More Strategic Group

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Today…

1. **Donor Love:**   The Why of Engagement and Loyalty
2. **Audience:**   Who, What, Where of Digital (Thanks Fi McFee)
3. **Tribes:**   How to build them
4. **Empathy:**   Understand their world
5. **Journeys:**   Identify the moments that matter
6. **Case studies:**   Bringing it all together

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Sharing the love

People love giving

Donor Love - protect your base in Covid

Wellbeing involves three essential characteristics:

- **autonomy –** a sense of control

- **connectedness** – the quantity and quality of relationships

- **competence** – effectiveness

"The more autonomous, connected, and competent people feel, the greater sense of personal wellbeing they will feel. Conversely, when people feel those qualities eroding, they will feel a decline in wellbeing"

"It is 3x more expensive to acquire a new donor than it is to retain an existing one"

Your Potential Online Audience
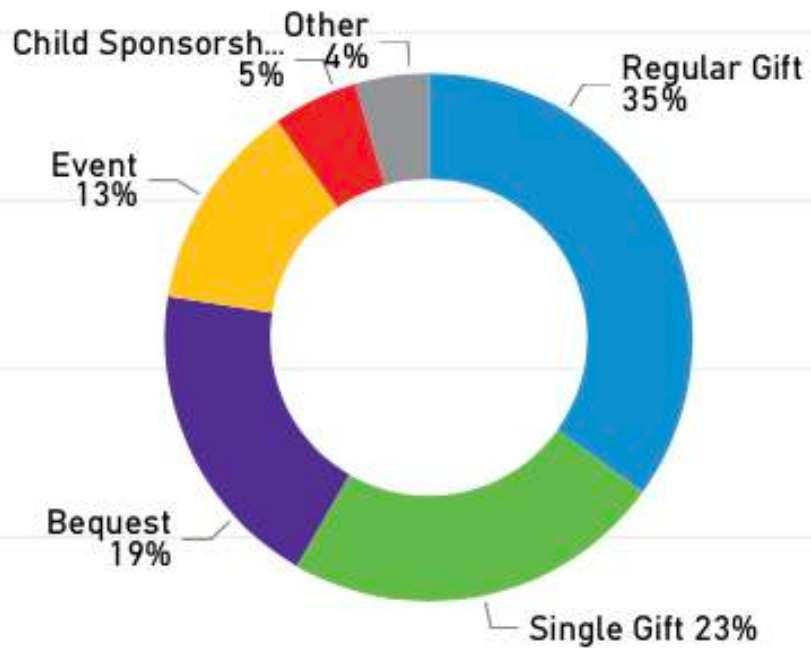
MYTHS AND TRUTHS ABOUT WHO GIVES AND WHO INTERACTS WITH CHARITIES ONLINE

Fiona McPhee

FUNDRAISING STRATEGIST & COACH

Benchmarking
2020

Child Sponsorsh... 5%
Other 4%
Regular Gift 35%
Event 13%
Bequest 19%
Single Gift 23%

ive

Donors by Age and Gift Type

● Child Sponsorship ● Event ● Regular Gift ● Single Gift

Income by Year and Channel

● Digital

Year	Income
2012	$26M
2013	$34M
2014	$37M
2015	$57M
2016	$55M
2017	$70M
2018	$71M
2019	$84M

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Digital Giving by Generation
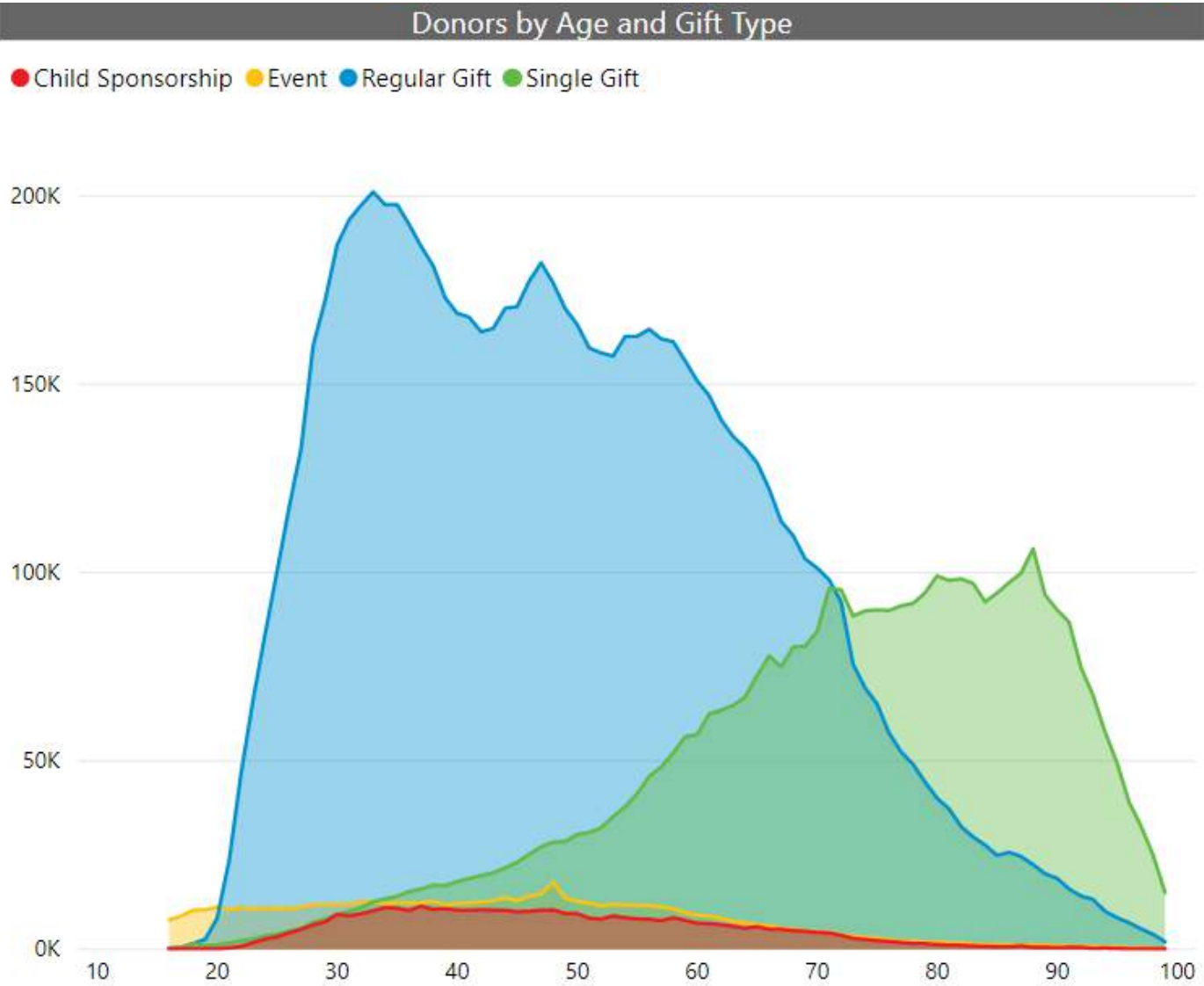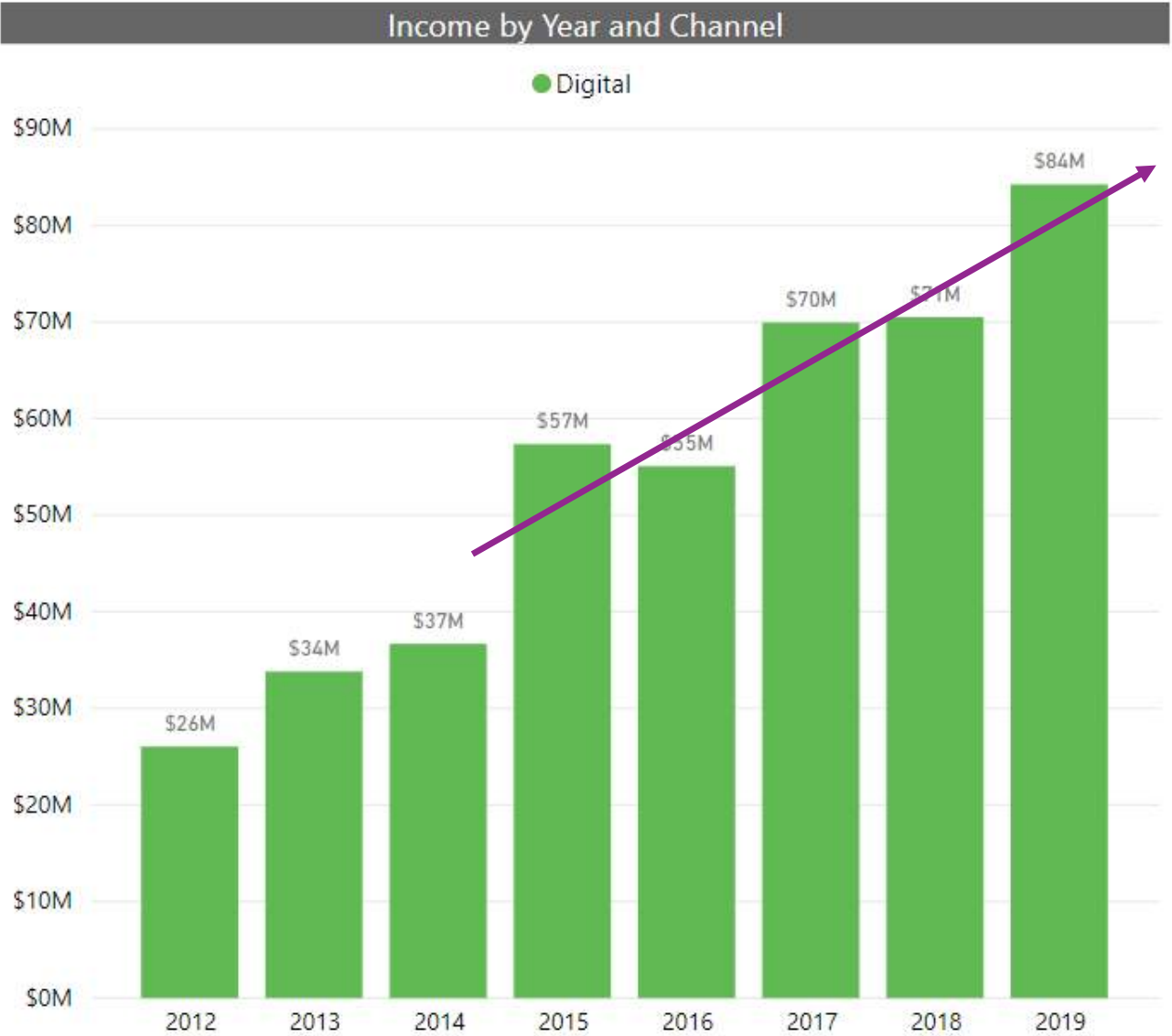
Income by Generation
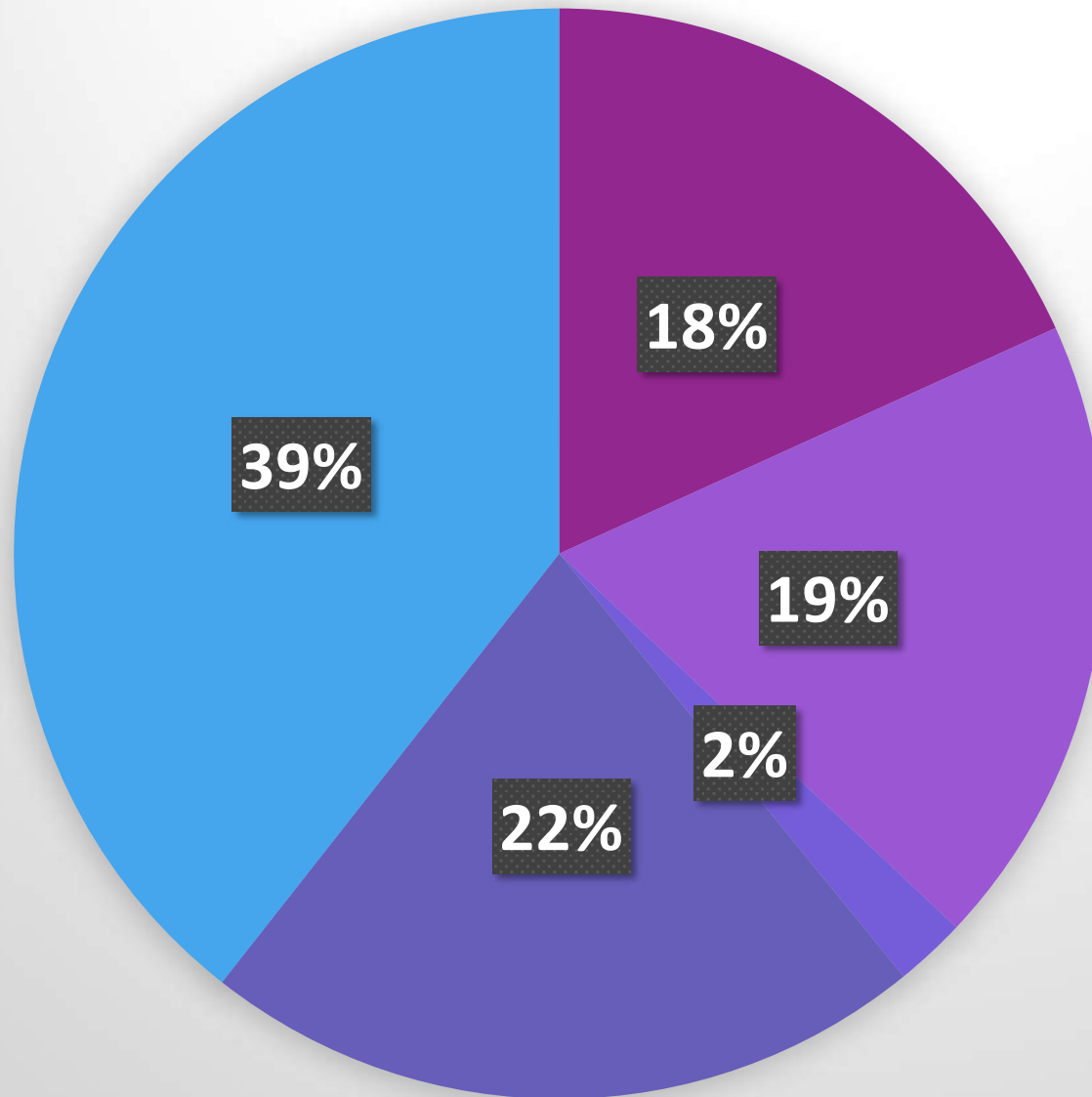
● Child Sponsorship ● Event ● Other ● Regular Gift ● Single Gift

	a. Gen Z	b. Gen Y	c. Gen X	d. Baby Boomers	e. Builders	Other
Single Gift		$0.6M	$0.9M	$3.1M	$1.3M	
Regular Gift		$1.9M	$1.7M	$2.8M	$0.6M	
Child Sponsorship		$0.8M	$0.7M			
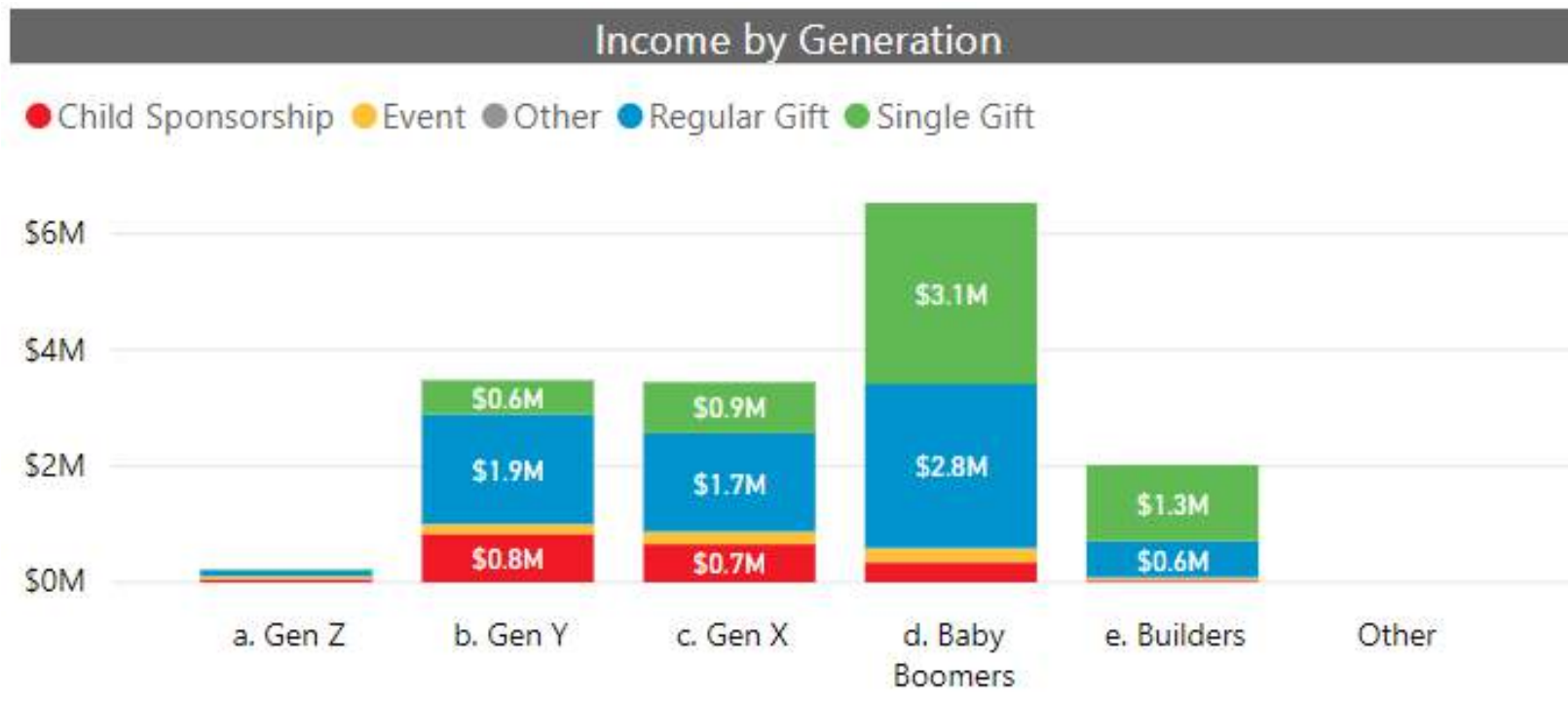
People are going to our sites more
They are doing so more on mobile than before
Income is being generated along the usual giving lines – tax and Christmas peaks
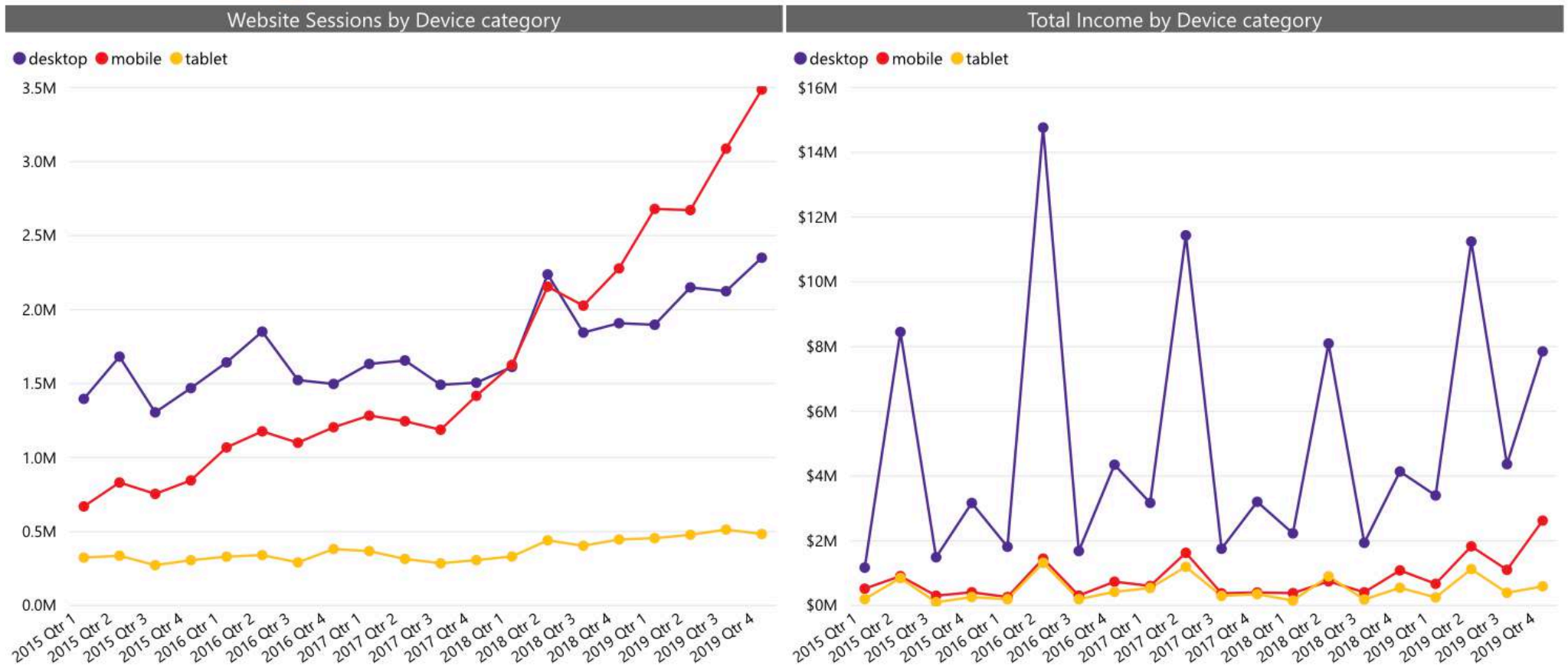
ive

Visitors are spending less than 2 minutes on our sites.
They do this during the week, in the middle of the day.

ive

Average Session Duration by Device category

● desktop ● mobile ● tablet

Sessions by Hour and Day
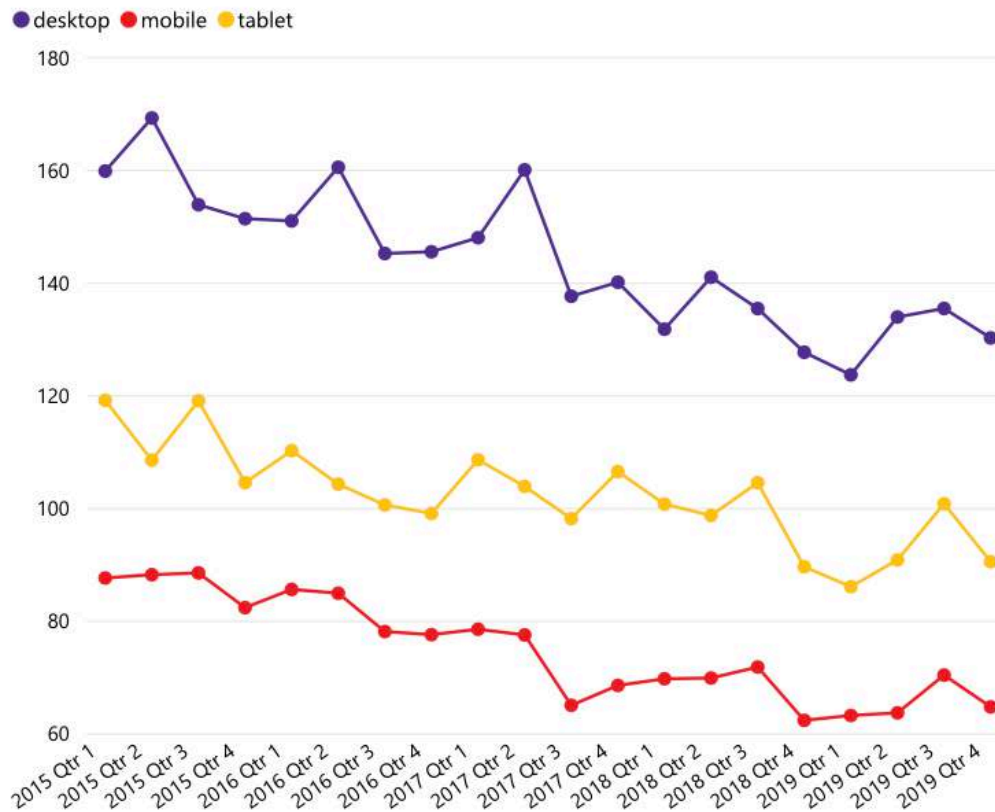
● 1. Monday ● 2. Tuesday ● 3. Wednesday ● 4. Thursday ● 5. Friday ● 6. Saturday ● 7. Sunday
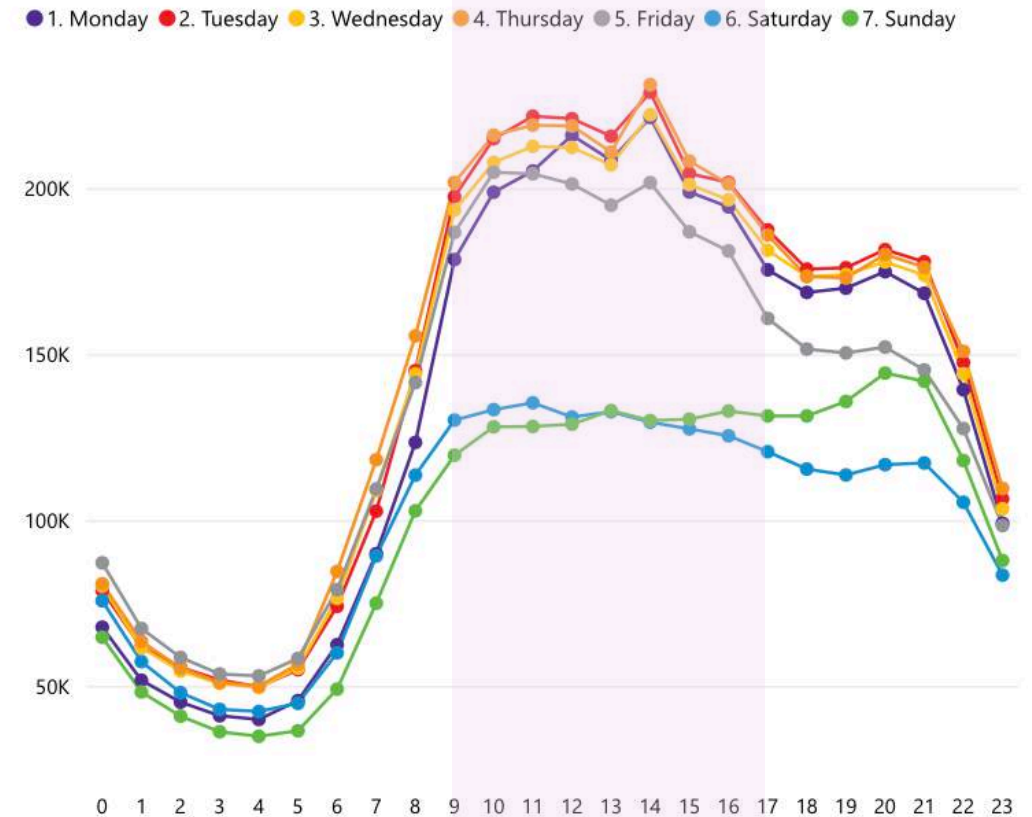
Younger more vulnerable to declines
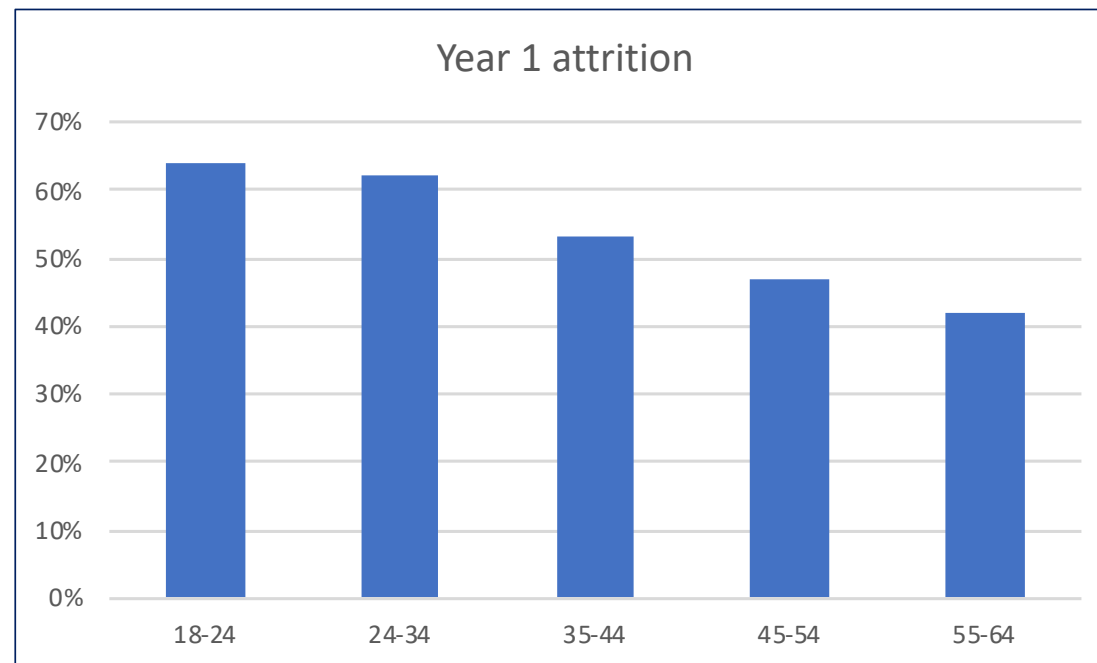
Year 1 attrition

Year 1 attrition by age is sharply higher for under 35's

Online behaviour

➢Whilst mobile has more activity **giving is done on desktops at a higher rate**

➢Visitors are spending less than 2 minutes on our sites

➢They do this during the week, in the middle of the day

➢The younger the visitor the longer they spend on site

➢**The older the visitor the more likely they are to give**

➢**People give more via desktop,** giving whilst they are at work

Online Givers are:

➢ Women and Men, but more women

➢ Older, think Gen X and above

➢ The younger are more likely to be Peer to Peer and campaigners than older donors

Where the digital giving audiences are

Social (Facebook) is good for lead generation & conversations

➢ Remember the audience is in control here not your organisation

➢ You can set up to receive donations on Facebook but remember it is about:

  ➢ Audience and motivation to give … are they there to give?

  ➢ Overall revenue contribution is low … BUT it can be a great lead generator

  ➢ A relationship is unlikely to be sustained through Facebook alone

What about ...

Ask yourself - do I already have an audience there? Why? And are they a potential giving or lead audience?

If the answer is no – it's a distraction

Where the digital giving audiences are

SMS & Mobile

➢ SMS can be effective for engagement, and opening up for conversation

➢ SMS is driving some response, from an engaged audience

➢ Messenger / What's App groups can help create community and engagement

Where the digital giving audiences are

Email can drive donations if:

➢You have people's email addresses

➢You have permission to email them

➢People open your emails & they are relevant to them

➢Your website / donation environment is good

Emails can help with engagement (help with retention and stewardship) if the same things are true!

Measuring engagement

Net Endorser Score (NES)
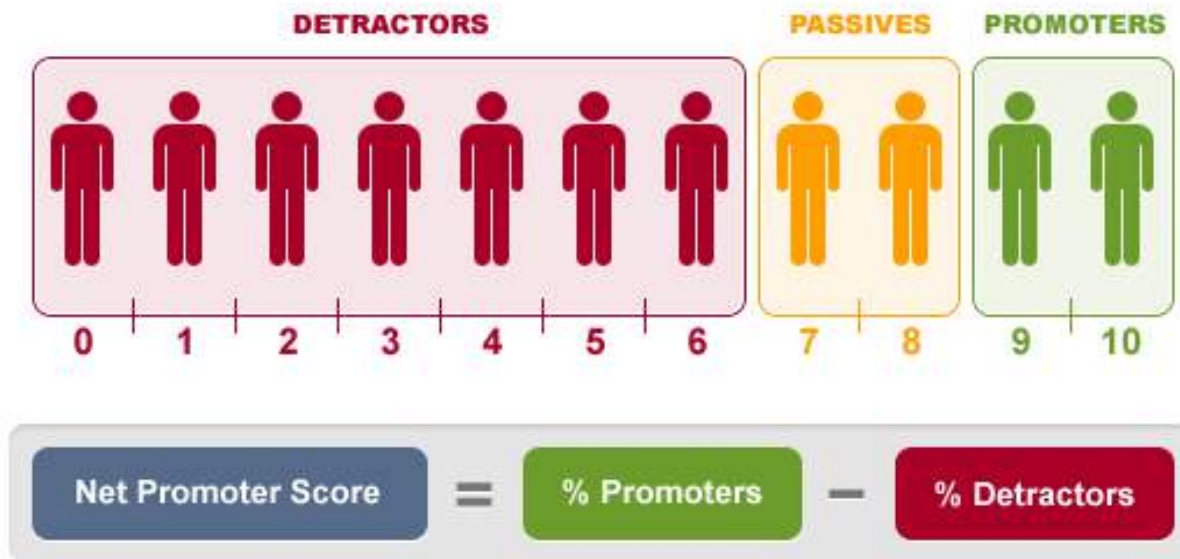
Q2.1: If a friend was looking to make a donation to an organisation and asked for your advice, how likely would you be to recommend XXXX

NES – relative to other charities

Question: If a friend was looking to make a donation to an organisation and asked for your advice, how likely would you be to recommend A-J?

Comparative NES

A: 78%
B: 43%
C: 33%
D: 49%
E: 58%
F: 52%
G: 19%
H: 15%
I: 43%
J: 39%
K: 56%
TOTAL AVG: 43%

■ A ■ B ■ C ■ D ■ E ■ F ■ G ■ H ■ I ■ J ■ K ■ TOTAL AVG
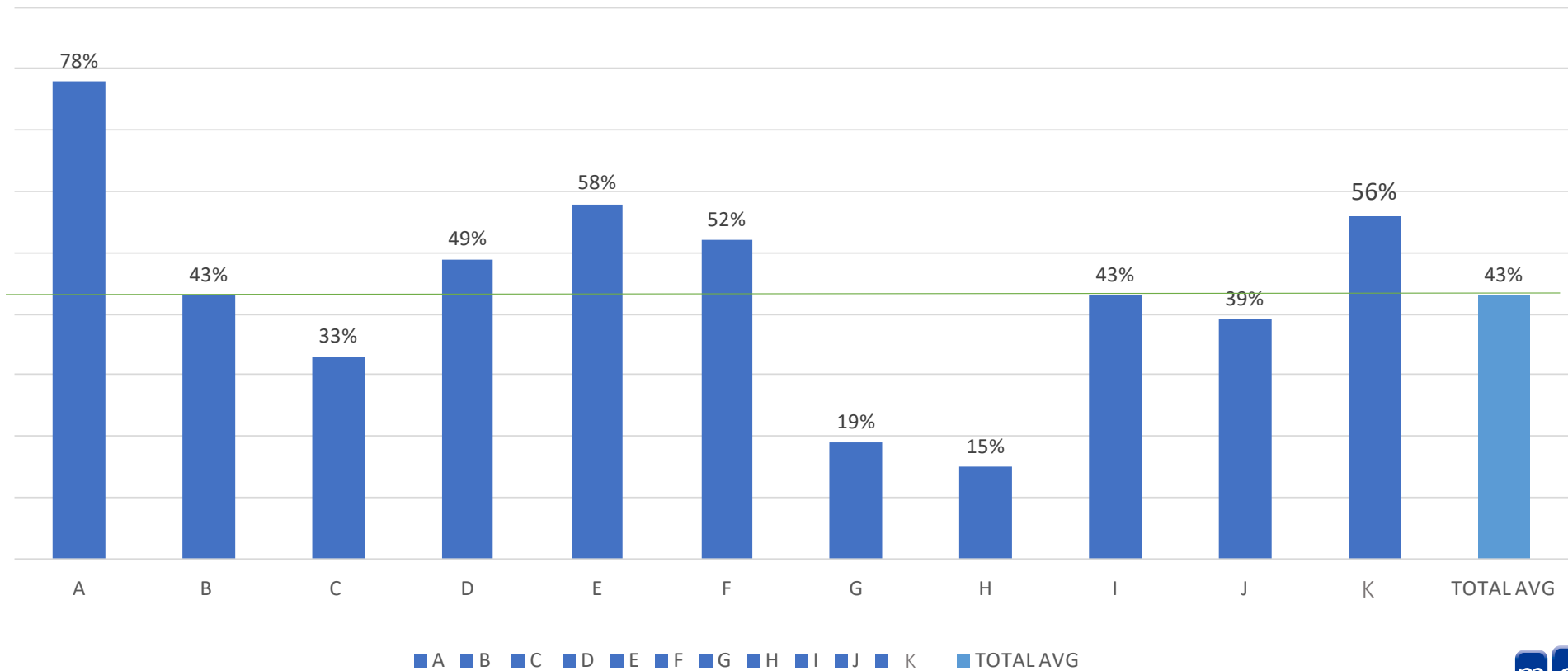
NES – drivers of a high score

They are the most important cause I support

I am very satisfied with how they treat me

Enjoyable or Interesting to Read

I make decisions with my head : I make decisions with my heart

How can you use this?

Step 1
Sign up

Step 2
Email

Step 3
Survey
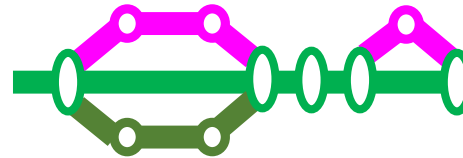
Step 4
Diverge

Step 5
Analyse

Commitment

High

Low

Detractor

Promoter

Satisfaction (experience)

Answering the survey shows higher quality

Retention period	1 month	3 month	6 month
Responded	81.60%	64%	50.10%
Did not respond	74.40%	56.10%	43.50%

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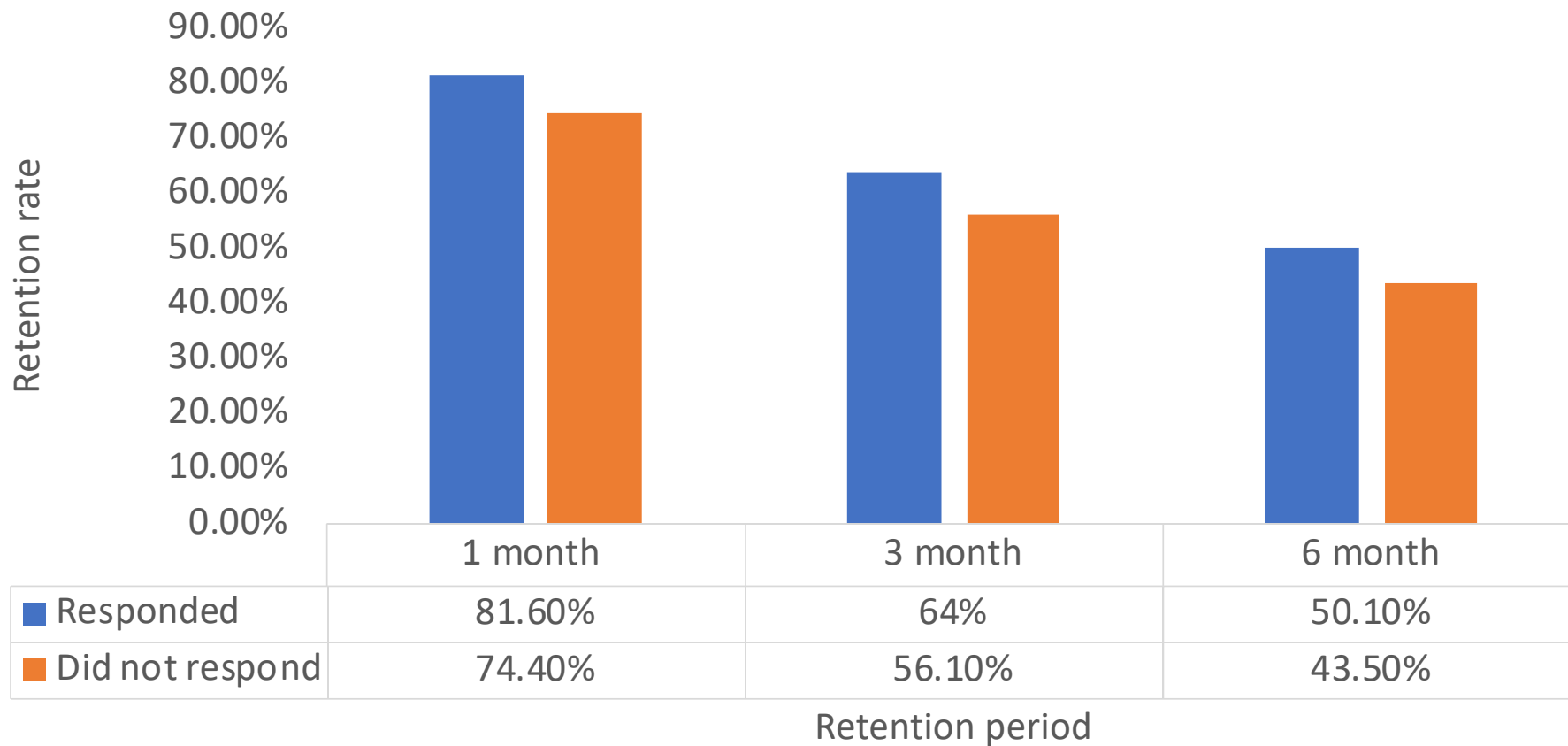
Segment is highly predictive

	1 month	3 month	6 months	12 months
■ Champion	82.50%	67.50%	52.80%	39.60%
■ Charmed	82%	60.00%	44.70%	31.90%
■ Disaponted/Doubtful	72.80%	45.10%	34.90%	27.00%

Retention rate

Retention period
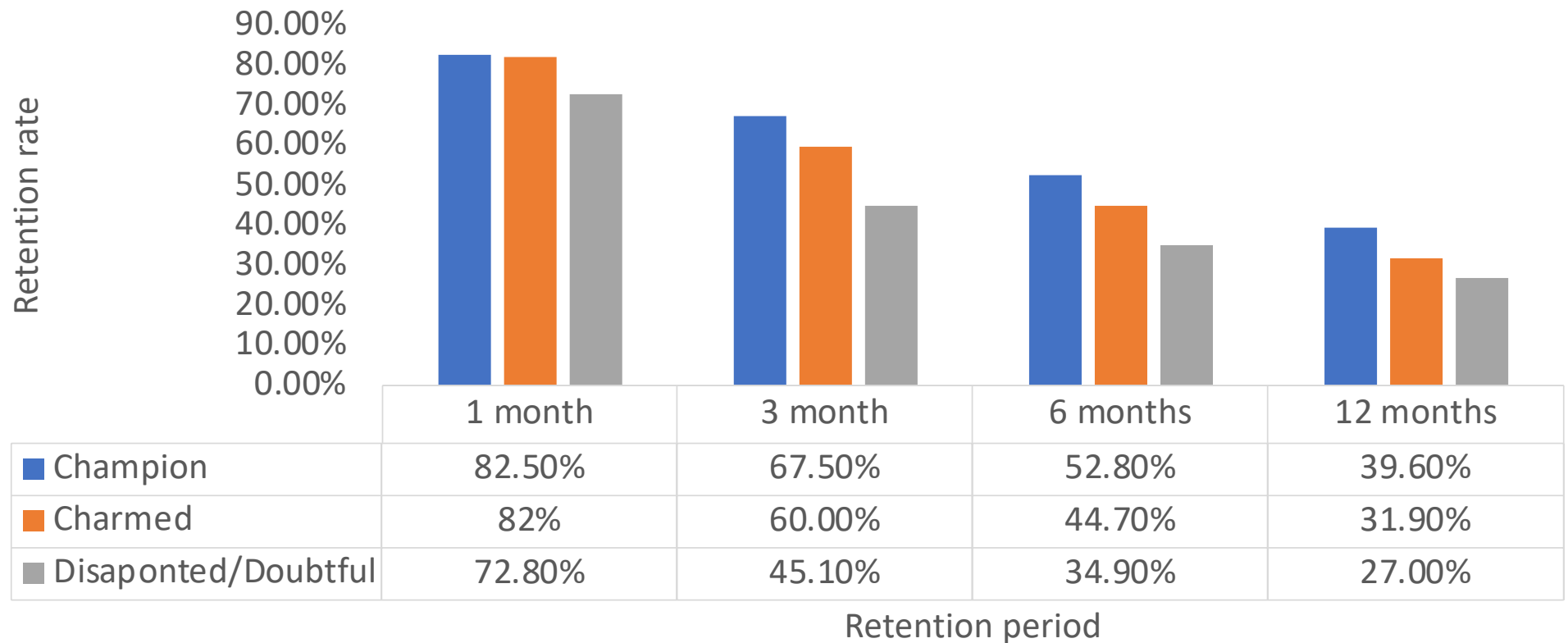
What are the drivers of loyalty and value?

Commitment

The **passion** that a donor feels for the cause or goal of the charity. To score highly on this they have to know **what your goal is**, they need to be **emotionally connected to it** and it needs to be **a goal that's important to them.**

Satisfaction

The way of measuring **how they feel that you treat them** as a donor. Do you thank them well, do you speak in a tone of voice that makes them feel valued and do you understand why they give and communicate accordingly?

Trust

The belief that **you behave in the way that they would expect you to**. In particular, it asks whether they **trust you to spend their money well.**

https://www.institute-of-fundraising.org.uk/blog/why-supporter-loyalty-matters/
https://www.about-loyalty.com

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The principles
of building your
'community'
tribe

Understand your community characteristics

DOER - Raise funds, support through knowledge sharing (existing members and newbies)

THINKERS – Provide fun & a creative input (will contribute new fundraising ideas)

TALKER – Share and interact (comment and share)

Segments for acquisition

DOER

Show case your current DOERS

THINKER

Potential supporters invited to THINK about fundraising ideas they could do

TALKER

Get your active supporters to TALK about fundraising ideas

DOER

= More DOERS holding fundraisers

Increases donors
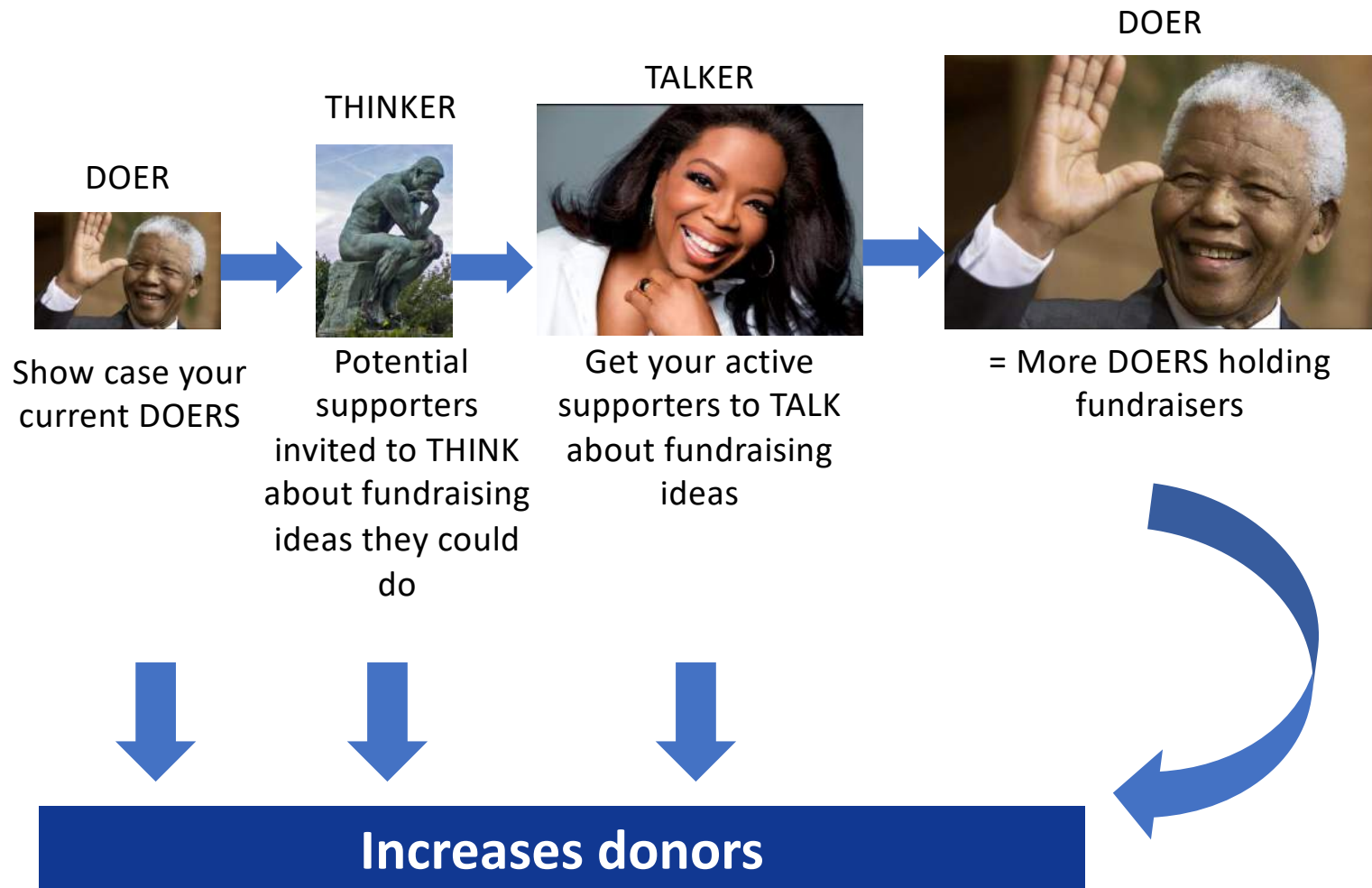
Build your tribe to retain them

DYT COMMUNITY

Interact with

Newby DOERS

Provide idea & inspire

Promote ideas & build energy
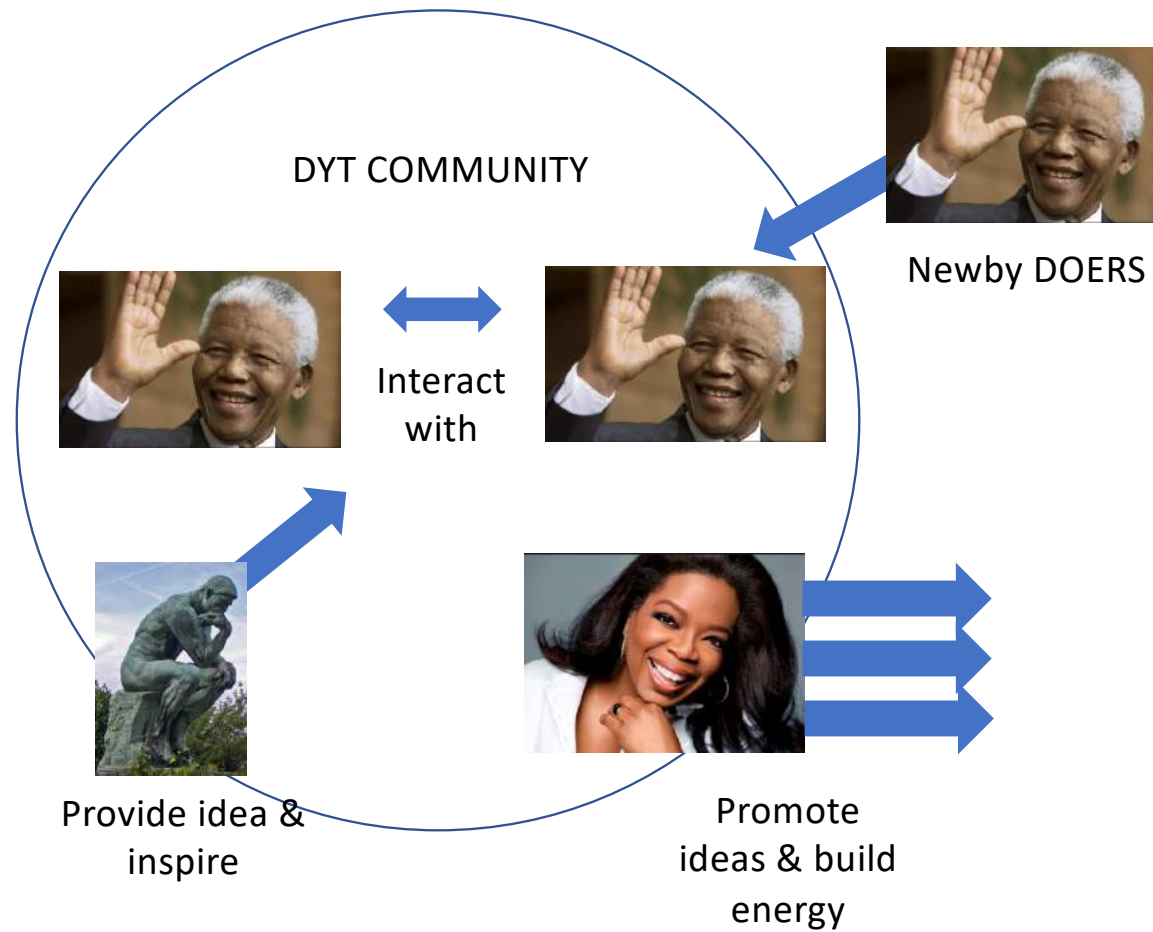
Who to target - the role of empathy

What can we find out?

- Data analysis - R F V
- Demographics
- Lookalike data from social
- Observe and Listen in
- Mini Survey - in thank you?
- Talk to them (or people you know like them)

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What does he
THINK AND FEEL?

what really counts

major preoccupations

worries & aspirations
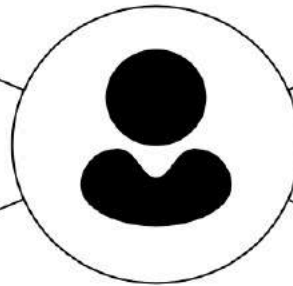
What does he
HEAR?

what friends say

what boss say

what influencers say

What does he
SEE?

environment

friends

what the market offers

What does he
SAY AND DO?

attitude in public

appearance

behavior towards others

PAIN

fears

frustrations

obstacles

GAIN

"wants" / needs

measures of success

obstacles

Empathy Map courtesy of
www.eventmodelgeneration.com
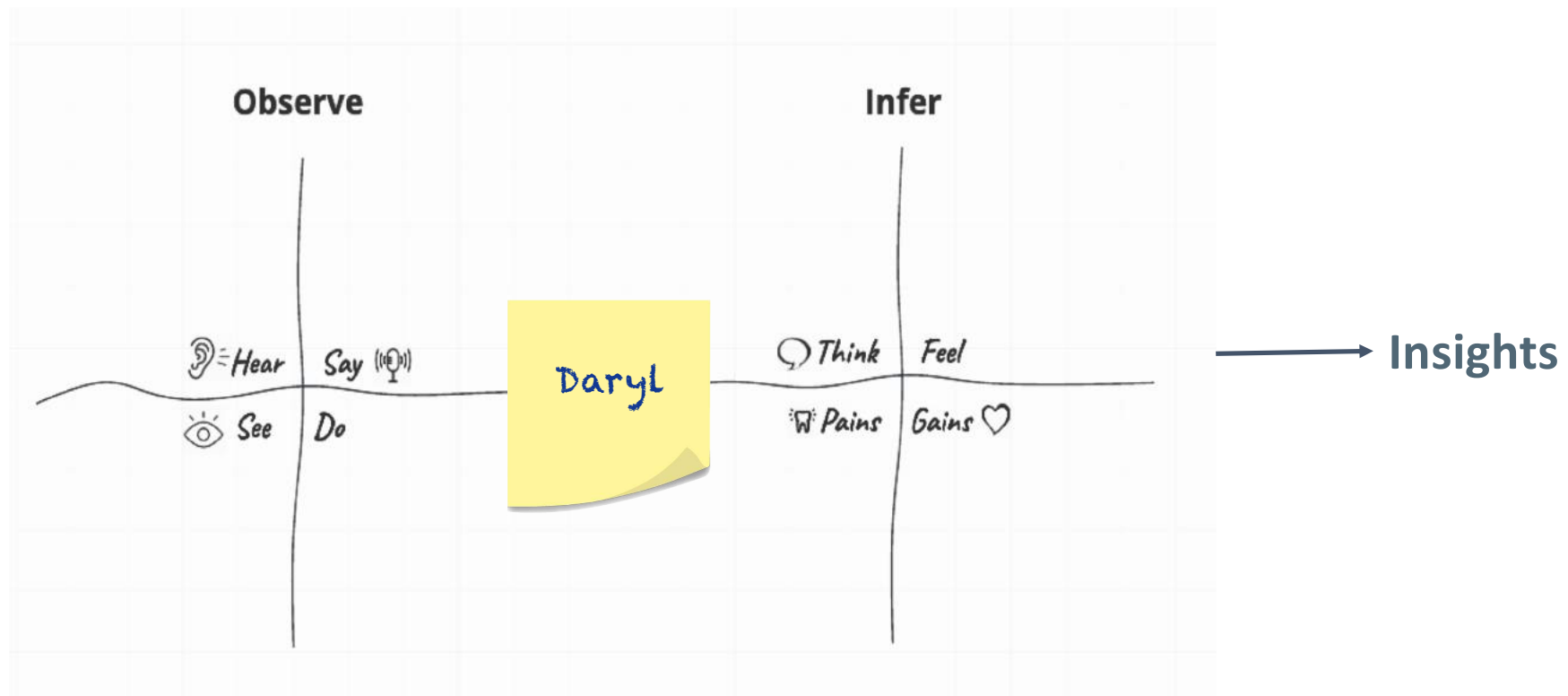
Daryl - young socialite

- Age: 24
- Work: First job in an office
- Family: Flat shares and his sister lives nearby
- Education: Grad
- Location: Newtown
- Interests: Gym, sports viewing with mates and going out

Looking to make a name at work and enjoys socializing – takes part in events such as the City to Surf primarily for fitness and takes part in challenge events for the experience

Will support a charity through peer-to-peer as part of that as thinks it is good for his profile.

He sees his sister quite frequently, and he isn't convinced about the way her new partner treats her. The other day she explained away some bruising in an odd way - which supports his suspicions. He doesn't know what to do about it.

Observe

Infer

~ Hear   Say

Think   Feel

See   Do

Pains   Gains
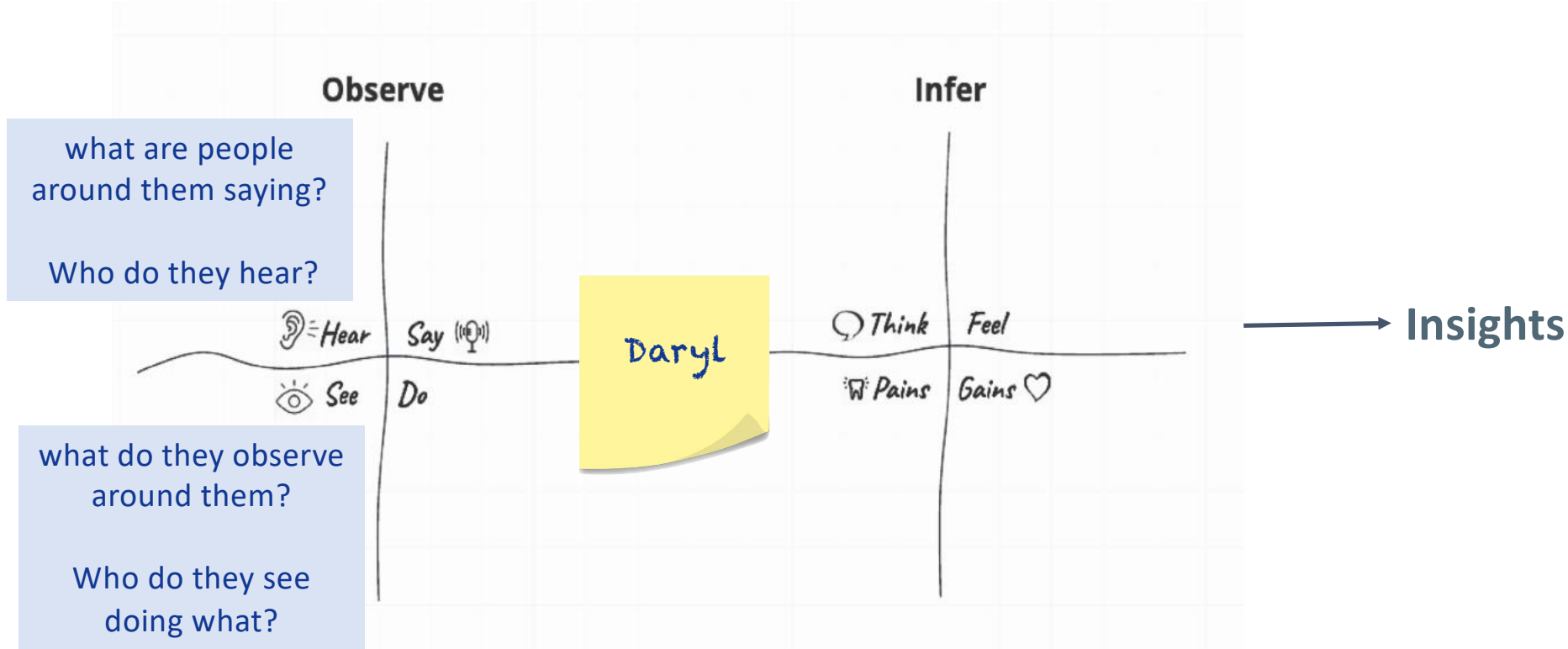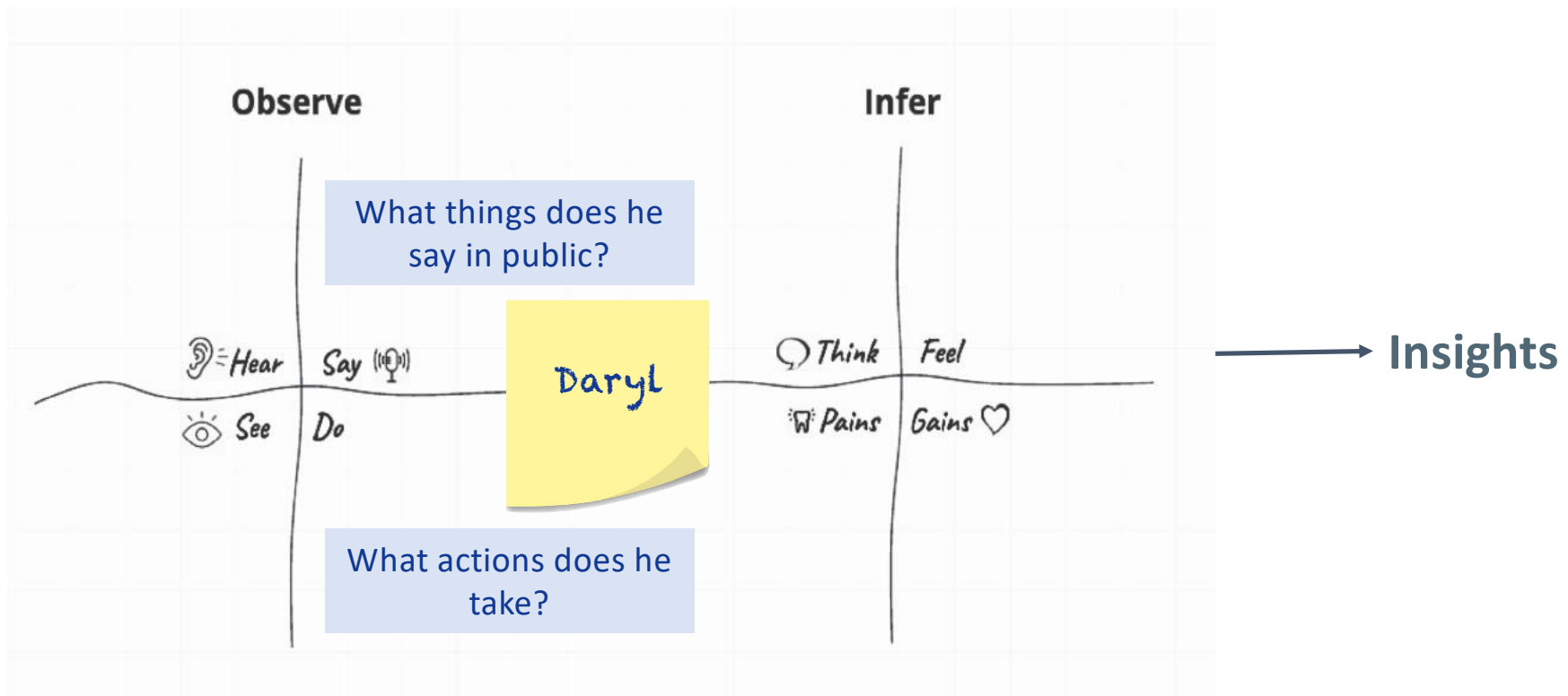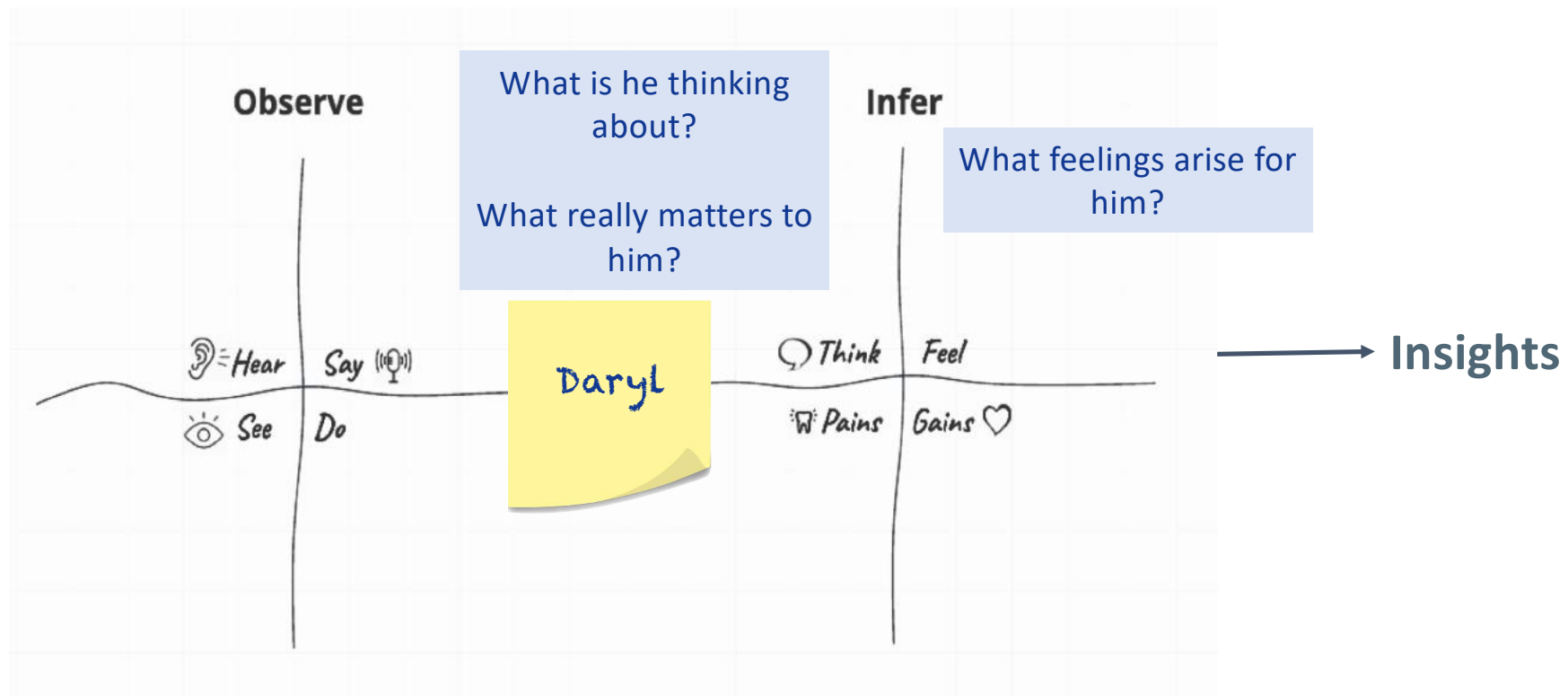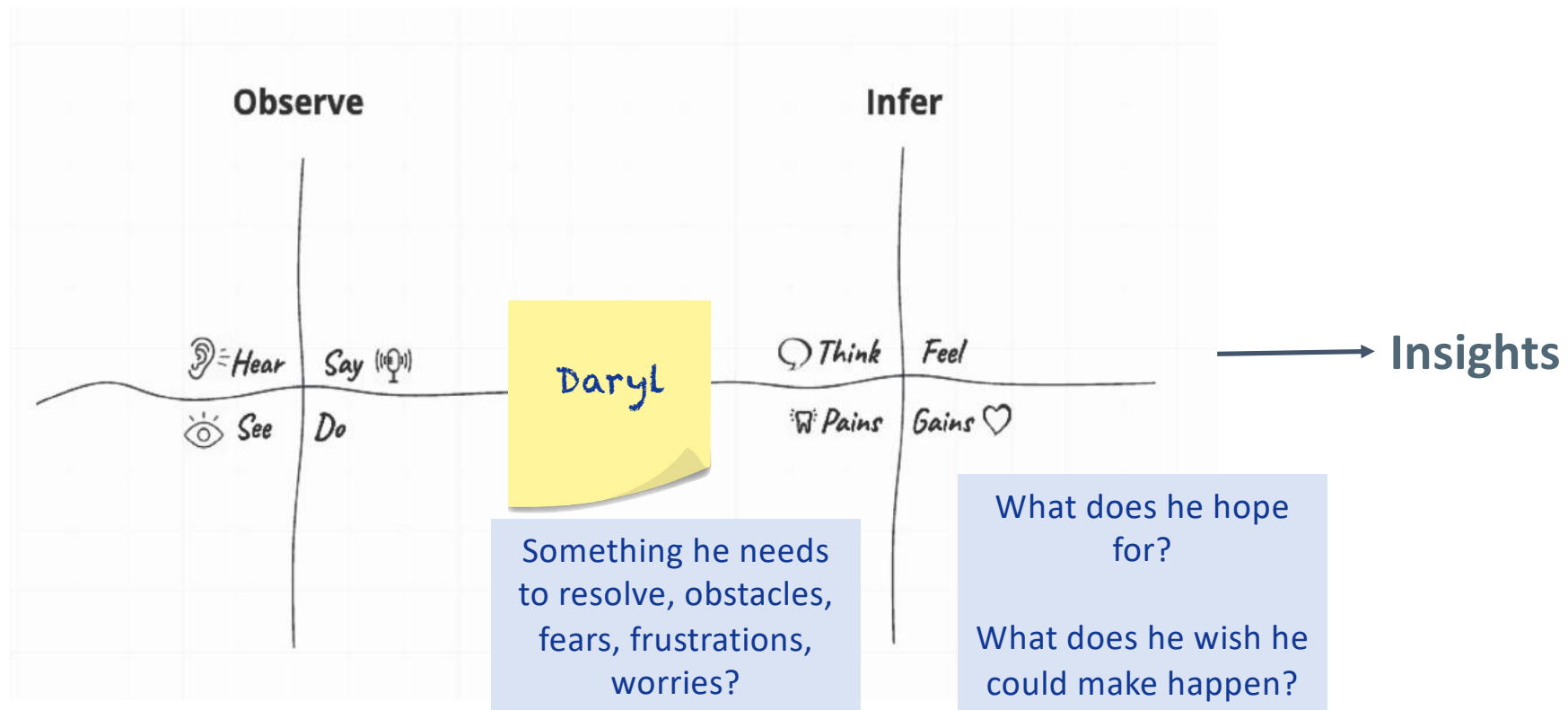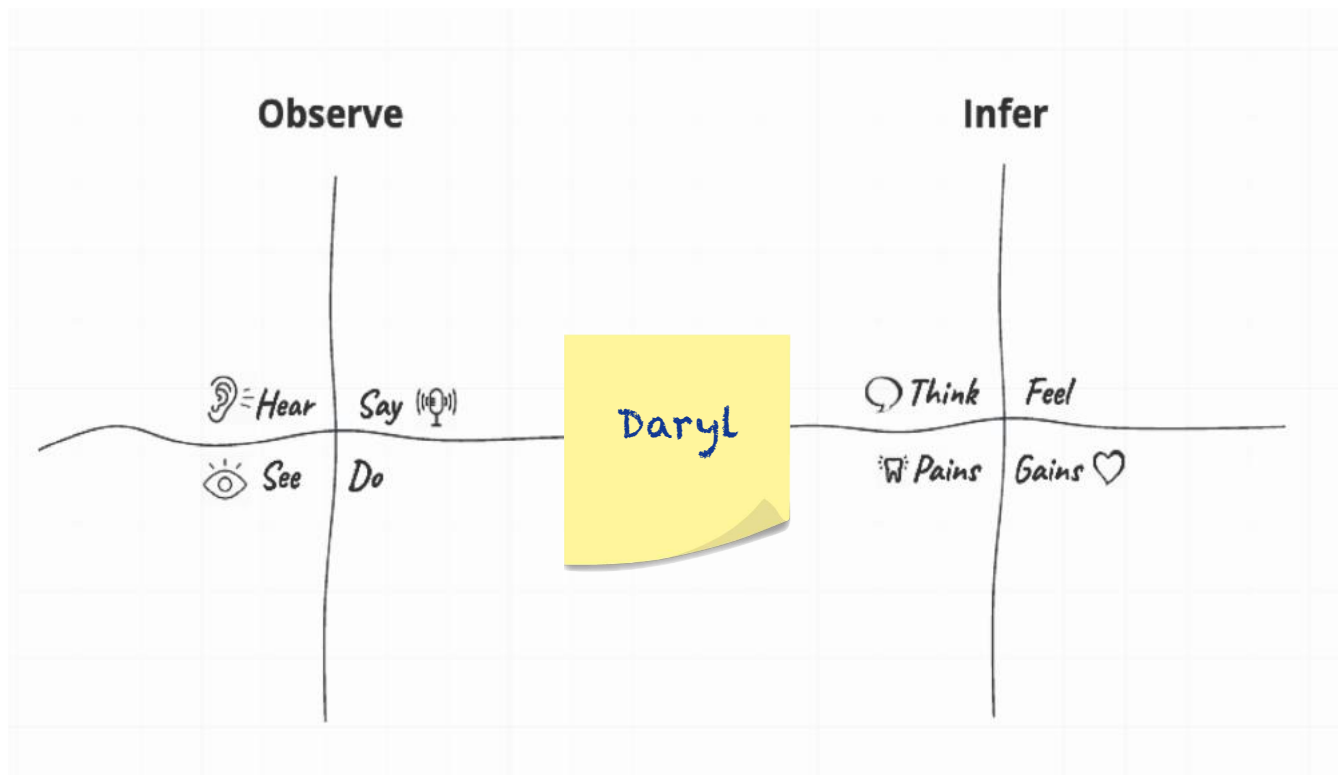
Daryl

We can help Daryl if we offer him…

We also need to make it (simple, fun, engaging)

Insights

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St John NZ personas

We identified 8 different types of personas.

We were then able to overlap RFV onto the personas.

Lifelong Supporter

The St John Advocate
Extroverted life-long 'promoter'

The St John Strong
Inner directed life-long donor with broader connection to St John

Shared Supporter

The Good Giver
St John one of many worthy causes they support

The Good Doer
Likes to give their time

Member Plus

The Local Member
By being a member they also believe it has a local benefit

The NZ Member
By being a member they believe they also "help out NZ"

Service User

The Covered Customer
Being a member covers them and their loved ones

The Tipping Patient
Have experienced the service recently

November 2017

Journey map: Identify the moments that matter…

A great combo

GE Optima MR360

Doug Deitz

Sofia

Age 6½

{ The Experience }

Journey Mapping Sofia's Experience

SOFIA

ATTITUDES			I'M REALLY NERVOUS	THAT LOOKS SCARY!	WILL IT HURT ME?!	MUM CAN'T HELP?	NO! NO! PLEASE NO!

BEHAVIOURS		...	CHECKS IN	WALKS TO MRI ROOM	SEES MRI MACHINE	CRIES & RESISTS	...	SEES DOCTOR ENTER	GETS DRUGGED	GOES THROUGH MRI

ON STAGE EXPERIENCE

PEOPLE			CHECKIN NURSE	IMAGING TECH	MUM	NURSE	DOCTOR ANESTH.	IMAGING TECH

THINGS			DESK & COMPUT.	CHART		MRI MACHINE	TISSUES	NEEDLE & DRUGS	MRI MACHINE

BACK STAGE SUPPORT

PEOPLE		IT'L MGR	SYSTEM ADMIN.	DOUG	PATIENT SAFETY TEAM	IMAGING TECH

THINGS			PATIENT RECORD SYSTEM	STAFF PAGING SYSTEM	DRUG ROOM	IMAGING RECORD SYSTEM

SOFIA

AM I REALLY SICK?	WISH I WAS AT SCHOOL ●	I'M REALLY NERVOUS ●	THAT LOOKS SCARY!	WILL IT HURT ME?! ●	MUM CAN'T HELP?	NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR	…	RIDES TO HOSPIT'L	…	CHECKS IN	WALKS TO MRI ROOM	SEES MRI MACHINE	CRIES & RESISTS	…	SEES DOCTOR ENTER	GETS DRUGGED	GOES THROUGH MRI

DOCTOR	MOM	CHECKIN NURSE	IMAGING TECH	MUM	NURSE	DOCTOR ANESTH.	IMAGING TECH

TAKE-HOME PACKET	CAR	DESK & COMPUT.	CHART	MRI MACHINE	TISSUES	NEEDLE & DRUGS	MRI MACHINE

TECH. WRITER	HOSPIT'L BLDG MGR	SYSTEM ADMIN	DOUG	PATIENT SAFETY TEAM	IMAGING TECH

RESERV. SYSTEM		PATIENT RECORD SYSTEM	PAGING SYSTEM	DRUG ROOM	IMAGING RECORD SYSTEM

EVALUATE & PRIORITIZE

Identify moments that matter for the customer and the organization

SOFIA

AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

THAT LOOKS SCARY!

WILL IT HURT ME?!

MUM CAN'T HELP?

NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR

...

RIDES TO HOSPIT'L

...

CHECKS IN

WALKS TO MRI ROOM

SEES MRI MACHINE

CRIES & RESISTS

...

SEES DOCTOR ENTER

GETS DRUGGED

GOES THROUGH MRI

DOCTOR

MOM

IMPACT

NURSE

TECH

IMAGING TIME

MORE STAFF

COST OF DRUGS

SIDE EFFECTS

IMAGING TECH

TAKE-HOME PACKET

CAR

DESK & COMPUT.

CHART

MRI MACHINE

TISSUES

NEEDLE & DRUGS

MRI MACHINE

TECH. WRITER

HOSPIT'L BLDG MGR

SYSTEM ADMIN

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

RESERV. SYSTEM

PATIENT RECORD SYSTEM

PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM

EVALUATE & PRIORITIZE

Identify moments that matter for the customer and the organization

NEEDS

HAVE SCAN

FEEL SAFE

SOFIA

| AM I REALLY SICK? | WISH I WAS AT SCHOOL | I'M REALLY NERVOUS | THAT LOOKS SCARY! | WILL IT HURT ME?! | MUM CAN'T HELP? | NO! NO! PLEASE NO! |

| GOES TO INITIAL DOCTOR | ... | RIDES TO HOSPIT'L | ... | CHECKS IN | WALKS TO MRI ROOM | SEES MRI MACHINE | CRIES & RESISTS | ... | SEES DOCTOR ENTER | GETS DRUGGED | GOES THROUGH MRI |

| DOCTOR | MUM | CHECKIN NURSE | IMAGING TECH | MUM | NURSE | DOCTOR ANESTH. | IMAGING TECH |

| TAKE-HOME PACKET | CAR | DESK & COMPUT. | CHART | MRI MACHINE | TISSUES | NEEDLE & DRUGS | MRI MACHINE |

TECH. WRITER | HOSPIT'L BLDG MGR | SYSTEM ADMIN | DOUG | PATIENT SAFETY TEAM | IMAGING TECH

RESERV. SYSTEM | RECORD SYSTEM | PAGING SYSTEM | DRUG ROOM | IMAGING RECORD SYSTEM

EXPLORE CUSTOMER NEEDS
Gain deeper understanding of functional and emotional needs

SOFIA

EVALUATE & FRAME

Re-examine issue / opportunity based on deep customer understanding

SOFIA

FEEL SAFE

AM I REALLY SICK?

WISH I WAS AT SCHOOL

I'M REALLY NERVOUS

THAT LOOKS SCARY!

WILL IT HURT ME?!

MUM CAN'T HELP?

NO! NO! PLEASE NO!

GOES TO INITIAL DOCTOR

...

RIDES TO HOSPIT'L

...

CHECKS IN

WALKS TO MRI ROOM

SEES MRI MACHINE

CRIES & RESISTS

...

SEES DOCTOR ENTER

GETS DRUGGED

GOES THROUGH MRI

DOCTOR

MUM

CHECKIN NURSE

IMAGING TECH

MUM

NURSE

DOCTOR ANESTH.

IMAGING TECH

TAKE-HOME PACKET

CAR

DESK & COMPUT.

CHART

MRI MACHINE

TISSUES

NEEDLE & DRUGS

MRI MACHINE

IDEA: LET'S GO CAMPING

TECH.

HOSPIT'L BLDG

SYSTEM

DOUG

PATIENT SAFETY TEAM

IMAGING TECH

ALERT. SYSTEM

RECORD SYSTEM

PAGING SYSTEM

DRUG ROOM

IMAGING RECORD SYSTEM

DESIGN NEW EXPERIENCES
Innovate to influence attitudes and change behaviors

TEST NEW EXPERIENCES

New attitudes, new behaviours….different result

SOFIA

ATTITUDES				I'M REALLY NERVOUS	THAT LOOKS SCARY!	WILL IT HURT ME?!	MUM CAN'T HELP?		NO! NO! PLEASE NO!
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ON STAGE EXPERIENCE

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THINGS			PATIENT RECORD SYSTEM		STAFF PAGING SYSTEM	DRUG ROOM		IMAGING RECORD SYSTEM

SOFIA

FEELS

ANXIOUS   SCARED   TERRIFIED

THINKS

AM I ... WITH ... | I'M REALLY NERVOUS | THAT LOOKS SCARY! | WILL IT HURT ME?! | MUM CAN'T HELP? | NO! NO! PLEASE NO!

BEHAVIOURS

... | CHECKS IN | WALKS TO MRI ROOM | SEES MRI MACHINE | CRIES & RESISTS | ... | SEES DOCTOR ENTER | GETS DRUGGED | GOES THROUGH MRI

ON STAGE EXPERIENCE

PEOPLE

CHECKIN NURSE | IMAGING TECH | MUM | NURSE | DOCTOR ANESTH. | IMAGING TECH

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DESK & COMPUT. | CHART | MRI MACHINE | TISSUES | NEEDLE & DRUGS | MRI MACHINE

BACK STAGE SUPPORT

PEOPLE

IT'L MGR | SYSTEM ADMIN. | DOUG | PATIENT SAFETY TEAM | IMAGING TECH

THINGS

PATIENT RECORD SYSTEM | STAFF PAGING SYSTEM | DRUG ROOM | IMAGING RECORD SYSTEM

SOFIA

FEELS
- ANXIOUS
- SCARED
- TERRIFIED

THINKS
- AM I ... WITH ...
- I'M REALLY NERVOUS
- THAT LOOKS SCARY!
- WILL IT HURT ME?!
- MUM CAN'T HELP?
- NO! NO! PLEASE NO!

BEHAVIOURS
- ...
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- STAFF PAGING SYSTEM
- DRUG ROOM
- IMAGING RECORD SYSTEM

Prioritise the Moments that Matter

OPPORTUNITY

ISSUE

Boom!

Boom!

Wow

Wow

Wow

Wow

Wow

Wow

Wow

Wow

I can help White Ribbon – they helped me

Not sure about her boyfiend

Applying Journeys & Personas

The Challenge

1. Improve completion rate from registration to collection
2. Increase average amount collected
3. Increase retention rate
4. Identify VIPs

Mapped:

- Doorknock Donors
- Doorknock Volunteers
- Doorknock Zone Directors

Volunteer Persona: Donna

- **AGE:** 56
- **OCCUPATION:** Business owner – social media
- **STATUS:** Divorced. Kids left home.
- **EDUCATION:** Online courses
- **LOCATION:** Lives in Sydney (Roseville)

Moment that matters

I've signed up to Doorknock but I've never done this before. Maybe I just won't do it.
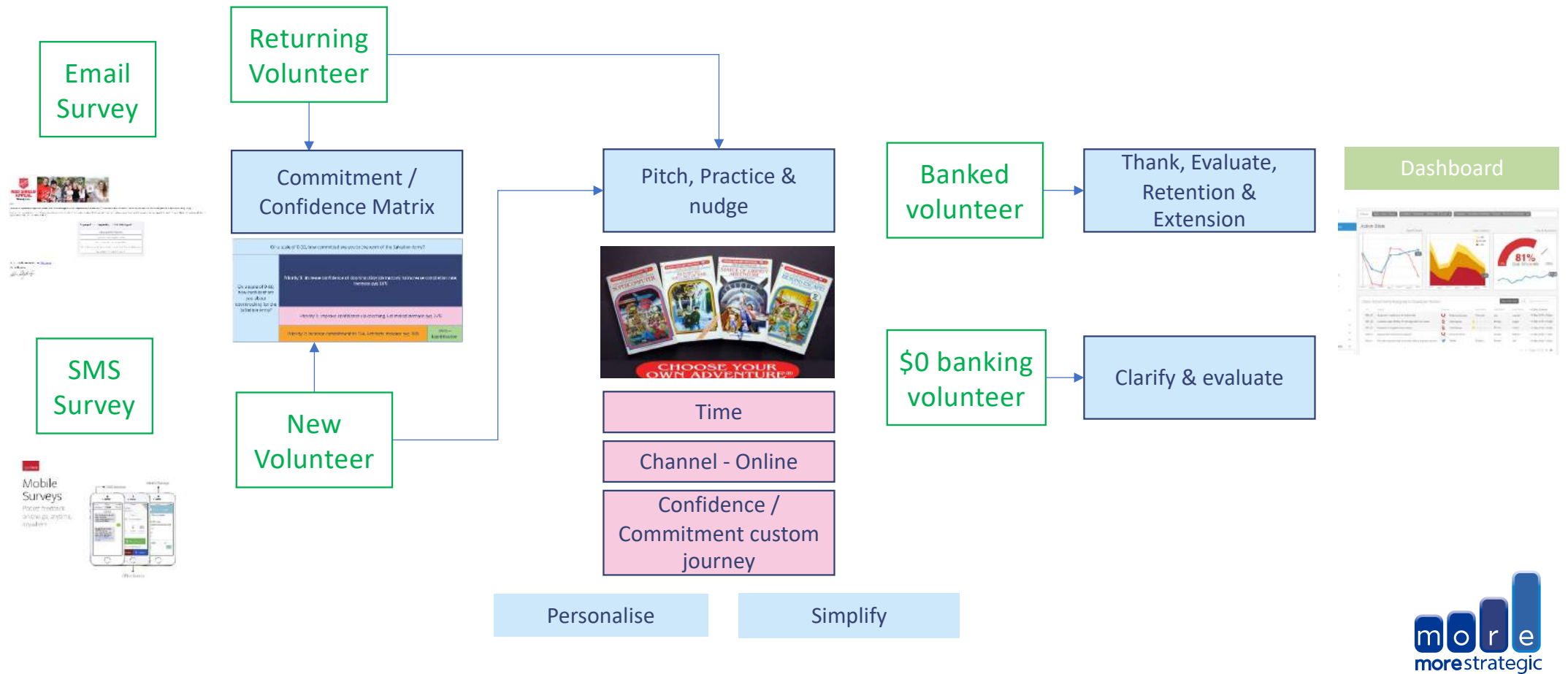
Rational NEED

I now know:
Where to go
What to say
How much to raise

Emotional NEED

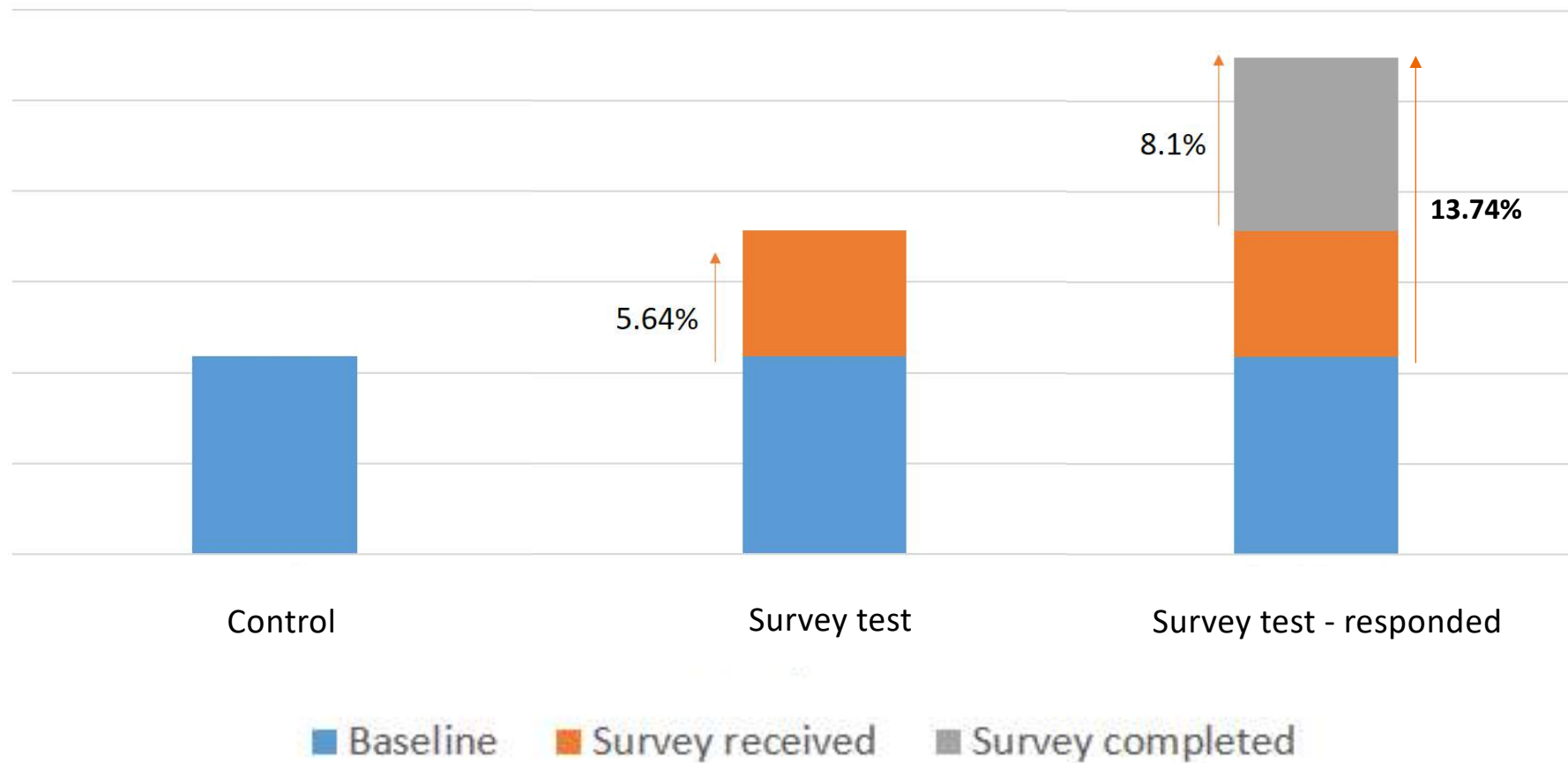I'll be right.
I'm ready.
Let's do it.

Note: Data Analytics underpinned this moment

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The Journey – Volunteers

Email Survey

Returning Volunteer

Commitment / Confidence Matrix

New Volunteer

SMS Survey

Pitch, Practice & nudge

Time

Channel - Online

Confidence / Commitment custom journey

Banked volunteer

Thank, Evaluate, Retention & Extension

$0 banking volunteer

Clarify & evaluate

Dashboard

Personalise   Simplify

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Impact of asking

Increasing value

Established baseline

Please collect from houses on both sides of the street. How long do you estimate it will take you to doorknock your houses?

I don't know

About 30 minutes

About an hour

About two hours or more

Set norm and anchor

RED SHIELD APPEAL
Be a local champion

On average each volunteer contributes 2 hours of their time to collect donations for the Salvation Army's Doorknock. Would you be able to spend a little more time to collect from a few more houses?

Yes

Maybe

No

NEXT

Asked to pre-commit when

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Thank you for offering to collect from some additional houses. We will be back in touch to discuss a suitable location.

Have you decided when you'll collect donations on your street? You can go any time from the 22nd May until the 4th June. Doorknock weekend is the 27-28 May.

Yes

No

25%

Results (thanks Karen Armstrong)

2016

- Telemarketing recruitment of 20,000 volunteers

- 42% of volunteers complete their doorknocking and bank funds

- Retention rate of volunteers was less than 10%

2017

- Reduced volume of recruited volunteers to 14,000

- Increased net return by **5%**

- Increased average raised **15%** comparing control to journey

- Improved completion rates by **14% to 56%** completion

- Increased overall average raised by **21%**

- Increased average raised with 'nudged collectors' by **25%**

- Over **50%** engaged in dialogue
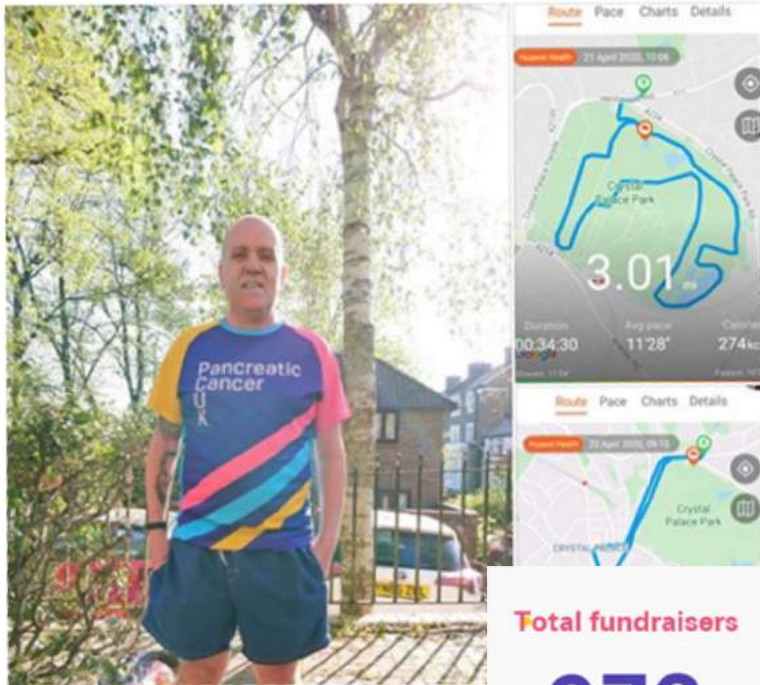
- **ROI 7:1** for coaching journey

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7 secrets to crack digital tribes (thanks Julie Roberts)

1. Understand supporters **motivations** and **needs**

2. **Enrich your data** insights and follow trends that are already occurring

3. **Engage** people differently depending on where they are in the registration pipeline **(talkers, thinkers, doers)**

4. Don't overwhelm them with options – **Focus on top 6 ideas**

5. **Inspire** supporters through stories of other fundraisers

6. **Love your tribe** - support & praise them publicly for others to see

7. **Use personas** to build **empathy maps -** stop thinking like you and create memorable experiences

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Looks like: Fundraising Page → Digital Tribe

Day 2 of the 24 day challenge 💜 I have challenged myself to run 3 miles everyday for the next 24 day's 💜 has anyone else taken the 24 day challenge, and if so what are you doing?
https://fundraise.pancreaticcancer.org.uk/.../3-miles-per-day...

Pancreatic Cancer UK
Published by Aysha najair [?] · 17 April at 17:18 · 🌐

We've seen some really creative fundraising from our supporters during lockdown. Catherine signed up to Challenge 24 after sadly losing her mum to #PancreaticCancer and raised an incredible £1,466.

"I set myself a challenge of walking 20,000 steps for 24 days, keeping the number 24 at the heart of my challenge.

To top it all off – a wonderful surprise awaited me at the finish, with a running track recreated in my back garden by the most important people in my life. I feel bey.... See more

Total fundraisers
978

Raised so far
£184,882

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