



Making it easy for donors to engage across all channels

Project 11. Communication with individual donors

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For senior management and trustee boards, this project will:

- Summarise the 10 major themes that emerge from across all the project 11 reports.
- Explain the benefits of having an integrated approach to fundraising that is based on the needs of the donor and not internal departments.

For donors, this project will:

- Improve the quality, timing and relevance of communications they receive from fundraisers.
- Reassure donors that their data is handled legally and sensitively.

Overview

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

Project 11 comprises 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 11a.4) that has typified much of individual giving recruitment in recent years.

To do this, it is important that 'Trustees should take responsibility for setting the charity's' culture by putting donors at the heart of the organisation's thinking and engaging in the donor programme' (project 11d, page 11.5). Furthermore, 'long-term investment and ambassadorial support are critical' from trustees (project 11d, page 11d.5).

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 11e.3).

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 long-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 11c.4) and to use surveys on your website to guide understanding of donors' needs.

Similarly, the community project advises, 'Understanding the motivations of a volunteer, funder or 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 11d.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 11e.4).

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.

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 11d.5, '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 this is contained within data files that are used for follow-up activity, e.g. thank you or follow-up letters' (11e, page 11e.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 programme with a face-to-face programme can prove valuable to the donor

and the charity. It helps to place the relationship on a firm foundation, and it makes sure that the ongoing supporter journey is one that the supporter wants.’ (11f, page 11f.7).

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 11c.4). 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 to 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 and 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 charity’s existence: supporters’ (11d, page 11d.5).

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 (11f, page 11f.6).

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, page 11b.4, on direct mail. Many other reports highlight the importance of emotion and the use of storytelling to deliver that emotion, but none state it 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 as well.

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 11c.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.’

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 projects 11b and 11f 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, 70 years after the D-Day landings. There’s also the piece of string that connects a child of four undergoing radio-therapy, when his mother has to be on the other side of a lead door. A tug from each encourages both and the child remains still throughout the treatment.’ (11b, page 11b.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.’

Additionally, we should 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.’

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

8. Design, usability, copy-writing and readability

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

11b has a checklist for both writing and designing appeal letters. There is no point writing a great appeal if the design 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 to improve, as the following example shows: ‘One example comes from the JDRE. 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.’

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, this is almost a given. However, many 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. 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 11d.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 11e.3).

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, page 11a.4) 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.’

Telephone fundraising is also relies 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 11e.3).

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