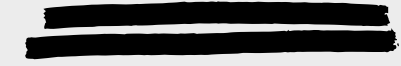


PLAYBOOK SERIES



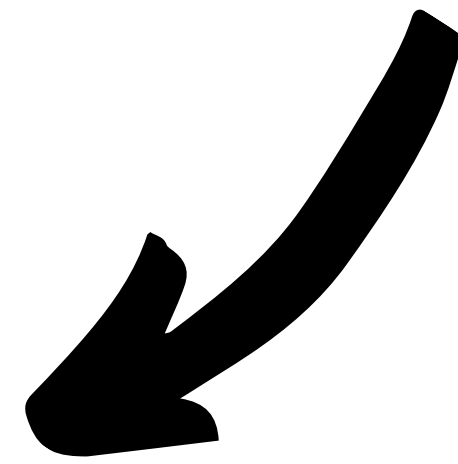
2021

BUILD CORPORATE PARTNERSHIPS



Applying Basic Business Principles to
Corporate Fundraising
4 Volumes





BUILD CORPORATE PARTNERSHIPS



LIKE A BOSS

PLAYBOOK VOLUMES



- 1 PROSPECTING
- 2 UNDERSTANDING YOUR VALUE
- 3 ACTIVATING YOUR AUDIENCE
- 4 STEWARDSHIP

Although classified as a not-for-profit organization, many of you are managing charitable organizations and even corporate revenue streams equivalent to the size of a small-mid market business. You're accomplishing all of this great work with lower resources and less efficiency. We thought it would be helpful to outline how basic business principles can operationalize and exponentially grow your corporate partnership programs.

Accelerist's new Playbook Series offers you actionable concepts and resources to fundraise from new or existing partners like a boss!

You bring the heart, soul and expertise. We'll bring the method, efficiency and a little madness. Let's go!



ACCELERIST
PLAYBOOK

2021



ACTIVATE

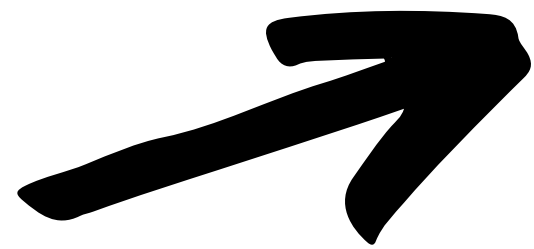


LIKE A
BOSS





ACTIVATE



LIKE A
BOSS

PLAYBOOK
OUTLINE



- 1 IDENTIFY YOUR SUPPORTERS
- 2 ACTIVATE YOUR SUPPORTERS
- 3 EVANGELIZE YOUR SUPPORTERS

BRIEF
INTRODUCTION



ACTIVATE

We believe that the success of any kind of fundraising hinges on how well you know about your organization's supporters.

Regardless of the position you hold or the team you're on at your organization, knowing your audience is critical. By understanding who these people are, you can tailor your programs, your solicitation, your partnerships to meet their needs, and provide specific types of service, support or cause engagement they're seeking.

An understanding of your supporters doesn't stop at demographics or wealth screening. In today's climate of cluttered marketing and cause-washing, knowing the motivations, needs and engagement preferences of your audiences will help you differentiate your organization and raise more critical funds.

We've borrowed basic business principles to help you better understand and activate your supporters like a boss! The same methods hold true for:

- Your Organization
- Your Capital Campaign
- Your Event
- Your Partnerships

IDENTIFY YOUR AUDIENCE

In the corporate world, businesses are hyper-focused on understanding their customer and mapping their "customer journey" throughout the company. These journeys can include a Buyer's Journey, Lead Nurturing, A Day in the Life of a Customer, Customer Service or even Customer Churn. A customer journey map helps to document the customer's experience - from initial contact or interest, through to product/service engagement and eventually into a long-term, loyal customer. Many nonprofit organizations also create Donor Mapping using a similar process and for like purpose. Whether it's a customer or a donor, it's essential to first understand your audience on a deep level to ensure the journey map is successful. On the most basic level, developing specific donor personas can help you raise more money...

- More *from* the same donors
- More *of* the same donors
- From companies looking to connect with your supporters
- From donors you haven't yet engaged, but are interested in your mission

Ideally, your knowledge of your audience extends beyond their donation history, demographic and current wealth. A robust understanding of your audience should include five types of analytics.

* Situational

Ask: Why is this audience supporting us?

DO: Implement first-touch surveys to establish motivation at the beginning of their journey

* Demographics

Ask: Who is this audience? How old? Social Status? Family Composition? Geography?

DO: Conduct qualitative survey or third-party analysis on your segments

* Psychographics

Ask: What are their...Attitudes? Beliefs? Values?

DO: Conduct qualitative survey or third-party analysis on your segments

* Multicultural

Ask: How can we be sensitive to cultural differences, language, societal values and communication styles?

DO: Analyze sub-segments and differences in culture and communication preferences

* Interest & Knowledge

Ask: How much does our audience know about our mission, our work, our impact? How interested in our program are they? Or even our cause?

DO: Survey supporters to level-set and adjust messaging accordingly



RESOURCE

Use this sample persona as a guide on how to talk about your audience, socialize your audience across departments and package them as a flagship asset for corporate partners to connect with.

MEET RACHEL



Rachel is a working mom with a husband and two kids. She's a connector by nature, and has climbed the corporate ladder to now lead a large team. As a mom on-the-go concerned about what her children eat, she frequents healthier quick service restaurants. From politics to celebrities, Rachel likes to stay on-trend, informed and knowledgeable about current events. Rachel is an active runner and cyclist, and enjoys putting her skills to work through her devotion to various peer-to-peer events that support health-related causes.

SOCIAL INFLUENCE

High-level Influencer who is 14x more influential than the average nonprofit constituency



DEMOGRAPHIC FACTORS

Age: 43

Gender: Female

Ethnicity: White

Income: \$75K+

Family Status: Married with children

Occupation: Homemakers and Management

Political affiliation: Republican

Location: Suburban areas

MOTIVATIONS

The health & welfare of her family

Connectivity and a platform to communicate with her friends

NEEDS

More time in the day

Stay informed and on trend

Outdoor exercise

ENGAGEMENT

High influencer, who can leverage her network to raise more awareness and funds for a good health-related issues

TOP BRANDS & INTERESTS

TOP SPENDING CATEGORIES

Household – Baby & Toys
Household – Appliances
Auto – Service
Sports
Health/Beauty

UNIQUE BRANDS (TOP 5)



INTEREST CATEGORIES (TOP 5)

Nonprofit
Health & Fitness
Right-Leaning Politics
Magazines
NFL Enthusiast

INTERESTS (TOP 5)



WHAT MAKES ME STAND OUT?

- 3x more likely to have a returning child at home
- Super shoppers of Outdoor Sports gear, Home & Garden and Family Apparel
- High interest in Health & Fitness, social causes and professional sports



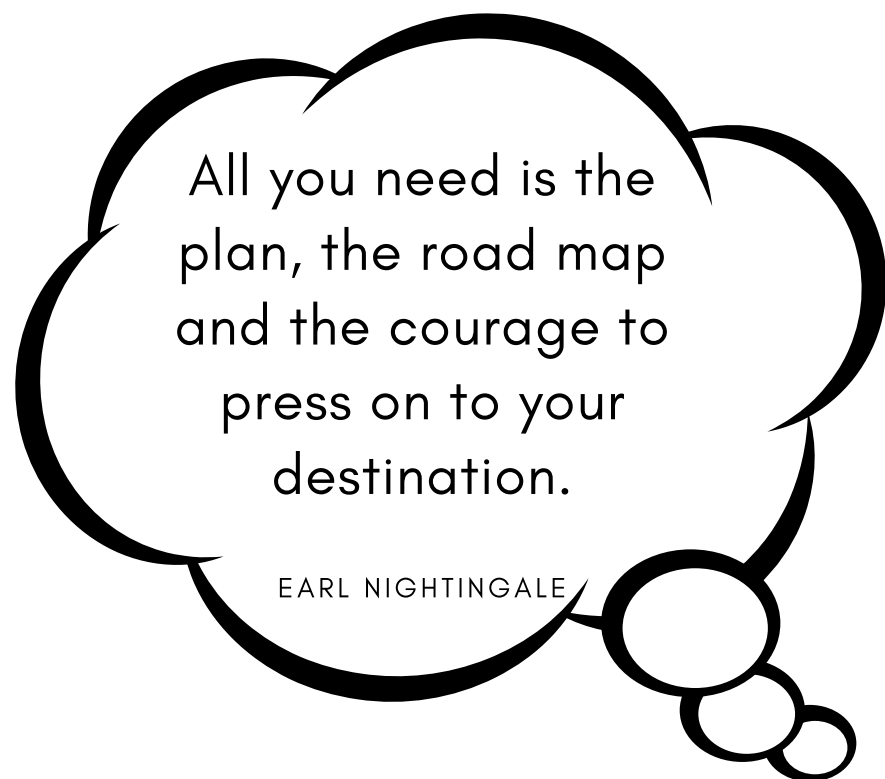
RESOURCE



Use this sample Supporter Journey Map to determine how each of your audience segments interacts with your organization, and how you can better engage them across programs, events and partnerships.

Supporter Journey: Current State	Step 1	Step 2	Step 3	Step 4	Step 5
<i>What is the supporter thinking or feeling?</i>					
<i>What is the supporter's action?</i>					
<i>What is the supporter's touchpoint(s) with the organization?</i>					
<i>What do we want to change about this step?</i>					
<i>How and/or why will we make this change?</i>					

ACTIVATE YOUR AUDIENCE



As a company or a nonprofit, we want our supporters to first take an initial action (i.e. purchase a product or donate to our mission), but then we want them to do more. To build longstanding brands and organizations, we must engage our supporters in multiple ways and leverage their influence to engage others. Once we know *who* our audience is, we must then adjust our strategies, design, communications and partnerships to speak to their greatest needs. Let's put our audience knowledge to work!

- 01 STRATEGY** → Design or refine your programs, events, campaigns or partnerships in a way that aligns with your target audience's passions and interests. Be able to pivot in a supporter-centric way when circumstances require it.
- 02 USER EXPERIENCE** → Uncover your supporters' needs and challenges as the starting point for designing solutions and campaigns. Incorporate personalization that is connected to motivators like returning fundraiser, survivor, etc. Conditionalize content that speaks to where the supporter is in their journey.
- 03 COMMUNICATION** → Use segments and conditional content for new and returning supporters, fundraising progress, specific brand lovers, team captains, or giving day supporters. Target different mediums to meet your supporter where they mostly communicate.
- 04 CULTIVATION** → Build a tiered Moves Management plan. Honor your top supporters equally - whether they are P2P fundraisers, major donors or partner ambassadors. Be mindful of their recognition preferences to ensure cultivation of a segment is received well.

RESOURCE



Use this sample Audience Activation Plan to target communications to different segments, and activate your audiences around specific events, campaigns or partnerships.

AWARENESS	CULTIVATION	SOLICITATION	RECOGNITION
<u>6 Months</u> (pre-campaign)	<u>3 Months</u> (pre-campaign)	<u>3-6 Weeks</u> (pre-campaign)	<u>3 Days</u> (post-campaign)
<ul style="list-style-type: none">• Content marketing focused on organization's mission expertise, deployed via email and on social media• Closed Facebook group, with consistent points of engagement• PR coverage on local news outlets, with clear and frictionless ways to donate	<ul style="list-style-type: none">• Stories of impact• Mission-served video content• Like-minded peer stories of fundraising success demonstrating low-lift, high-yield• Top 5 Reasons to Get Involved with the organization or Giving Day• Meet and Greet webinar with organization's executive	<ul style="list-style-type: none">• Fundraising threshold incentives• Template fundraising toolkit for turnkey team building• New ways (i.e. virtual, mobile, etc) to recruit and donate to organization/event• Personal executive phone calls to drive engagement• Consistent emails & text when fundraising thresholds are met	<ul style="list-style-type: none">• Public recognition of fundraising milestone via event social media• Social Ambassador badge they can share "I Supported ORG" with their networks• Impact report on donation allocation• Invitation to VIP council or Ambassador group post-event to stay involved with mission

EVANGELIZE YOUR AUDIENCE



Companies today are infinitely more engaged and committed to their target audiences, and that directly translates into improving brand loyalty and overall customer experience. That said, there is still a huge difference between those who love and advocate for a brand and those that simply use their favorite products or services out of a sense of loyalty or habit. The goal for any business owner must be to convert customers into brand ambassadors.

Your job as a charitable fundraiser is no different. Here are 10 ways brand marketers are converting customers into ambassadors. Consider how to apply these tactics to your own supporters.



01 ASK FOR FEEDBACK

Simple donor feedback surveys are gold when adjusting and evolving strategy.

02 DELIVER AMAZING SUPPORTER EXPERIENCE

Easy-to-navigate, low-friction experiences drive greater conversion.

03 CREATE LOYALTY SUPPORTER PROGRAMS

Generate an incentive program that encourages long-term support. Maybe a matching gift trigger upon the 3rd gift?

04 VALUE-BASED SUPPORT

Despite being in the "charity" business, offer impact messaging, matching gifts or other items of value to those supporting you.

05 IMPLEMENT A REFERRAL PROGRAM

You don't have to have a peer-to-peer fundraising event to encourage supporters to invite others to support you.

06 PERSONALIZE THEIR EXPERIENCE

Everyone loves to feel special! Conditionalize their supporter journey based on their needs.

07 "JUST BECAUSE" GIFTS

Remember large donor birthdays or special occasions. Send Thank You notes to supporters who worked up a bunch of buzz around a partnership.

08 INFORM SUPPORTERS

Cultivation is about communication. Supporters don't just want to be solicited, they want to expand their knowledge of you, your mission, your partnerships. Keep them informed all year.

09 EMPOWER THEIR VOICE

Offer supporters turnkey toolkits to help you amplify a campaign, event or partnership through their networks very easily.

10 ASK FOR UGC

Involve supporters in the process. Ask them to submit user-generated content to help you and your partners tell an authentic story.

'''
**NOW, GO
ACTIVATE LIKE
A BOSS!**



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