



CASE STUDY :: NONPROFIT FOUNDATION

ALIGNING WITH DONOR PRIORITIES INCREASES DONATIONS

Walker helped a nonprofit foundation use donor insights to redefine and better align its fundraising strategy with donor priorities, increasing donations by 33 percent.



WALKER

Recognizing the need to expand its donor base and fundraising efforts, a nonprofit foundation sought to gauge awareness and willingness to support its mission and also to understand donors’ giving priorities.

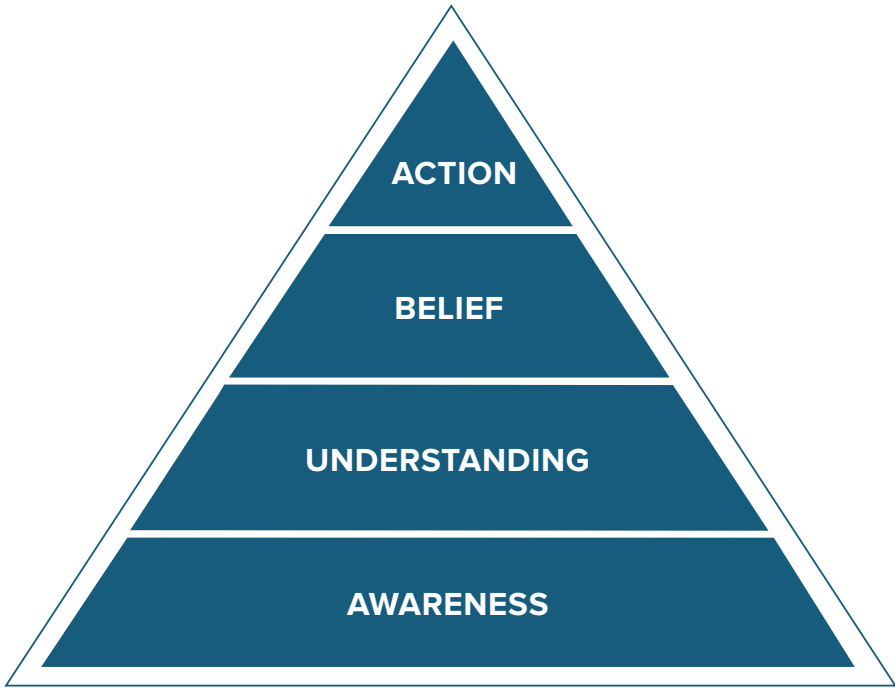
SOLUTION

Hearing from current and potential donors was a critical first step for updating the foundation’s fundraising strategy and process. Working with Walker, the team designed an assessment to be sent to all current donors, prospective donors and other key stakeholders. From this, they were able to learn about awareness and understanding of the mission, the motivation for giving and the giving priorities.

The donor feedback provided insights for the fundraising strategy, ultimately affecting the communication plan, marketing segmentation and campaign strategy.

WALKER’S HIERARCHY OF ENGAGEMENT:

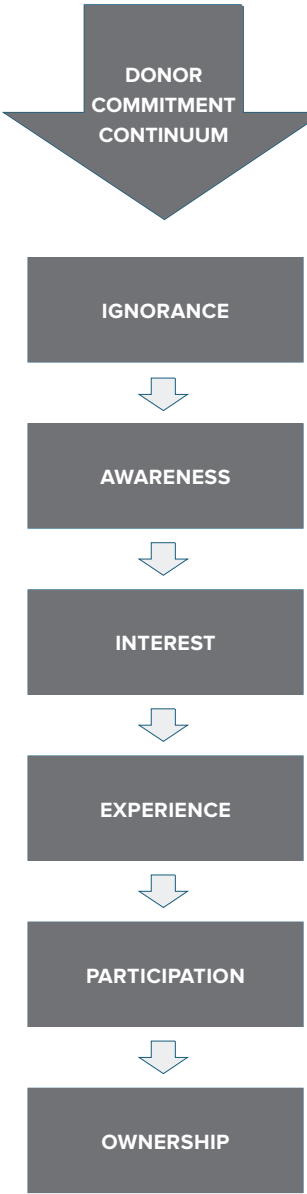
Using the Hierarchy of Engagement, the team was able to assess the degree of awareness and commitment among their donor base.



The communication plan needed to be updated: The feedback showed that their communication plan needed an update. Using the Hierarchy of Engagement, the team was able to assess the degree of awareness and commitment among their donor base. This uncovered a need for ongoing communication about the foundation and its mission.

- Awareness ranged from complete lack of awareness to solid understanding of what the foundation does and why.
- Engagement levels varied quite a bit from person to person.
- Desire to support the organization financially spanned a broad spectrum.

A segmentation strategy was necessary: The foundation learned that its donors were at all stages of the Donor Commitment Continuum (similar to customer lifecycle), and those differences needed to be taken into account.



(source: Advancement Resources)

A more personalized approach with donors was essential: Their “one size fits all” approach wasn’t cutting it. The study confirmed that donors care about different things and thus have diverse giving priorities, such as the type of clients who should benefit (e.g. women, children) and what the gift might fund. The team developed specific campaigns based on areas of interest - including offering individualized giving options that were personalized for specific donors.

LESSONS FOR CX PROFESSIONALS:

- Lesson 1:** Customers can have varying levels of awareness and familiarity with products and services. Thus, regularly review and refresh your communications strategy, messaging and tactics to ensure you are delivering and reinforcing the right information across your customer base.
- Lesson 2:** It is important to identify different segments of customers, including their specific needs and expectations. That information can be used to deliver optimal experiences for each group based on their requirements. Ultimately this will strengthen their engagement through the journey as a customer.
- Lesson 3:** Customers expect companies to understand their individual needs and challenges. They want and expect a more personalized experience. Thus, we need to know and understand our customers, and better integrate that knowledge into their experience with our organization.
- Lesson 4:** Leadership buy-in is essential for obtaining resources and support needed to act on the feedback.

RESULTS

Armed with the findings from the assessment, the team shared key insights and implications with organization executives and the Board of Directors. Through the resulting executive buy-in, they received resources to add to their team and confirmed the giving priorities – a key reference point for making decisions moving forward.

The team held a series of retreats and developed a three-year fundraising strategy based on donor insights, including:

- **Priorities:** Confirmed giving priorities and opportunities.
- **Segmentation:** Created personas of various donor segments.
- **Communication:** Designed a communication strategy using a segmentation model, taking into account the relationship stage, priorities and level of engagement. Multiple communication vehicles and events were put in place for different segments.
- **Campaigns:** Developed marketing campaigns based on segmentation, areas of interest and giving priorities.
- **Processes & Procedures:** Established tools and new procedures to fairly evaluate funding requests and ensure all funding decisions align with strategic priorities.

With the new strategy in place, the foundation increased funds raised by 33 percent, propelling it well ahead of fundraising goals.



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