice is to formulate a plan for communications that will test different creative treatments. It is vital when designing the plan to ensure all tests will produce robust and actionable results. And, of course, the results of the tests are fully analysed, clearly communicated and fed into subsequent communications.

By running pilots or tests, a charity can isolate the variables that providing the best results for the donor experience. For instance, which creative proposition produces the most response and engagement, or which prompt amount delivers most net income. For instance, if a group of donors have not been responding, then reduce the ask levels. Response will follow.

Please remember data analysis provides the insights to drive a communications strategy. However, a data-driven approach still needs to be informed by audience research (qual / quant) to derive the best creative proposition / messaging, a good creative idea and a need for some commercial sense around integrated and differentiated marketing.

Step 4: How to provide clear campaign objectives

There's nothing new in this

The success of a campaign can only be measured if campaign objectives have been set. This means KPI's and diagnostic metrics need to be identified and aligned.

So, to use a well-used acronym, objectives need to be SMART. (Specific, Measurable, Achievable, Realistic and Timely)

They also need to be fed from the top down, so that individual campaign goals are aligned to achieving the organisation's overarching targets whether this is to optimise short-term income, build the active supporter file, create deeper engagement across existing supporters etc

Ask yourself, is the campaign – to test specific campaign variables, to increase donations, to increase retention, to build awareness of an issue? What is the duration of the payback timeline – 1 ,2 or 5 yrs – in order to define the success measure. Which typically in direct mail is ROI but increasingly in the future, may involve the subsequent ability to encourage a legacy gift?

What does this all mean?

A data-driven communications strategy means that more intelligent campaigns can be delivered to supporters, giving pleasure instead of the feeling of pressure to support.

Developing a data driven culture does not happen by itself but does not necessarily require massive capital investment. However, it does need careful strategic planning and a co-ordinated roll out across the organisation. The results will be a more holistic understanding of your supporters enabling you to communicate with them in a more effective and engaging manner. And will help ensure your direct mail communications are relevant, appropriate and an integral part of a comprehensive overall communication strategy.

It can be achieved by having clean data, bringing it together into one place and establishing campaign objectives and applying the appropriate analytical techniques and models. Ultimately, using appropriate data analysis will deliver appropriate communications to each supporter which fosters trust, commitment and satisfaction. Therefore, a stronger and longer lasting relationship through whichever KPI and metric a charity wishes to establish.

The benefits of a clear data strategy will mean:

1. **Personalisation and targeting.** If you know your supporters, you can service them better. And make your direct mail more engaging and relevant. As a fundraiser, your job is to delight your supporters
2. **Efficiency.** A good data strategy means you will hit fewer data related roadblocks. Buying new technology rarely fixes a lack of an underlying data strategy. Instead good processes will make your campaign cycles more efficient – and effective
3. **Multichannel co-ordination.** Consumers expect a seamless user experience. Data underpins the ability to service customers via the channels they may choose to use. This ensures mail is used where appropriate – whether in isolation, or in combination with other channels
4. **Supporter centricity culture** A culture based around your supporters needs