

Data Strategy Forum



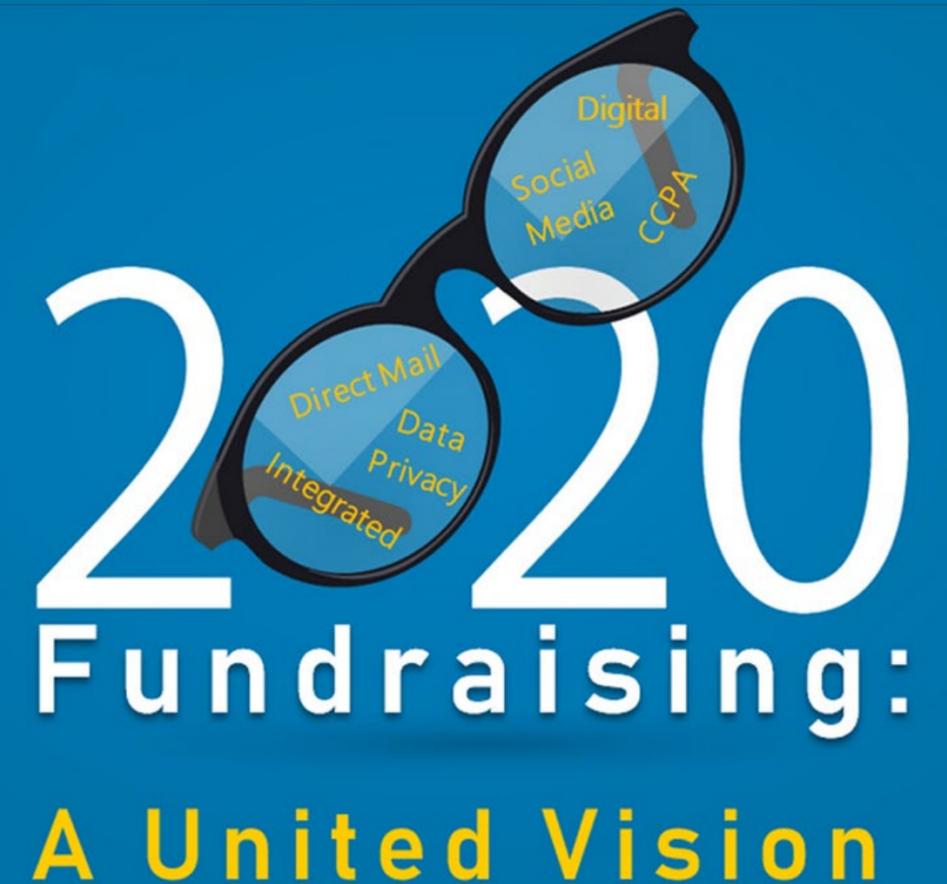
Donor Listening: How to Give Donors What They Want



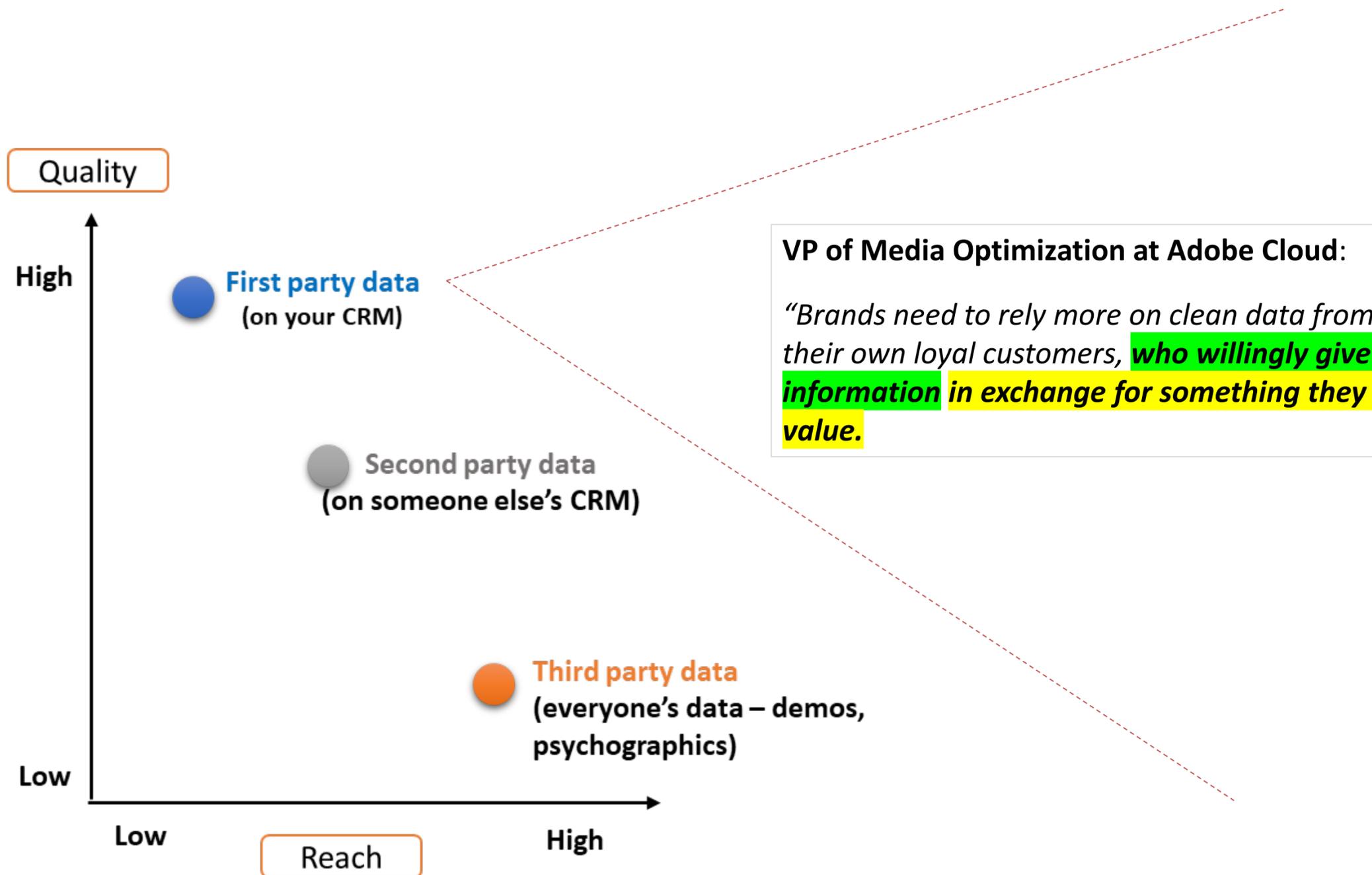
Kevin Schulman
Partner and Founder
Donor Voice & DVCanvas



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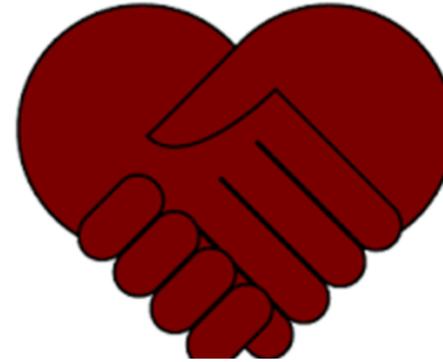
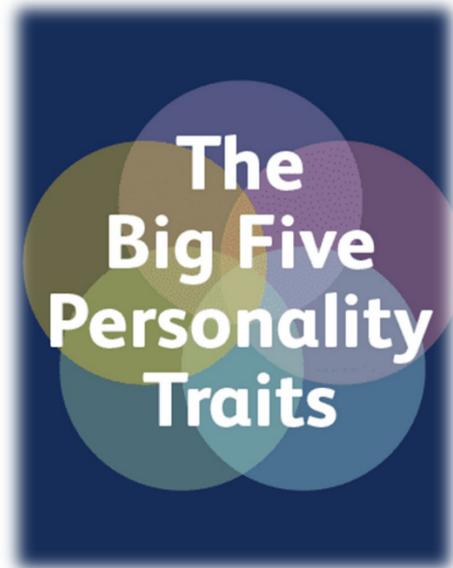


Wednesday, October 14 | 2:40 - 3:10 PM EDT



Zero party data

- Identity
- Personality
- Commitment
- Experience Ratings



Identity

The donor's sense of self and their innate reason for support.

- Learn how this is the key to strategic segmentation, one based on differing donor goals and values.

Personality

Donor's disposition, determines type of message they like, and predicts attitudes, opinions and behavior

- Learn how to message based on Personality and what proxy data to use to find different Personality types

Commitment

A measure of attitudinal loyalty to the brand.

- Learn how to use this to tailor the number of communications you send in year one.

Experience

Donor's judgement about quality of interactions with you

- Learn how to measure the quality of a specific supporter interaction, e.g. website donation, F2F signup, TM call, event attendance, petition signing



Donor survey

On a scale of 0 to 10, please indicate how much you agree with each statement

I am a committed Canadian Red Cross supporter

0 1 2 3 4 5 6 7 8 9 10

I feel a sense of loyalty to the Canadian Red Cross

0 1 2 3 4 5 6 7 8 9 10

The Canadian Red Cross is my favorite charitable organization

0 1 2 3 4 5 6 7 8 9 10

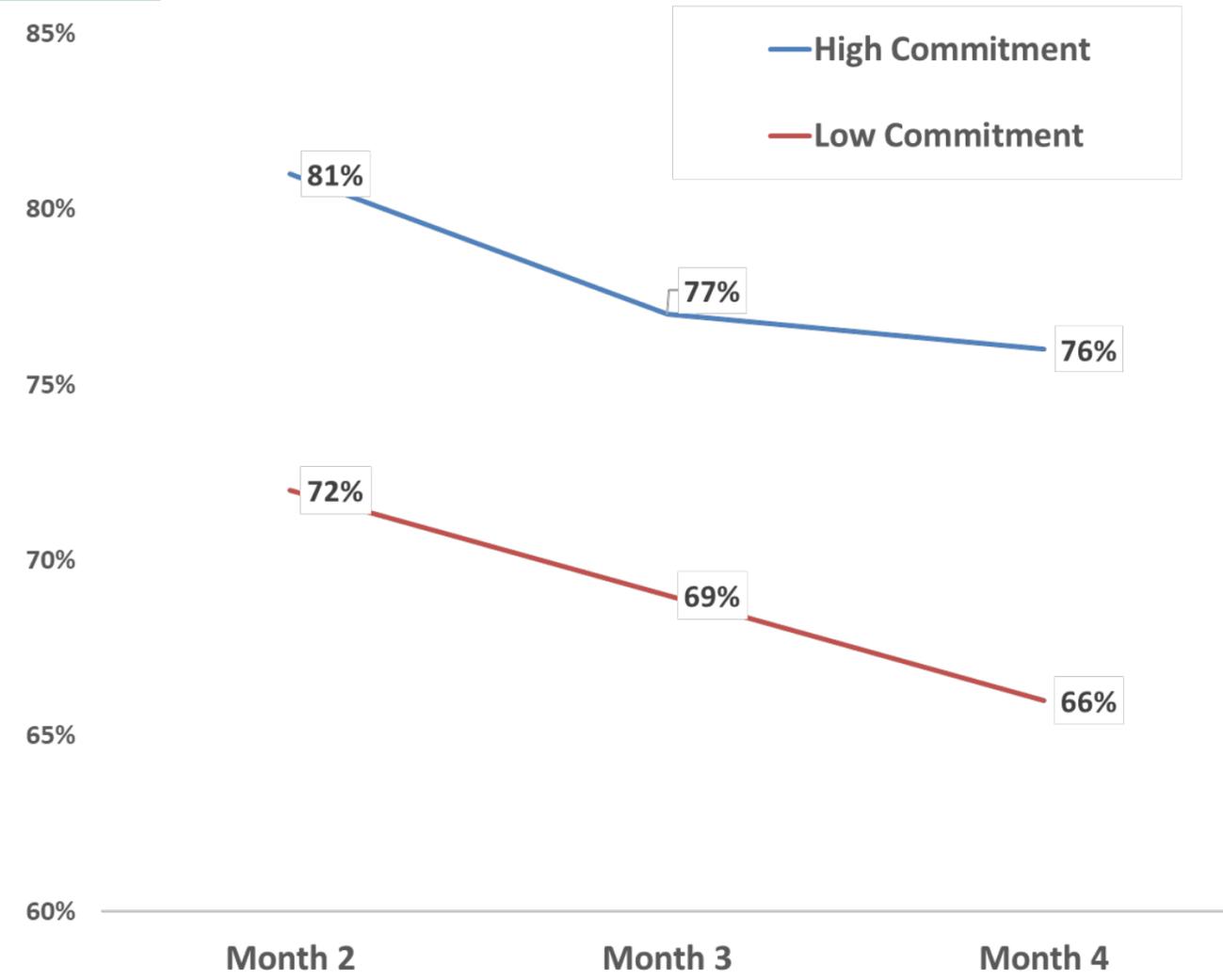
(0 being strongly disagree and 10 being strongly agree)

Next



Retention Rate

Commitment And Retention Rate



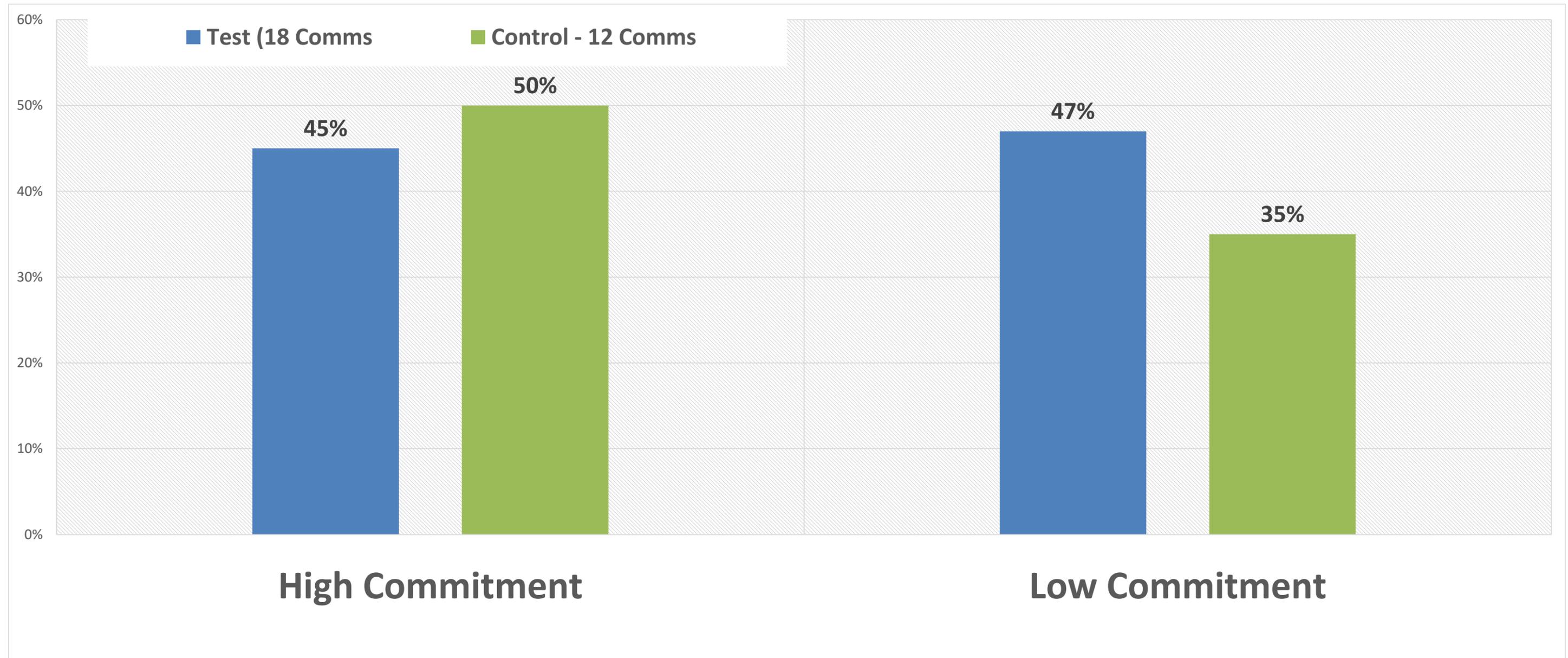


Commitment

A measure of attitudinal loyalty to the brand.



Why Commitment Matters



Gender

Religion

Sports team

Disease
survivor



Hobby

Alma
Mater

identity

Parent

Profession

Political
Affiliation

The Value of Showing Them We Know Them (Identity)

We must prepare now. The special interests are mobilizing and, if they have their way, Congress could make good on their threat to repeal animal protection laws. I know you want to prevent that as much as I do.

You and Animal Wellness Action are the antidote to their stonewalling and greed.

That's why I'm asking for your support this #Giving Tuesday. Every penny you can give will help advocate for better, more humane laws to shield horses from cruelty and keep all animals safe.

Donate today to help horses

Please breathe life into your values and support efforts to prevent cruelty against horses. Together, we will save many lives this year and next.

This means we'll need your help to battle those who defend dogfighting, who stand in the way of a national ban on the sale of dog meat, who scoff at the idea of a federal law against bestiality. Animal Wellness Action is the antidote to their cynicism and stonewalling.

Together we will fight for common-sense measures that will save many dogs from the worst types of torture.

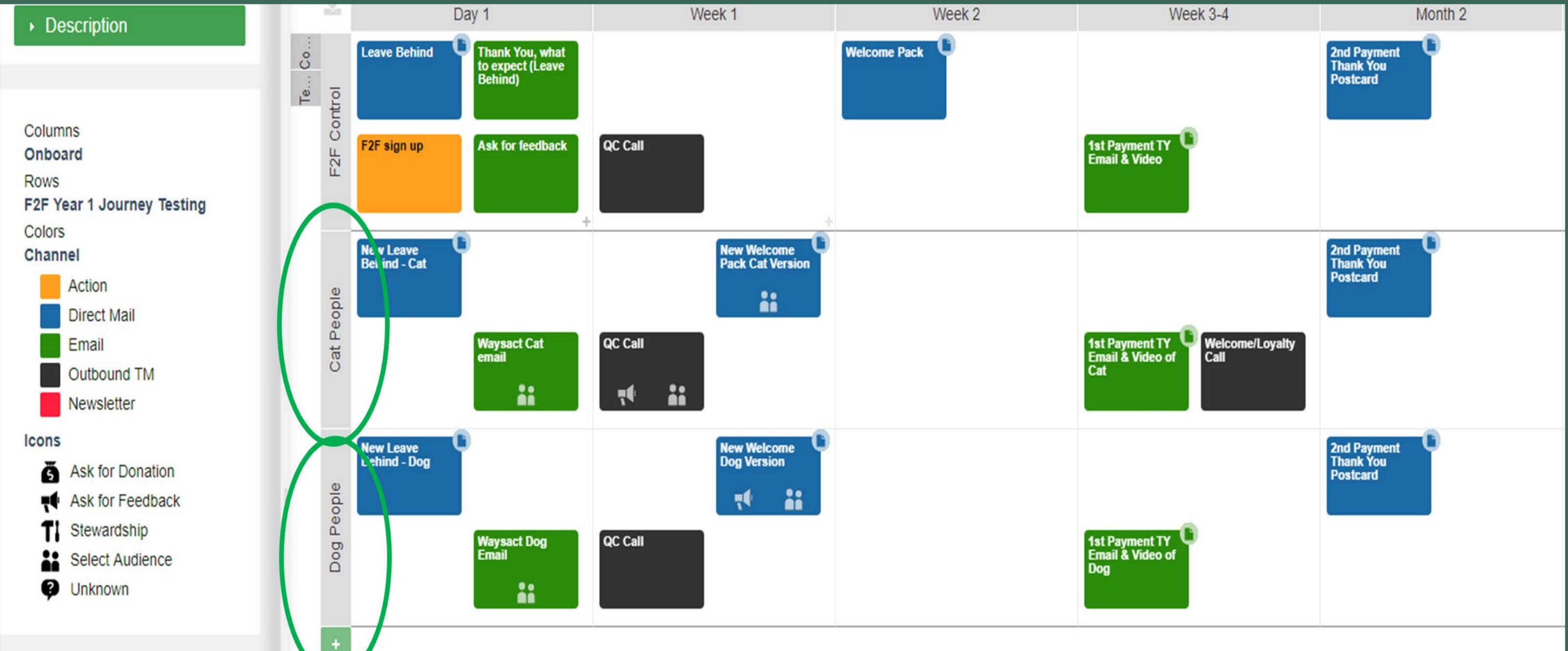
We must be active and tireless. Because if we're not, the special interests and the anti-animal forces in Congress will win. I know you want to prevent that as much as I do.

That's why I'm asking for your support this #GivingTuesday. Every penny you can give will help us prepare for the new Congress...to advocate for better, more humane laws...laws that shield dogs from cruelty and greed and keep all animals safe.

Donate today to help dogs

Please breathe life into your values and support efforts to prevent cruelty against dogs. We won't relent in our work to save them.

Welcome Email	Open rate	CTR	Unsub
Dog email to dog people	26%	.17%	.14%
Horse email to horse people	22%	.17%	.13%
Dog email to general	11%	.05%	.28%



Identity Leads to Real Donor-Centric Journeys

Identity and Conversion Rates

↑ 15% increase in conversion rate

↑ £10 more in donor value

And the calls were shorter...

And the information about the donor is even more valuable

Introduction

Good morning/afternoon/evening, you're through to <AGENT NAME>, on behalf of the RSPB. Are you calling for your Big Garden Birdwatch pack today?

Thanks so much. To make sure I get you exactly what you need I just need to take a couple of details, is that ok?

First can I ask which of the following best describes you?

- I am, first and foremost, a bird enthusiast
- I am, first and foremost, a nature enthusiast
- I would not describe myself as a bird or nature enthusiast

**Identity
Capture**

Measuring & Managing Supporter Experience to Increase Retention

AMNESTY INTERNATIONAL 

Door ons te vertellen over uw ervaringen, kunnen we beter beantwoorden aan uw behoeften. Amnesty International bestaat door geëngageerde supporters zoals u. Bedankt voor uw steun en engagement voor de mensenrechten!

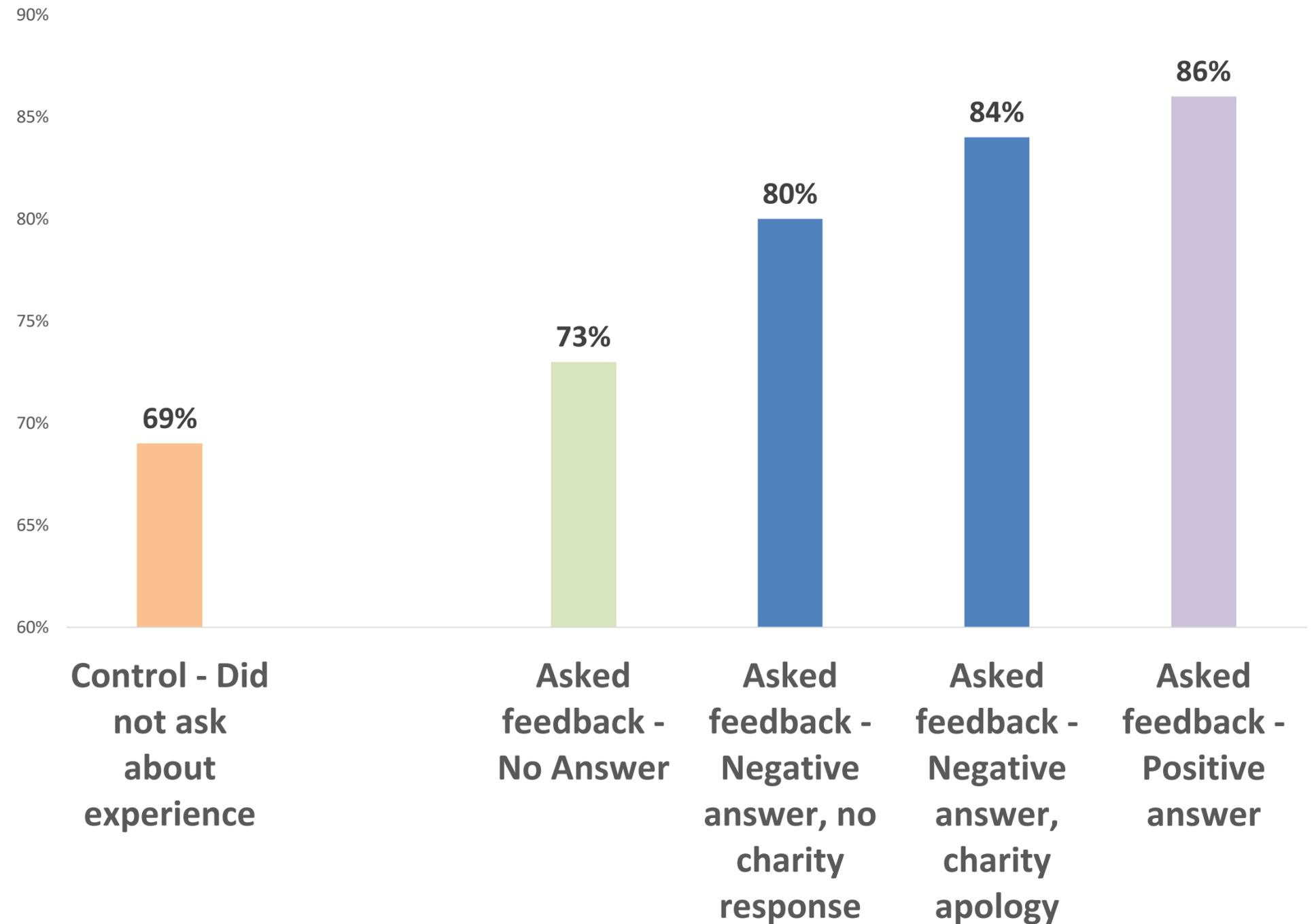
Hoe vond u uw gesprek met onze wervers?



Welke bewering gaat voor u het meest op?

- Ik blijf zeker elke maand een gift doen voor Amnesty International.
- Ik blijf waarschijnlijk elke maand een gift doen voor Amnesty International.
- Ik weet nog niet of ik elke maand een gift blijf doen voor Amnesty International.
- Ik blijf waarschijnlijk niet elke maand een gift doen voor Amnesty International.
- Ik blijf zeker niet elke maand een gift doen voor Amnesty International.

Kan u deze keuze in eigen woorden toelichten of heeft u tips voor Amnesty International om onze werving te verbeteren?





Autonomy

Relatedness

Purpose/Competence

Please tell us how true each statement is about your experience with our fundraiser.

	Not at all true	Not true	I'm not sure	True	Very true
The fundraiser was too pushy.	<input type="radio"/>				
The fundraiser and I got along.	<input type="radio"/>				
I felt I could make a positive difference.	<input type="radio"/>				
The fundraiser respected the fact it was my decision.	<input type="radio"/>				
The fundraiser was friendly.	<input type="radio"/>				
I felt a sense of accomplishment after our interaction.	<input type="radio"/>				

Thank you for your feedback



kschulman14@gmail.com
To 'Kevin Schulman'

Reply Reply All Forward ...

Thu 7/9/2020 4:52 PM

Cirrus Insight

+ Get more add-ins

Dear Sarah,

Committed donors, like you, make a lifechanging difference to someone in need. So, your experience is very important to us.

Variable Copy:

Low Autonomy : We're very sorry to hear you felt pressured to make a gift. The decision to help is entirely your own and we want you to be comfortable with it.

Low Relatedness: We're very sorry to hear your interaction with our fundraiser wasn't very positive.

Low Competence: We're very sorry to hear you didn't feel you could make a difference. This couldn't be further from the truth. On this [page](#) you can find our most recent successes, all thanks to generous supporters like you.

We appreciate you taking the time to help us improve. We'll be looking into this further so this doesn't happen again in the future.

If you'd like to share additional feedback, please don't hesitate to contact us anytime at XXXX.

Again, thank you for your feedback and your generosity.

Sincerely,

Supporter Care Team



Openness



Conscientiousness



Extraversion



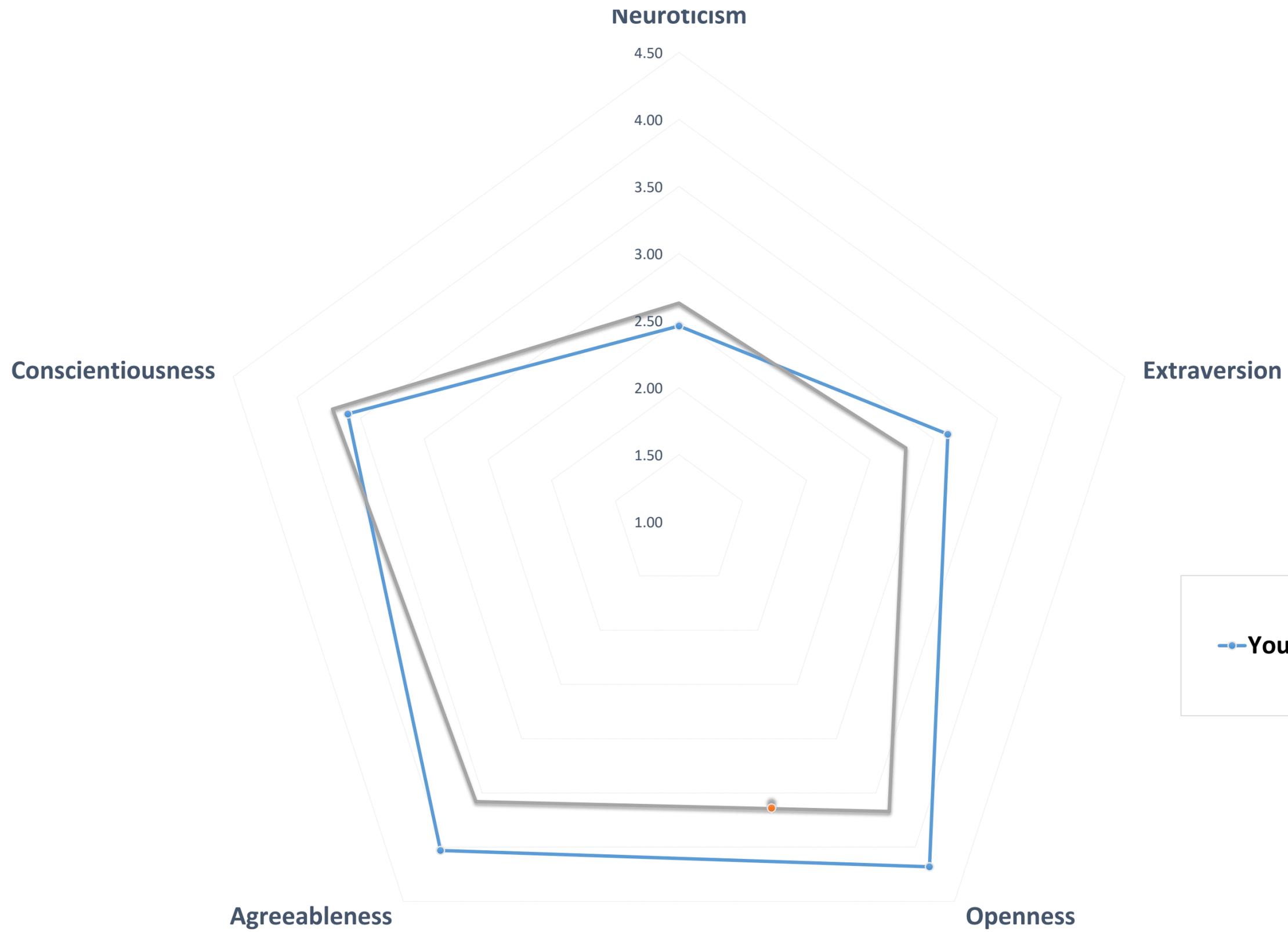
Agreeableness

**The
Big Five
Personality
Traits**



Neuroticism

Personality
(Their overall disposition)



Parent Test :
Target Parents & tailor message



Parent CTR: .63



Control CTR: .43

Personality Test:
Target Conservatives and prime Conscientiousness



High Conscientious CTR: .55
(Conservatives)



Low Conscientious CTR: .39
(Liberals)

The path to donor-centric fundraising

Personality

Agreeable

Conscientious

Parent

- **Signer:** Working mom
- **Personality messaging:** compassionate, caring, helping those in need, addressing unfairness.
- **Parent copy:** child and parent focused, establish empathy

- **Signer:** Stay at home mom
- **Personality messaging:** hard working parents with shared goal of providing for their kids, helping less fortunate, helping make community strong
- **Parent copy:** child and parent focused, establish empathy

Non-Parent

- **Signer:** Friendly Social Worker
- **Personality messaging:** compassionate, caring, helping those in need, addressing unfairness.
- **Non-parent copy:** adults in need, establish empathy

- **Signer:** Hard worker, blue collar
- **Personality messaging:** hard working parents with shared goal of providing for their kids, helping less fortunate, helping make community strong
- **Non-parent copy:** adults in need, establish empathy

Identity



4900 Puerto Rico Avenue, NE
Washington, DC 20017

A message to our caring community

[Mr. John Q. Sample]

[Address1]

[Address2]

[City, State Zip]



4900 Puerto Rico Avenue, NE
Washington, DC 20017

A message to caring parents

[Mr. John Q. Sample]

[Address1]

[Address2]

[City, State Zip]



www.capitalareafoodbank.org

[Mr. John Q. Sample]

[Address1]

[Address2]

[City, State Zip]



Dear [Salutation],

"Mom, are we going to eat today?"

Her kids had never asked that question before COVID-19.

Dialing the phone, she was fighting back tears and had trouble getting her words out. But it wasn't a choice, she knew she had to call, it was for her kids. She'd heard about Capital Area Food Bank, but would have never thought she'd need our help.

She didn't have an answer to the fateful question from her kids. But you did. Your caring gift provided food for her hungry children.

You haven't met Catherine, but she's your neighbor. She's lived in [Maryland] her whole life. She's a working parent, maybe like you. She cares about her town, works hard, and tries treating everyone with kindness. Things haven't always been easy, but she's managed. Then, it struck.

Like so many neighbors, she was laid off. And the day came when her last paycheck was spent, her fridge was empty, and her kids asked the heart-breaking question she couldn't answer:

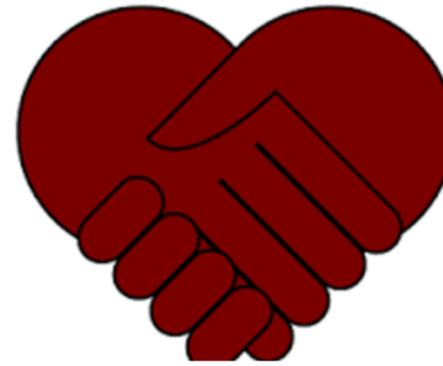
"Mom, are we going to eat today?"

(over, please)





The
Big Five
Personality
Traits



Identity

The donor's sense of self and their innate reason for support.

1. Form Hypothesis
2. Quick Testing (Facebook, AmazonTurk study)
3. Collect at point of Signup for F2F, TM
4. Use in F2F, TM script
 - Measure is the message
5. Start somewhere
 - Tailor at least 1 touchpoint based on Identity

Personality

Donor's disposition, determines type of message they like, and predicts attitudes, opinions and behavior

1. Do point in time Personality Measure to see supporter disposition
2. Message to dominate personality types, use 'self-selection' to your advantage
3. Make use of proxy to find those Personality types

Commitment

A measure of attitudinal loyalty to the brand.

1. Collect at point of Signup for F2F, TM, Website, Event
2. Send more/less based on Score
3. Ask once per year

Experience

Donor's judgement about quality of interactions with you

1. Collect right after interaction
2. Short, purposeful
3. Measure Needs
4. Continuous business process

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