

The donor's experience is a direct result of your culture and how much you respect them

Project 16. Creating a distinctive service culture

Richard Turner, Joe Sutton, April 2017

The original brief

Notoriously, charities have consistently underinvested in even basic customer service, both people and systems, which undoubtedly affects the donor experience, particularly retention. This project will define the components of optimum levels and standards of donor service to ensure consistent quality experiences with the aim of defining a distinctive service standard to which all charities can aspire.

Intro – What's inside?

How does the Camphill Village trust get an over 60% response rate from their Christmas appeal? What is the critical question that Cancer Research UK asks its supporters before developing any fundraising project? What is the culture within Haven's Hospice that led to a £3 million legacy? Read on to learn how organisations create a culture that provides exceptional supporter service, leading to a better supporter experience.

The approach

A request for people to participate in this project was made through those who signed up to the Commission on the Donor Experience website and through the Linked-in Supporter Care forum. Interviews with those who contributed to this paper were conducted throughout 2016.

1. Summary guidance

Why bother?

The customer's experience now matters more than at any other time. Why? Anyone can share their experience – both good and bad. Think about Amazon reviews or Trip Advisor, or simply sharing your experience on Twitter or Facebook. If this applies to the commercial world and their customers, then why not for charities and their supporters?

A customer's experience can now impact on an organisation's reputation. Your reputation after all is what other people say about you.

It goes further. Increasingly in a world with an abundance of information, we value the opinions of sources we trust to help filter information out and help us make choices. These could be friends or colleagues, or simply other customers or of course, donors.

Again, reputation really matters.

How can charities deliver a great 'customer experience' and a responsive 'customer service' such that it helps build their reputation, results in inbound leads from referrals, and encourages 'customers' to return? Customer service is now totally strategic as part of raising funds on a sustainable basis. This is not about satisfying the donor and meeting their expectations. This is about wowing donors plus going beyond them and dealing with those times someone is dissatisfied in a way that does not damage your reputation.

A note on language

Should we use the term customers, donors or supporters? With many causes, donors can also be beneficiaries. 'Customer service' cannot be seen in isolation, i.e., just focusing on donors, so we have adopted the term 'supporters' to cover anyone who has an interest in your cause/services – including donors, prospects, campaigners and beneficiaries.

Your charity may have a single individual who deals with supporter care, an entire team or a department. It may just be a shared responsibility amongst the few staff you have. The principles outlined here can apply in all of these situations. We have assumed that you have a Supporter Care or equivalent team but appreciate this will not always be the case. When we use the term 'team' we mean everyone who has a direct part to play in providing the service to your supporters.

The challenge we are addressing

Creating a culture that delivers a great experience or service for supporters means creating a culture that delivers a great experience for anyone who contacts you – even if it is a complaint. Think of a time you made a complaint to a shop that was dealt with so well you felt even better about them!

As this is now of strategic importance—because of the impact it can have both on your reputation, retention of donors, and even attracting new ones—it needs to be front line and a priority. Supporter care is often parked to a role or a team. Its function is often very efficient, such as processing donations, but often not influential. And yet it can play a critical role in feeding back to the organisation what supporters are thinking and feeling. Perhaps if charities had effective ways of listening to donors they might recently have picked up on some donor concerns more quickly? Delivering a great supporter experience must not be seen in isolation—it now needs to be something the entire organisation is aware of, values and takes responsibility for, alongside a team or role assigned the title, ‘supporter care’. Hence it needs to be part of your organisation’s culture.

The challenge is how to create a culture throughout the organisation that results in an outstanding level of ‘customer service’. This of course includes responding to donations – but also extends to requests or enquiries that are not straightforward, and any interaction with potential supporters.

1.1 Principles

These are the key principles that we recommend if you want to create a culture of exceptional service that helps to deliver a great supporter experience.

Principles:

1. Customer service and care **now really matter** – anyone in your organisation who could interact with a supporter (just about everyone) needs to understand this. So, you need a vision to work towards and ways of reminding staff about its importance.
2. You need to be **constantly learning** – and that means listening to your supporters, encouraging and responding to feedback that will help you improve and ensure that your vision matches their needs.
3. Your responsiveness and how you make people feel from the experience you provide **needs to impress** ‘the customer’, not just satisfy them. The way to achieve this is step by step.

Look after your supporters and they will look after you

“A lady phoned about looking after sheep. We did not fob her off. We were tenacious in finding someone who could help although it was not an area of knowledge for us. She left us £1 million in her will.”

Phil Young, RSPB.

1.2 What can I do straight away?

These are the steps to start implementing right now.

1. Understand and explain WHY supporter service is now critical and strategic.

First it is key to get across why supporter service now matters to the leadership of the organisation: not just to mitigate bad press and to handle complaints, or even because it is the right thing to do (which of course it is) – but also for the strategic reasons outlined above.

Back in 2005, Sargent and Jay's report, [Redefining Commitment](#)¹, concluded that quality service leads to greater commitment from donors.

*“To summarise - donors who share the beliefs of the charity and express higher levels of satisfaction with the **quality of service** provided to them are significantly more likely to express higher levels of active commitment. Similarly, the factors multiple engagements, trust, learning and personal link all have a role to play in fostering active commitment.”*

Redefining Commitment, Sargent and Jay, 2005

2. Create your vision and turn it into action.

Identify all the key roles that are critical to delivering a service culture and work with them to create a vision. This includes any staff that answer the phone, your supporter care team, those that deal with inbound digital communications, and those involved in outbound communications. Create your vision of what you want your supporters to feel because of the service culture you provide. Then start to unpack what that means in terms of everyday actions. As a starting point you could use the service standard we have provided in the Appendix.

a. Set yourself targets that will help to achieve the vision.

Set the targets you need work to that will deliver the level of excellence you aspire to in your vision. What are the important metrics that you want to fulfil? Do you want to send thank you letters within one day or three days? How quickly will you answer a complaint? How quickly will you answer a query not directly related to your work? Again, over time you can ask supporters what they want and capture feedback as you go. Discuss whether it is better to send a quick reply or take a bit of time and make it more personal. Create wow...but not within expectations. You now need to go beyond them!

b. Create a set of values and display them proudly.

Agree with your team on a set of values that you can live by. You can change them and refine as you go along, but your values start to make it quite clear what you should do and should never do. For example, Hope and Homes for Children have the values: excellence, integrity

¹ <http://opencreates.com/wp-content/uploads/2011/08/open9.pdf>

and courage displayed on every wall; UNICEF's Supporter Care team's values are choice, recognition and voice.

c. Link your vision, targets and values to actions.

Visions, values and targets you have set are meaningless unless you determine what they mean in terms of actions you commit to do. Translate those values into actions and check back against your vision. For example, if 'choice' is a value what does that mean for what you offer supporters?

3. Share your 'bright spots'.

What examples do you already have of superb supporter care or service? Ensure you capture and share them in a regular email circular, staff meetings and inductions. Consider keeping a library of great moments and use these to define those elements of excellence.

4. Think like a supporter.

Today, you can start to ask, "What would this look like to a supporter?" and put your answer into practice. Better still, have a particular supporter in mind. Consider giving him or her a name and get staff to ask, "What would xxx think?". For example, this could help you determine whether you are sending out too many emails, or even whether you are communicating enough to supporters.

An effective way to do this is to introduce simple every day memorable reminders of your supporters. Simply imagine that a supporter is in the room for everything they do.

5. Proactively seek regular feedback from supporters.

It is critical to ensure that you have a constant feedback loop so your level of service is constantly improved. Determine all the ways you can constantly encourage feedback from supporters where possible. Invite supporters to communicate on what they thought of your last mailing or email. Better still ask them **WHY** they donated to you at the time they give? Ask them if they are happy with the communications they receive. Use this feedback to inform how you behave and what you change; share the feedback with your supporters, together with how you have responded, to show that you have listened.

6. View complaints as another opportunity to impress.

Logically, if a customer has no reason to complain, their loyalty might increase. Conversely, if they have one or more reasons to complain, we might assume that their loyalty might decrease. However, a wide body of evidence shows that where a customer has complained and received a proper response, they will become more loyal than if the problem had never arisen.

7. Deliver wow thank yous.

A thank you is the one communication you can almost be certain will be read. So, it is worth putting in some effort to help make it something memorable that supporters enjoy receiving. For more guidance, please refer to CDE Project 4:

Thank you and welcome, compiled by John Grain.

8. Read about what works.

The following books are simple but inspiring short reads recommended by fundraisers who have contributed to this project. Order the books and circulate them around the team.

How to Wow: 68 Effortless Ways to Make Every Customer Experience Amazing by Adrian Swinscoe. An informative book full of bite-size case studies and tips about how you can transform what you do.

FISH A short story about the Seattle Pike's Place fish market, and their customer-focused service culture. There are four key principles: Choose your Attitude, Be Present, Make Someone's Day, Have Fun.

Raving Fans by Sheldon Bowles.

"Your customers are only satisfied because their expectations are so low and because no one else is doing better. Just having satisfied customers isn't good enough anymore. If you really want a booming business, you have to create Raving Fans".

Raving Fans by Sheldon Bowles.

1.3 What can I do in the future?

These actions take a little longer and/or need to be done over a period of time.

1. Invest in resources and people.

Most charities have not traditionally invested sufficiently in customer (i.e., donor) care. This culture has to change. For this to happen, charities have to recognise that supporter care is an investment that repays handsomely in donor satisfaction, retention and future giving. Consider investing more resources, expertise and experience in your team that deals with inbound supporter communications and care of supporters, due to its strategic importance. This may mean reviewing salaries, and determining what can you put in place that does not just achieve the minimum but goes beyond expectations when someone contacts you. Good customer care staff should be highly valued and rewarded as much as any other fundraising staff.

2. Make your 'donor promise' public.

Write a supporter or donor promise—a statement of your pledge to supporters that will hold you to account. The very process of writing it will help you think about the issues. Publish it. It could even be a blog or a communication you send out to supporters (that will ensure you make it plain speaking). Here are some elements that you should consider:

- Be ambitious. Although your supporter charter may state your commitment to following the law and accepted practice guidelines such as data protection it should go way beyond this.
- Demonstrate **HOW** you are doing what you promise. For example, provide a web link to the part of your site that demonstrates the impact the charity is having.
- Be accessible, for example, consider providing the names of your team members responsible for inbound communications with a photo and details of how to contact them.
- Encourage donors to let you know if something has gone wrong. Give instructions on how to make a complaint.

3. Enable everyone to inspire your supporters.

When you interact with supporters, it is an opportunity to talk about your mission. Are staff able to inspire people with the conversations they have? Are they able to tell a story? Ensure that all staff can do this, whether it is through exposure to your projects or engagement with staff responsible for service delivery. For example, encourage staff to visit and immerse themselves in projects to obtain their own stories they can tell personally. Consider providing story telling training to staff. For some examples of how charities approach this, [see the top tips](#) in the next section.

4. Share and encourage good practice.

Create opportunities for staff to showcase the level of supporter service they are providing and give them recognition. This could be a simple weekly email shared around the organisation that includes anecdotes of good practice, or inclusion of great supporter service in annual awards or any end of year reflections. Make supporter service a part of annual appraisals – ask for examples where someone has helped to provide exceptional service for a supporter.

5. Get input from your supporters.

List all the ways that you can involve supporters and actively listen to them throughout the course of a year. Create structures for speaking to supporters, for example, putting aside a whole day for everyone in the organisation to contact supporters and thank them. Find supporters or board members who will come in and volunteer in your team. Consider involving supporters in your editorial committee for your newsletter or your next appeal by contributing some content. Run annual focus groups so you can have a conversation about your fundraising. Or simply hold a supporter day, a chance they can meet other supporters as well as you.

6. Work out your indicators and measure/capture them.

Determine the indicators that will show you are delivering the level of supporter service you aspire to. This will not just be response times to donations, enquiries, and complaints – although response times will be one factor. Consider introducing a way for supporters to rate their experience of interacting with you (as seen on Amazon, or Trip Advisor reviews). Track positive feedback and complaints and benchmark this against previous years and against the amount of activity you do.

Consider measures such as Net Promoter Score as a basis for measuring your level of service. Net Promoter Score asks supporters to rate you on a scale of 1-10 by asking one question:

“On a score of 0-10 would you recommend our charity to a friend or colleague?”

For a case example of a charity using the Net Promoter Score along with more suggestions for measures, see CDE Project 3: *Measuring satisfaction and loyalty: How do your donors feel?*

You will also find an [example of how UNICEF monitors complaints and uses this to alter behaviour along with top tips](#) in the next section of this document.

7. Go mystery shopping.

At the very minimum, put yourself in the shoes of a supporter and work through each step of making a donation, at each stage asking yourself how it made you feel. Better still, formalise it. Arrange for someone, or several people, ideally outside your organisation, to donate in a number of ways, by phone, online, and by post and get them to record how your organisation responded, what were the first and subsequent communications, and how they felt as a result of receiving them. You could ask friends or family, or even fundraising peers in other organisations in return for you doing the same back, for them.

There are even initiatives that run mystery shopping exercises and will compare your organisation against other similar organisations. You could also ask colleagues who give to other charities to track their responses and see how you compare.

8. Plan a supporter journey.

Planning a supporter or donor journey is an effective way to ensure that you have a conversation internally about how you treat your donors after they give.

Remember it is a planning process. People are unlikely to do what you want them to or what you think they will do—but the very act of having the conversation internally will help you prepare.

Fundraisers often think of the supporter journey as the sequence that turns someone from a cash giver to a regular giver and then to a legacy pledger, or it is the sequence of what you send when. It is really neither of these, although both could be outputs or the impact of developing a supporter/donor journey.

A far better way to think about the supporter journey is that it is the **story** you would like your donors to hear. Like all good stories there are different stages, from the opening ‘grabber’ that got their attention and made them first donate, the need for more help when things get difficult, to the final celebration.

For more information on thinking in this way and preparing an appropriate supporter journey see CDE Project 5: *The Supporter Journey*, compiled by Morag Flemming.

2. Case examples, tips and links

This section provides **top tips** from fundraisers, some **case examples**, **links** to helpful blogs and other useful sources of information that help to illustrate each of the actions recommended in the summary.

With contributions and case examples from:

Chickenshed, Cancer Research UK, Crisis, Haven's Hospice, Hope & Homes for Children, Ashgate Hospice Care, RSPB, Oxfam, SolarAid, SOFII.

Also included are two case examples from the private sector, Cabot Financial and Orange, about how to bring about cultural change in an organisation.

Case examples and links - Creating a set of values

Blog links – Values worth considering

As a starter, consider these three areas: **integrity**, giving **excellent service**, and being **inspiring**. Ken Burnett has detailed these values in this post: [Fundraising and the rule of law](#),² and provided a useful description of what integrity means to us as fundraisers here: [Something called integrity](#).³

Blog link – The case for putting the donor in control

In this blog post, asking [Are you prepared to take a leap of faith?](#), Jackie Fowler of Burnett Works outlines the philosophy adopted by Camphill Village Trust, of putting the donor in control of what they receive when, with some impressive results including a 61% response rate from donors who chose to hear from them at Christmas only with donors giving on average for over nine years.

A standard for excellence in supporter service

The Cabinet Office has developed a [customer service excellence standard](#) and guidance for achieving it. The standard cites five key criteria:

1. **Customer insight** – consult with your customers and measure the outcomes of the service you provide.
2. **The culture of the organisation** – develop a commitment throughout the organisation from the strategic leader to all front-line staff to build and value a supporter focused culture.
3. **Information and access** – provide information through the most appropriate channels for your customers.
4. **Delivery** – make adjustments to provide a better service by listening to your customers' views. This is of equal importance to achieving performance targets.
5. **Timeliness and quality of service** – maximise customer satisfaction through the promptness of your initial contact and keeping to agreed timescales. However speed can be achieved at the expense of quality, therefore the issue of timeliness has to be combined with quality of service to ensure the best possible result for customers.

See http://www.customerserviceexcellence.uk.com/CSE_Standard.pdf.

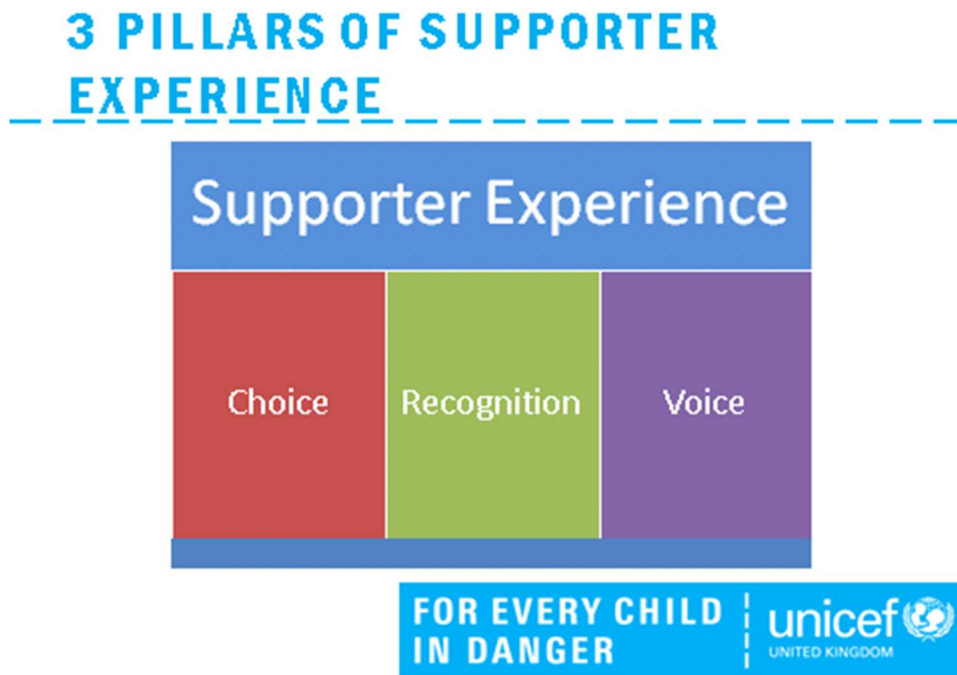
² <http://www.kenburnett.com/Blog55Fundraisingandtheruleoflaw.html>

³ <http://www.kenburnett.com/Blog70integrity.html>

Case example: UNICEF – 3 pillars of supporter experience

Our principles are on the wall and are regularly refreshed.

We have three principles or “pillars” to define our work:



1. **Supporter choice** - defining how supporters want to be communicated with.
2. **Recognising support** - acknowledging the importance of supporters. We still have a long way to go on this but we want to show impact of support. Ways we do this are through feedback mailing and anniversary cards (after one year of giving).
3. **Voice** - analysing every supporter query and every direct engagement. We code it and measure responses to all activities to track trends. For example, when emergencies occur, how are supporters reacting? We had a large number of messages about doing an appeal around Gaza so we could see there was a desire from supporters to provide for this cause, so we launched an appeal through social media.

Vicky Johnson, UNICEF

Case example: Chickenshed – Set your goal, then get organised

After we set our goal “to inspire, retain and grow support to reach more people and inspire more lives”, we reorganised our box office, marketing and fundraising teams to meet it.

Lily Davies, Chickenshed

MARKETING, FUNDRAISING & COMMERCIAL DEVELOPMENT (2016-2019)

WHAT WE WILL DO

WE WILL INSPIRE, RETAIN AND GROW SUPPORT FOR CHICKENSHEED, SO THAT WE CAN REACH MORE PEOPLE AND CHANGE MORE LIVES THROUGH INCLUSIVE THEATRE.

HOW WE WILL DO IT

WE WILL INSPIRE SUPPORT THROUGH ENGAGING AND MEMORABLE STORYTELLING, COMMUNICATIONS AND EXPERIENCES

WE WILL RETAIN SUPPORT BY PUTTING RELATIONSHIPS AT OUR HEART; PROVIDING FIRST-CLASS CUSTOMER SERVICE AND ADDING VALUE THROUGHOUT THE CUSTOMER JOURNEY

WE WILL GROW SUPPORT BY LEADING BEST PRACTICE IN FUNDRAISING, DIVERSIFYING OUR REVENUE STREAMS AND MAXIMISING VALUE FOR COST

Case example: Hope and Homes for Children - “Live by your values”

“You see them in every room in the building: excellence, integrity, courage, our values placed next to our vision - everyone can tell you what they are.

If you haven’t yet written down a set of values for your organisation I recommend that you sit down with your team and write them together. Splash them on your walls, on mugs, on mouse mats, make them part of your development and performance. Values openly displayed give staff the confidence to ask - does this reflect our values? It also makes it difficult to behave outside those values. Then live by them”.

Joe Sutton, Hope and Homes for Children

Hope and Homes for Children was set up by Mark and Caroline Cook in 1994. With little experience of fundraising, they grew the charity through networking through their friends and networks exploiting Mark’s passionate speaking and storytelling. They were amazed when the first gifts came in and they wanted to treat donors how they would want to be treated - to be thanked properly, to be treated as people and not to be over-marketed to.

Joe wrote these supporter values in July 2016, to define their approach at Hope and Homes for Children.

1. The personal touch

What does this mean? This means that we show our gratitude by putting (demonstrably so) time and consideration into all our communications, particularly thanking. All our thank-yous are handwritten or on the phone. The “thanker” has looked up the donor on the database, has noted their history and has spent time thanking them. If they told us about their dog/rotary club/grandchildren, we ask them about their dog/rotary club/grandchildren.

2. Treating people as people

What does this mean? That we write and speak to people in a normal, friendly way as if they were a respected friend or relative. As if it was our mother on the phone or receiving your letter. When we write or speak we use normal, plain language not jargon. We speak with passion and knowledge about our work. We involve our supporters in our fundraising: we consulted our supporters through focus groups and a test mailing before embarking on a wider campaign, we have started to involve supporters in our editorial committees.

3. Treating supporters with gratitude and humility

What does this mean? Donors do not have to give to Hope and Homes, they could spend their money on something else, but they do. Every gift is a kind gesture and is valued. We seek to maintain a high level of transparency in all that we do and in demonstrating how supporter’s gifts are used. We do this through our communications and language and the tone of voice we use. For example, in a recent regular giving appeal we ensured we thanked supporters as part of our request for a donation.

4. It’s about the supporter...

What does this mean? We work with other teams to ensure that the donor gets the best possible experience. This means collaborating and planning over other teams’ communications and passing the “management” of donors between teams or not, according to what is best for the donor.

Top tip - Share your 'bright spots'

Top tip: SolarAid – Tell staff why donors give

“We introduced a simple free text box after people gave on line, that asks why they had donated. What was great is we would get some lovely messages from donors. So, each week I would pick the best and send them around the entire organisation, including our offices in Africa and our trustees. It was a really easy way to get across the passion of supporters and that in turn started to help generate a great respect for them within SolarAid.”

Occasionally we would get some insights too. This was how we learned people were giving to us to offset their carbon footprint. As a result we changed our SEO terms so that anyone searching for carbon offset charity, SolarAid would pop up”.

Richard Turner, SolarAid

Case examples and top tips - Think like a supporter

Top tip: Oxfam – Put yourself in your donor’s shoes

“We ensure we look at the emails we send from a supporter’s perspective. This demonstrates when supporters are getting too many asks.”

Laura Hazle, Oxfam

Case example: Crisis – Supporter in the room

Crisis have introduced a “supporter in the room” initiative. This simple but effective concept assumes that there is always a supporter in the room, and as a result it ensures staff use the appropriate language and think much more with their supporters in mind.

At Crisis we imagine that there is a supporter in the room with us at all times so that we can be proud of everything we say and do, particularly when discussing, planning or doing any fundraising. This initiative is still evolving.

The media furore in 2015 caused Crisis to look wholesale at how we interact with supporters. It is clear the future of fundraising will look very different and we want to ensure we have the right ethos in place to meet this.

We use ‘Supporter in the Room’ to direct our language and therefore our approach.

For example:

- To ensure we are transparent with our supporters;
We no longer ‘target’ donors or ‘acquire’ new ones. Instead we ‘inspire’ and ‘engage’;
- We have reviewed all our partners to make sure they share our values;
We have developed non-financial KPIs to ensure we value supporter experience as much as donations;
- We are asking our supporters what they think more, and recording that feedback to measure loyalty and commitment;
- We have started to celebrate ‘Supporter of the Month’ and invite supporters to our away days.

And next we are about to use Supporter in the Room as a catalyst to radically change our entire approach to individual giving. We don’t know what it will look like yet, but we do know supporters will be at the heart of it.

Richard Moody, Crisis

Case example: CRUK – What would our supporters think?

This example from Cancer Research UK shows the benefit of bringing potential supporters into the core of your work.

The digital service industry is powered by trying to create user-centred content, and the lessons from this are directly applicable and scalable to fundraising. The digital services team at CRUK were responsible for delivering products for different teams across CRUK both in fundraising and other departments. The approach we adopted was for product designers and product teams to build empathy with users. In the Digital Services Team at CRUK we did this through putting staff in the room with the users and then to get product teams to watch live testing of products by end-users. This ensured that they had a clear view of the frustrations, limitations and positive experiences for users. They would perform these exercises with different teams every two weeks with 6-8 users. Introducing these sessions started to change how colleagues talked about and thought about supporters.

For example, when running a project for the information provision side of CRUK's work there had always been a tendency in the past to write huge amounts of information. However, we found those affected by cancer are only after very specific information. This insight was found out by testing different versions of copy with individuals to find out exactly what they prefer to hear. Testing was done using recruitment agencies to find individuals so they would be more representative of end-users (as opposed to specific CRUK volunteers who would already be involved with CRUK's work).

We saw this level of supporter involvement change behaviour within CRUK when the first question in product development that was asked would be, **“Have we tested this with users?”**

James Gadsby Peet, formerly of Cancer Research UK

Cancer Research UK's Digital Services Team brought the end-user into the development of every product. By adopting standard practice from the technology industry this practice was spread throughout the fundraising team. The question *“What would the supporter think?”* became central to all new product planning.

Useful Links - View complaints as another opportunity to impress

This blog piece by Michelle Carvill, marketing director of Made Simple, on [Why Customer Complaints are Absolutely Great](#)⁴ has the following insights:

- The average business never hears from 96% of its unhappy customers. For every complaint received, the average business has 26 customers with problems, of which six are 'serious'. So if you gauge the standard of your service by the number of complaints you receive, you're only dealing with the tip of the iceberg.
- Complainers are more likely than non-complainers to do business with you again - even though you have upset them and even if their complaint isn't satisfactorily resolved. Ironically, those complaining are doing so because they feel a connection with your brand and actually want to help you.
- Of customers who register a complaint, between 54% and 70% will do business again with the organisation if their complaint is resolved. That figure goes up to a staggering 95% if the customer feels that the complaint was resolved quickly.
- The average customer who has had a problem with an organisation will tell 10 people about it, and 13% will recount the incident to more than 20 people.
- Customers who complain to an organisation and have their complaints satisfactorily resolved tell up to 5 people about the positive treatment they received. It is also proven that the goodwill of a positive experience lasts longer than a poor one - and so their positive view of you remains. Make this a WOW experience and they will share with up to 10 people and the experience really 'sticks' - so you have turned a negative into a true positive.

So, replace 'customers' with 'supporters' by resolving complaints quickly, and the resultant goodwill can translate into positive publicity. This last point should form part of your marketing.

See CDE Project 18: *Supporters As Champions of your Mission*, compiled by Richard Turner.

⁴ <http://www.madesimplegroup.com/blog/why-customer-complaints-are-absolutely-great/>

Tips and useful links – Deliver wow thank yous

For inspiration to make sure your thank you letters are the best they can be, read these before and after thank you letters by Lisa Sargent on SOFII.

[SOFII · Sample thank-you letters for you to swipe⁵](#)

Excerpt: Use an engaging lead. Just like a good fundraising appeal, you want to draw the reader into your thank you. A great way to do this is to start with something other than “thank you” or “on behalf of”.

Then read this [Harry Potter Thankyou Letter](#),⁶ produced by fundraiser Adrian Salmon using the guidance from Lisa.

Top tip: SolarAid - Be prepared

“We produced a set of blank cards, using our best photos, a thank you from the team on the back and a blank inside. It means we can use them as we wish. We’ve even had donors take pictures and post them on Facebook and social media. One dad did an entire blog as a result of the thank you we sent his son who did some fundraising for us”.

Richard Turner, SolarAid

Top tip: SolarAid – I just phoned to say thank you

“You have a great excuse to call anyone who makes a donation and say thanks in person. Especially if their gift is a bit special. It’s also an opportunity to ask why they donated to you – and often you get some great insights about what motivates your donors as a result. I tried to make a habit of calling a donor each week”.

Richard Turner, SolarAid

There is an entire donor experience project on this important topic. Please refer to CDE Project 4: *Thank you and welcome*, compiled by John Grain.

⁵ <http://sofii.org/article/sample-thank-you-letters-for-you-to-swipe>

⁶ <https://www.linkedin.com/pulse/harry-potter-thank-you-letter-adrian-salmon-minstf>

Case examples and useful links - Make your donor promise public

Here are links to some sample fundraising promises and charters:

[WaterAid's Fundraising Promise](#)

[UNICEF's Fundraising Promise](#)

[Shelter's Supporter Charter](#)

[Oxfam's Supporter Charter](#)

[Kent Wildlife Trust Supporter Charter](#)

[Oxford Thinking \(Oxford University\) Donor Charter](#)

SolarAid published a blog and emailed their supporters: [Our commitment to you](#)⁷

5 SUPPORTER CARE ELEMENTS (HOW WE WANT OUR SUPPORTERS TO FEEL)

1. You talk, We listen, We help.
2. We want you to know that you have a genuine relationship with us, which is open, honest and valued.
3. We want to be your window to the wider world of UNICEF to explore learn and engage. We will guide you along the way.
4. We recognise that you fund our work for children and together we can make a better life for every child.
5. We will put you at the heart of everything that we do.



⁷ <https://solar-aid.org/our-commitment-to-you/>

Top tips: Enable everyone to inspire your supporters

Top tip: Havens Hospices – Shadowing staff

“We ensure every fundraiser, twice a year shadows another member of staff, I cannot underestimate the importance of this. For example, I once shadowed one of our nurses and helped them care for someone who had just come out of hospital – we washed her hair, painted her nails and gave her a glass of wine. This was an authentic experience that connected me with our cause and provided me with an experience to tell supporters.”

Vanessa Longley, Havens Hospices

Top tip: UNICEF– Lunchtime briefings

“We look to inspire through regular lunchtime team briefings from people in the field. Each year staff have the chance to go on field trips to our programmes.”

Vicky Johnson, UNICEF

Top tip: UNICEF and Havens Hospices - Play games

Both UNICEF and Havens Hospices have come up with ways of making their staff engage donors.

“We play bingo to include new stories in donor conversations. The aim is to complete your bingo sheet by including in conversations the key activities that are going on at that particular time.”

Vicky Johnson, UNICEF

“We encourage close contact with supporters by creating games rather than rules as my team are naturally playful. For example, every few months we organise a scavenger hunt: we pick an area where we may be delivering an event for example and give fundraisers a set of activities such as hand out 1,000 leaflets, or talk to 50 people. Examples in the past have seen someone blag their way onto local radio and get an ice cream parlour to all sing to camera!”

Vanessa Longley, Havens Hospices

If the above feels too much, start by focusing on a particular group of supporters as Crisis have done.

Case example: Crisis – Investing in donors

“Crisis Investors is a higher value regular giving 'product', we like to think they get better stewardship. There are approximately 2,200 supporters who are Crisis Investors. They receive fewer mailings. If we receive a 'goneaway' i.e. returned mailing we try to contact them by email or phone to find out their new address and to let them know that we want to keep in touch. They have a nominated contact point in the team but anyone can help them with queries.

One of the team was talking to one of our 'regulars' recently and the supporter mentioned that a previously homeless person that he had known had discovered art in later years through his contact with Crisis. The supporter said that this person had died recently. A sad turn to the call but we mentioned artwork by another client had been included as a bookmark in a recent raffle mailing, which this supporter had not received (!) and we sent a spare bookmark to the caller. He has since talked about the bookmark and how much he likes the artwork on it.

I think our approach is lots of small things that make the difference: trying to get salutations right when the supporter expresses their preference; changing contact preferences when asked; personal responses to emails; simply trying to leave people with a positive experience of Crisis whether they are a supporter or not or even if we weren't the right place to contact.”

Karen Hardy, Crisis

Case examples and tips: Work out your indicators and capture them

Case example: How UNICEF uses complaints to alter behaviour

“We use metrics to track **complaints**. Through text giving and follow-up phone calls we were getting a lot of complaints about too many calls and people not liking being called. We started to closely monitor trends to alter our behaviour accordingly. Using complaints management to spot trends and alter behaviours has led to less complaints. As every complaint is tracked we record this against things like the telephone agency used, the geographical location of the supporter, the type of fundraising etc. If we receive more than three complaints on a specific topic this triggers more specific investigation into that issue. We increased the detail of reporting which allowed us to see if, for example, complaints were triggered by an increase in calls being made or just the perception of this. **This led us to change certain behaviours** such as only doing one call per day and leaving a message.”

We **measure** supporter satisfaction through ratings left on live chat, online ratings on facebook and we are going to start measuring on telephone and text too.

We use three categories of **measurement** – compliments, comments and complaints.

Vicky Johnson, UNICEF

Top Tip: SolarAid – Amazon reviews

SolarAid have introduced an Amazon-style star rating system – inviting donors to rate their experience from 1 to 5, at the point of giving, which can include a comment.

Richard Turner, SolarAid

Case example and top tips for planning a supporter journey

Top tip: Oxfam International - The journey can change

“We develop supporter journeys but these **must be flexible** to allow what the donor wants so we can **change the journey at any time**. A supporter journey needs to be a balance of driving activity to meet an organisation’s goals, but also listening and acting on supporter feedback so that you can tailor and match the communications, to better engage and provide both a positive supporter experience and organisational outcomes.”

Laura Hazle, Oxfam International

For more information on how to create a supporter journey see CDE Project 5: *The supporter’s journey*, compiled by Morag Fleming.

Case example: Chicken Shed – Reviewing touchpoints

This simple process we use can help inform your supporter journey and look back at touchpoints your organisation makes with a supporter and asks you to think about what actually happened, who was involved, and how the supporter felt about it.

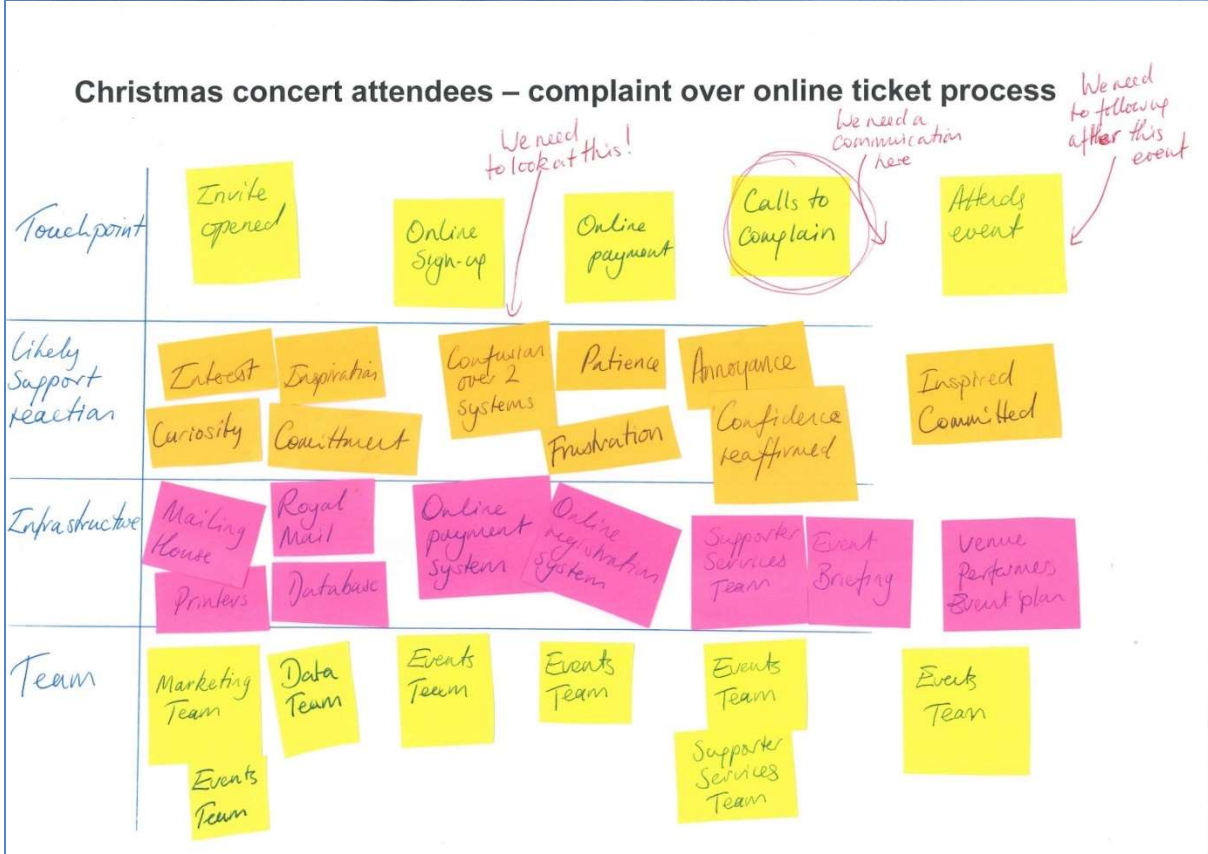
Triggered by a particular response such as great feedback or a complaint, this useful activity can also be conducted regularly to help you think about supporters.

Use a flip chart and some sticky notes. Bring in everyone involved. Create rows:

1. List the supporter touch points e.g. visited website, received Christmas appeal.
2. Who was involved in creating this touch point e.g. DM team, copywriter, web designer, data inputter.
3. How did the supporter feel?

Map out each touch point. Sit back and see what this highly visual exercise demonstrates.

Here is an example.



“From this exercise, we realised there is possible confusion when people sign up, that we need to build in a communication following a complaint and we need another touch point after someone attends an event.”

Lily Davies, Chickenshed

Case examples and top tips for making cultural change

Wendy Berry has 20 years of customer service experience including Orange and Royal Mail and is currently working with the Yorkshire Building Society.

Wendy has experience in working with new companies to create a specific culture right from the start, to big/blue chip companies working to change their culture.

Here are her tips to making cultural change:

1. Firstly, find exemplars. Is there anybody in your organisation who oozes the culture you want to put in place? Then look to break down what it is about them that makes them exceptional and bring this to life with case studies (otherwise defining culture can be like nailing jelly to a wall).
2. Develop your culture through a small group of people before growing further.
3. Make sure you create transparency in defining culture:
 - a. Involve a group of staff in defining your vision (this ensures you have representation).
 - b. Involve the whole staff in explaining why this vision has been chosen.
 - c. Check how your explanation has been received. Always check the quality of your internal communications.
4. Build in reflection time. It is important to have time to reflect and disconnect as life gets in the way of making change.
5. Create empowerment and give a sense of freedom. People need to be clear about their role and to be informed but they should not be micro-managed. The more freedom people get the more involved, engaged and innovative they will be. You need to give people permission to fail and you need to allow staff the framework to develop (e.g. having someone who can sense check their work whilst they learn).
6. Continue to involve people - customers, create culture champions, involve line management etc.
7. Ask your customers and engage them in the process.
8. Design your organisational structure around your desired culture, not the other way around. Use processes to enhance and define your culture: company policies, teambuilding, performance, appraisals, roles and responsibilities, meeting culture, etc.
9. Make someone senior responsible.

Case example: Orange – Changing the question

In this example, Wendy tells the story of changing the opening question to help improve the customer's experience.

We looked to change the process at Orange when customers would call in saying they had lost their phone.

The first question that was asked was, “*How did you lose your phone?*”. Customers would be anxious and wanted to be reassured. They want to know it will be okay, their phone is covered, they will get a replacement, that no-one else has used their phone. The question, “*How did you lose your phone?*” was defined by the insurance company that covered Orange’s phones. Therefore, this needed to change to “*Sorry about that, let’s see what we can do; where would you like a replacement phone sent?; let me check if your phone has been used etc.*”, i.e. we adopted a customer-led approach that was defined by the needs of our customer, not the needs of our insurance company.

We were so committed to making this change that it also led us to change our insurance company. We wanted to do these things differently and we recognised that there were risks.

This is just one example of how we began to change the culture at Orange for the better.

One Orange customer wrote to us saying they had been looked after so well that they couldn’t think of anything more the company could have done except buy him a pizza. So, we sent him a pizza voucher!

Wendy Berry

This example shows how you can even provide customer service excellence in a non-customer focussed industry.

Case example: Cabot Financial - "WOW and UH-OH" moments

Deborah Green, Cabot Financial

Cabot Financial Management specialise in the collection of debt. They purchase consumer debt and work with the customer to pay it back. They were founded 15 years ago and have 7 million customers. They are one of the biggest companies in this field in the UK and speak to thousands of customers every day. They employ 300 callers and have up to 150 people taking calls at any one time.

Deborah explains how they have gone about creating a culture that puts customers first.

"Our work is unique in that we are looking to form a relationship with someone who has not chosen to do so and then around a sensitive issue i.e. debt. Our mission is to help each and every customer to financial recovery. Our vision is to be the best at what we do.

Up to five years ago the customer was seen as a debtor and not as a customer. At this time, the industry was becoming subject to increased regulation and we wanted to rebrand the industry to being one of trust and excellent customer service. We also felt that if we treated the customer as a debtor then this would lead to the customer's journey feeling very fragmented. For example, if Cabot bought a debt account from a bank we wanted to ensure that the customer did not see any difference in service.

We developed a 5-year customer maturity model; this had the subject areas of:

strategy - the creation of customer treatments (i.e. how customers are treated) to deliver our strategic goals.

insight - collecting and analysing information about supporters to drive decisions.

design - innovation and customer solutions to gain commercial value.

delivery - change needs to be everyone's friend.

measurement - link our strategic business plan and understand how customer measurement drives the right behaviour.

culture - create an understanding that a true customer-led strategy is long term and shares a strong link between customer success and commercial success.

One of the best things we did was to engage a team of behavioural experts teaching us various techniques such as what questions to ask to gain trust. We created 10-15 techniques that helped us to gain the trust of our customers very quickly.

We joined the Institute of Customer Service. This enabled us to be benchmarked against other customer service providers. We were rated as world class.

We employed a company called Big Ears that enables us to give immediate feedback from customers. We feed these results back to our teams

The great feedback is called a “WOW” and this is shared across the team.
Poor feedback is called an “UH-OH” - and these are fed back to our callers and we look at how we can improve from this.

We look to ensure that all staff meet customers through customer feedback sessions.

Customer journey mapping is a really important part of our work and we ensure we put time aside to do this.

For example, when we receive a complaint we then map the customer journey. We visualise the journey and include recordings, letters and put it on a board. We involve everyone who is involved in a touchpoint with the customer, e.g., who designed the database, who wrote the letter etc, etc. We look at all this from the customer perspective and focus on what their emotional response would be to each touchpoint.

This is a very powerful tool. We need to remind ourselves that customers are humans – with families, health issues, debt, lives...etc.

Customer mapping always produces good opportunities for improving the customer experience. The CEO becomes involved and it helps to engage him. One time he could clearly see that we had not treated a customer well so he called the customer, apologised and cancelled their debt.

We created a role of Head of Customer Journey to drive this work. We invested heavily in speech analytics. We set up a customer and conduct team at board level for looking at the metrics for measuring results of calls and status of customers’ debt, i.e., how customer service metrics are driving our business. We even revamped our rewards structure to ensure that customer treatment is embedded in rewards. We have also put in place that fair treatment of customers comes before anything else and this has to have happened before you are eligible for any reward.

It is also important to look at all the other factors that motivate staff. We looked at creating a framework for staff development and creating customer care as a career path.

We are very pleased with the development of our culture and we are maintaining our high customer service score.

This was very, very hard at the beginning. The industry is relatively behind other customer driven industries such as mobile phones, insurance etc. We wanted to be seen as the best company to be in debt with!

Case examples and links for a culture of delivering a great service

This last section shares some examples of going above and beyond as a result of the culture that has been instilled in organisations.

This link takes you to ten examples from Zappos, an online shoe and clothing shop based in Nevada, USA, famed for unprecedented customer service.

[10 Zappos Stories That Will Change the Way You Look at Customer Service Forever](#)⁸

Here are just two (the link sets out the others including a 10-hour customer call):

Sympathetic gesture for a grieving customer

Zaz Lamarr needed to return some shoes to Zappos but her mother had just passed away and she was still coping from the loss so she didn't have the time to do it. When Zappos emailed her to ask about the status of the shoes, she replied about what happened. Zappos took care of the shipping and had the courier pick up the shoes for her at no extra cost.

Zappos didn't stop their customer care there. Zaz writes, "*Yesterday, when I came home from town, a florist delivery man was just leaving. It was a beautiful arrangement in a basket with white lilies and roses and carnations. Big and lush and fragrant. I opened the card, and it was from Zappos. I burst into tears. I'm a sucker for kindness, and if that isn't one of the nicest things I've ever had happen to me, I don't know what is.*" Now, that is what you call "going the extra mile."

⁸ <http://www.infinetcontact.com/blog/zappos-stories-that-will-change-the-way-you-look-at-customer-service/>

A hand-written card to remember

Beth, a blogger, first called Zappos because one of the zippers on the Ugg boots she purchased for an 11-year-old family member was broken. So Zappos arranged for the boots to be returned and to have the new pair shipped to them the next day. However, since the style was discontinued, they picked out a different pair which is cheaper than the first. Zappos refunded them the \$30 difference and had the defective boots returned free of charge.

Two months later, the boot broke again so she called customer service once more. The replacement pair was actually \$30 more than the defective one. But Danielle, the Zappos rep she spoke to, insisted that Zappos cover it, sent a label for a free return of the defective shoes and shipped the new ones the next day.

You'd think the service ends there. Beth received a thoughtful thank-you card in Danielle's handwriting. She was so satisfied with the service she received that she blogged about it and encouraged her readers to pass along the story to others.

Top tip: Oxfam – Can I justify this activity?

“There is a constant tension between resource and delivering but it's the overall quality that matters. I think as long as the balance is right then it is okay to go above and beyond. As long as we can tell supporters – can I justify this activity? If the answer is yes then that's okay.”

Laura Hazle, Oxfam

Top tip: YMCA England - Be flexible

“**Flexibility is important.** Some supporters want to support but in very specific ways, or want reminders to do so at certain times, or want to receive certain mailings in a different format. Whether it's attaching mailings as a PDF to an email, remembering to send out a batch of BREs to our regular supporters each year that prefer to give by cheque, or working out the best way for an existing supporter to continue their regular giving with a new European bank account, we always work to best achieve our supporters' request, regardless of the additional workload.

The main aim for us is to be most concerned about supporters when we have an interaction and not our fundraising aims as a charity. If a supporter wants to increase their giving but is concerned about the limits of their pension, we take time to really discuss it with them and reassure them that their needs must come first.”

Sarah Lewis, YMCA England

Vanessa Longley tells a series of unconnected stories that show the approach or mindset that is actively encouraged at Haven's Hospice. As the final story shows - it pays to look after your supporters!

“One of our supporters this year had signed up to a number of our events and came in to collect some buckets and balloons and talk through the events. She arrived rather frazzled with her 2-year-old son, who was tired, hungry and cross. My event fundraiser immediately rearranged the meeting to happen in the garden (so he could run around) and called for fundraising reinforcements. We arranged a sandwich for him (exactly how he wanted it - white bread, butter one side only, ham and a thin bit of mayonnaise on the other side!) and a proper meal and coffee for his mum (mums always leave themselves last) and another fundraiser played with him till his mum had finished her conversation and was ready to go.

We had a call from one of our supporters who holds a third-party event for us every year. She told us that this year she had decided to hold the event for a cancer charity, not for us, but still invited our fundraiser along as a guest. Our fundraiser went along, and when it was clear that a couple of the usual helpers hadn't turned up, she shoved on an apron and got stuck in helping with food and drinks throughout the evening. Our supporter was so grateful, she made a personal donation of £500 to our charity!

...

I've been swapping recipes and pots of homemade jam with one supporter for seven years. Every autumn he comes in to see me and I make time - not because there is money in it, but because it's the right thing to do!

...

A fundraiser was driving to work when they saw one of our elderly supporters (recognised from our open days) struggling with his car keys. She stopped to say hello and offer help - it turned out his wife had been rushed into hospital and he was struggling emotionally. The fundraiser gave the supporter a lift to the hospital, found where his wife was and escorted him to the ward. The next day she called him to check in, and finding out that his wife was in her last illness, popped into the hospital with some information for the supporter about the hospice. After his wife's death we were concerned the supporter might become very isolated, so we organised a rota, and took the supporter out every six weeks or so to various Hospice events or for a coffee etc. He died two years ago...both the fundraiser and I were left instructions in his will asking us to arrange his funeral in line with his wishes....and he left the charity £3 million!”

Vanessa Longley, Havens Hospices

Appendix – A standard for excellent supporter service

If we had a standard for excellent supporter service and care what would it be?

We want to delight our donors so we have drafted the standards we aim for as we hope they would be expressed by a truly delighted donor.

- When I send a donation to you by post, you will send a prompt acknowledgment reassuring me that you have received my donation.
- If I give online, as well as an automated confirmation of my donation, I'd like a real person to acknowledge my donation and the impact it will have.
- Giving to you online is a joy and a satisfying experience, not a painfully slow and cumbersome one that leaves me frustrated.
- If I phone, I can quickly speak to someone who can help me with my enquiry or arrange for someone to get back to me. Someone can always take a donation over the phone if I wish to give that way.
- It is really clear how to contact you by email or phone from visiting your website or from any communication you send me.
- Your thank you communications are just wonderful. I love receiving them. They communicate the impact of my support and the progress against your mission. They make me feel part of a story.
- When I can offer help in other ways, you are prompt and considerate in responding.
- If I ever need to complain, or provide feedback, it is really clear how I do so. You are usually able to respond within a reasonable time (say 3-5 working days) and when you cannot, you will provide a holding response.
- If I do need to complain, your response not only deals with my issue it reassures me about your organisation and that you will take on board any learning.
- You encourage feedback on your level of supporter service and quality of donor care.
- The feedback I provide is considered and shared as part of your learning cycle to help improve your level of supporter service.
- You openly share how you are performing against the standards you set and communicate what feedback you receive, and what steps you are taking to constantly improve.
- I can choose what frequency and what type of communications I receive.
- I can change the frequency and type of communications I receive.
- If I ask you to stop receiving communications then it is instigated immediately.
- You always give me the choice to change how and when you contact me each time you communicate with me.
- Whenever I meet or speak to staff, they inspire me to continue my support.

Thanks to the following for their input and contributions:

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