ROI
MODULE

ROI CUSTOMER TOOL GUIDE

ACCELERIST

INTRO TO ROI MODULE

BASIC INTRODUCTION

Step 1 - Log on

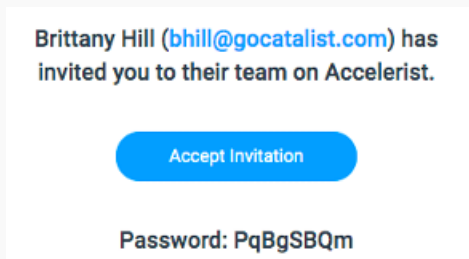*For Existing Members:*
Visit members.accelerist.com. Your existing login and password will automatically work.

For New Members:
1.) One team admin will need to register your account at members.accelerist.com. Once your organization is registered, it will take no more than 24 hours to approve the admin to begin using the system.

2.) Account admins are able to invite users via an invite link found on the "Users" tab. New users that have an existing organization in the system do NOT need to register. They will log in using their email and the password provided via the invite link. The invite looks like the below:

Brittany Hill (bhill@gocatalist.com) has invited you to their team on Accelerist.

Accept Invitation

Password: PqBgSBQm

3.) Once you are logged in, you will be able to personalize your account and change your password.
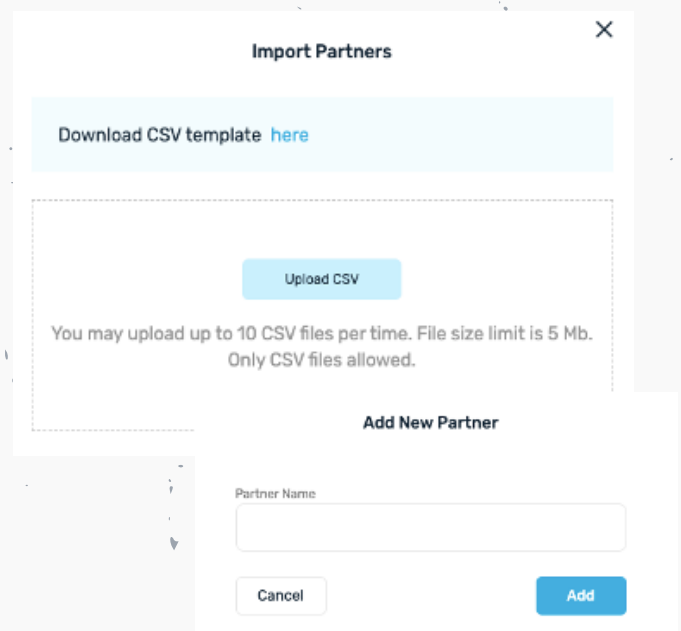
Step 2 - Begin Using the ROI System

Navigate to the "ROI Tab" at the top of the page. See example below:

ACCELERIST   Dashboard Audience Pricing ROI Prospecting

ROI
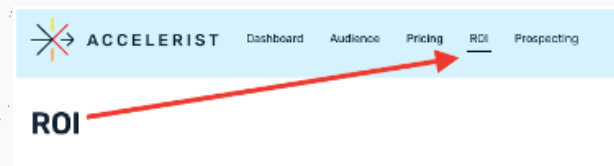
The ROI Module will then display the number of partnerships that you have added as a user. If you would like to add new partners to manage, steward, or measure you have two options: Click "Add New Partner" or for a mass import, you can import a list of partners.

If you click "Add New Partner", you will be prompted to add the partner name and click Add.

If you choose to import partners, you will need to upload a .CSV file of the partner names.

Import Partners   ×

Download CSV template here

Upload CSV

You may upload up to 10 CSV files per time. File size limit is 5 Mb. Only CSV files allowed.

Add New Partner

Partner Name

Cancel   **Add**

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Once you have your partnerships added you can then add more detail. "Manage" will automatically be featured where you are able to manage your partnership. If you wish to enable Stewardship planning and/or Measurement, simply click the three dots featured on the bar and you can enable or disable features as you wish. You can also delete a partnership if you no longer wish to track it in our system or have added it by accident.

Test	📋 N/A	📅 N/A	Manage	Steward	Measure	• • •
					Disable Manage	
					Enable Steward	
					Enable Measure	
Partner #2	📋 Premium Stewardship Plan	📅 Feb 05, 2022	Manage	Stew...	Delete	
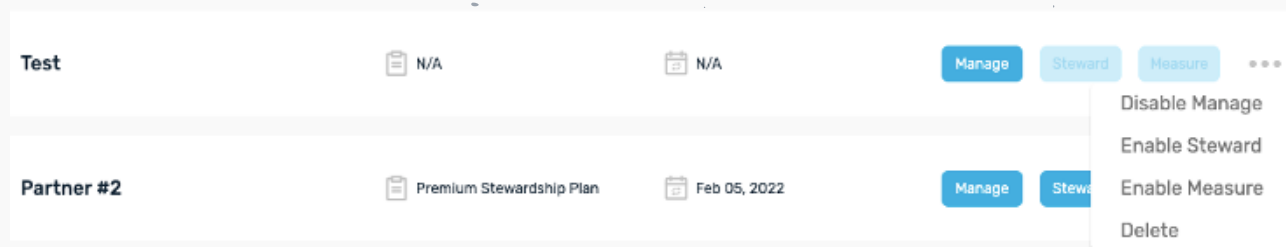
Step 3 - Manage

On the manage tab, we ask for basic details to get an idea of whom you are partnering with, their commitment, and any relevant dates or contact information we or your team should be aware of. In managing your partnership, we ask for the following details:

- **Company Name** – You can type the company name in directly. If the company is already in our database company information will automatically populate.
  - If the Company name is not featured, click "Add New Company" this request will prompt us to add these new companies within 24 hours to our system so that you are able to add their information.
- **Company URL**
- **Company Address**

- **Annual Fundraising Commitment** – This is the commitment amount your partner typically contributes to the partnership or campaign
- **Renewal Date** – This is the date that the partnership is set to renew. If there is no set renewal date, please think about this option as to when you would like your annual report generated to present to a partner. This date helps us track when a partnership may conclude or when you may require more information and you will receive reminders to fill out impact data surrounding your report based on the date entered.
- **Account Owner** – Who on your team is the primary person to contact regarding the partnership if the Accelerist team needs to work with you to fine-tune reports.
- **Contact** – Any other contact information that may be relevant to the partnership.

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Step 4 - Steward

On the Stewardship tab, you are asked more about your partnership goals, commitment, and detail around the partnership. This tab allows you to create a custom stewardship plan for your partner. We ask for the following details:

- Is the partnership Active?
- Partnership Goals
- Potential Commitment
- Longevity of Partnership
- Additional notes (optional)

Once you have these details entered, you are able to generate a recommended stewardship plan based on your partnership goals. These plans make suggestions surrounding ways to maintain, grow, and maximize your partnership.

Included in your plan can be a suggested kick-off call with a partner, monthly partner meetings, partner toolkits, partner appreciation events, annual partner satisfaction surveys, etc. We also provide templates surrounding these if you would like to deploy emails directly from our system.

Note: If you already have a detailed stewardship plan offline, you are able to disable this function and it will not affect your overall impact report.

Step 5 - Measure

The Measure portion of the ROI module has two functions - tracking and impact reporting.

Tracking – In tracking, we ask for the following:

- Campaign Keywords
- Campaign Specific Hashtags
- Partner social handles (include all networks)
- Nonprofit social handles (include all networks)
- Influencer handles (if any)

These allow us to begin our tracking of the partnership. If there are special stipulations to the partnership please let your account manager know.

For example, if this campaign involves other partners and you want to make sure your keywords are only picking up things relevant to your organization. We can then monitor your tracking and make sure we are tracking appropriately.

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Once your tracking data is entered, click "track partnership". You will then get a notice that a tracking request was sent and that an admin is reviewing your tracking data to be published.

Once this is published, you will have your own tracking dashboard that includes a content stream, media exposure, sentiment, trending themes, heat map, top retweets, etc. It will be updated automatically on a monthly cycle. If you need to make edits to change keywords or add to tracking information, please let your account manager know.

Impact Reporting – To fully capture the corporate-NPO partnership and understand your return on investment, we need your help to catalog your tangible and intangible contributions. This includes information on fundraising, brand value, experiential services, data measurement, ambassadors, and media assets. In this section, we ask for the following information to round out your report.

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- **Fundraising**
  - Total Funds raised from consumers
  - Total Funds raised from employees
  - Total funds raised from the company
  - Total underwriting or additional funds
  - Total number of donors engaged
- **Ambassadors**
  - Did you have any brand ambassadors, executives or influencers involved in the partnership?
  - How involved were the executive champions in the partnership?
  - How involved were the celebrities in the partnership?
  - How involved were the employees in the partnership?
- **Stewardship**
  - What kind of stewardship elements did you afford this partner?
  - Select applied custom stewardship items
- **Partner Activation**
  - Did your partner support you with any of the following opportunities:
    - Access to agencies, vendors or portfolio brands
    - Engagement from their ambassadors or influencers
    - Paid Media
    - Owned Media

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- **Impact** – You have the ability to describe how the funds and support generated through the partnership were used to support your mission.
- **Paid Media**
  - Did you Support the partnership, campaign, or event with a paid media spend?
  - If Yes, a drop-down menu will appear outlining the number of impressions and paid spend on impressions
- **Owned Media**
  - Did you support this partnership, campaign or event with a paid media spend?
  - If yes, a drop-down will appear outlining impression numbers
- **Social Media**
  - We are actively tracking social media however this gives you the opportunity to round out or submit additional social media metrics for the partnership should you choose to do so.

All of this information will be primarily used to create your overall metrics for the report. You can save and come back to this page as many times as you would like before the report is generated. You will also receive a reminder to fill out this page based on your partnership renewal date mentioned in the "Manage" tab.

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If you wish to customize the final report further we offer the "Customize Report" section. This allows you to upload a logo and photo to be featured in the final report.

When the Impact Reporting section is filled out to your liking, click "Generate Impact Report". Your report will be generated within 48 hours.

STEP 6 - The Final Report

The final report will include the following:
- Custom Photo (If added)
- Tracking Metrics and Summary
- Partnership Goals
- Mission Impact
- Total Funds Raised
- Total Media Value
- Overview of Engagement
- Overview of how you stewarded the partnership as an organization
- Overview of Partner Activation
- Impressions
- Value
- Benchmarking
  - Overall Partnership Value
  - Return on Partnership

ANALYZING YOUR REPORT

Methodology

Accelerist's ROI Report is generated from a proprietary assessment tool that evaluates your organization's value to a corporate partner, your partner's value to you, the overall partnership value, and the return on investment for both partners.

For the length of the partnership, the report presents the amount raised and the amount spent on media support, mission impact and mission alignment, experiential support, media monitoring and benchmarking, brand value benchmarking, and the return on investment for both partners.

Return on investment is the ratio of net value gained given your total investment or your corporate partner's total investment. To determine ROI, Accelerist 1) calculates the value of each partner's tangible media assets, based on industry-standard media formulas, and 2) translates various brand assets, including length of time in existence, cause sector, impact on the mission, third-party organization ratings (e.g., Charity Navigator), and mission relevancy, into standardized quantitative values.

These two values – brand value and media value – are combined to determine overall partnership value for each partner. Using this value, each partner's return on investment is calculated given their investment into the partnership.

Understanding Your Outcomes

The ROI Report looks at both **Intangible (Brand) Value** and **Tangible (Media) Assets** of both the nonprofit organization and the corporate partner.

Tangible Media Value is a measure of media assets each partner can leverage for a partnership. Media assets include media ambassadors, paid media, earned media, owned media, and shared or social media. In the report, this value is reflected in the following areas:
  - o Content Stream
  - o Media exposure
  - o Partner Activation
  - o Impressions

Intangible Value is a measure of those assets that are not physical or otherwise tangible in nature that each partner brings to the partnership. Examples of intangible assets include brand recognition, mission, size and scope, supporter or employee base, ambassadors, and impact on mission. Your intangible value is captured in the following areas:
  - o Partnership Goals Met
  - o Mission Impact
  - o Engagement
  - o Stewardship
  - o Benchmarking

ANALYZING YOUR REPORT

Media Assets

The Total Media Value and Media Breakdown are aggregate values that show the combined contributions of your organization and your corporate partner.

Total Media Value: This value is the total value of all media assets – paid, earned, owned, and shared – leveraged by both partners for the partnership. The values for each media category are calculated based on industry-standard and widely accepted media formulas. The total value is aggregate and includes both nonprofit and corporate contributions.

Partner Activation: This chart further breaks down each media asset – paid, earned, owned, and shared – to detail what elements contributed to that total. The chart shows total impressions and total value for each kind of media, and also notes whether the contributor was the Non-Profit, the Partner, or Shared.

Impressions, Value and Benchmarking: This is a snapshot of media assets by category measured against benchmarks for paid, earned, owned, and shared media assets that are typically employed in similar partnerships. The values are aggregated and include both nonprofit and corporate contributions.

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Tangible Asset Value

Engagement is a measure of the involvement of executive champions, celebrities, and employees in the partnership.

The Value in Ambassador Engagement: Both partners want to know that the other party can engage and activate influential ambassadors whose values match the mission. These genuine connections boost the partnership's reach and its potential value. Being able to demonstrate a deliberate and effective influencer or celebrity strategy increases the potential value of your partnership.

Stewardship

Stewardship is a measure of how your organization went above and beyond straightforward support, like dollars, to manage and cultivate the partnership.

Successful partnerships are all about relationship-building and communication. Creating opportunities for engagement and multiple touchpoints throughout the course of the partnership will strengthen the relationship and ensure that it stays on track for both partners.

ANALYZING YOUR REPORT

Benchmarking

Overall Partnership Value for the Nonprofit:
This is an aggregate of the value that the company contributed to the partnership in the following ways: monetary or in-kind contributions, marketing and media support, and brand value.

Overall Partnership Value for the Company:
This is an aggregate of the value that the nonprofit contributed to the partnership in the following ways: marketing and media support, and brand value.

Return on Partnership (Nonprofit): The measure of overall partnership value less the nonprofit's contribution divided by the nonprofit's contribution, reported as a percentage.

Return on Partnership (Company): The measure of overall partnership value less the company's contribution divided by the company's contribution, reported as a percentage. An ROI of 150% is industry expectation for corporate partners.

Brand Value Benchmarking

Accelerist presents the brand value that the nonprofit and corporate partner each brings to the partnership. Accelerist scores both partners across core metrics to calculate the comprehensive brand value. For your nonprofit organization, brand value incorporates charity navigator rating, the size of your supporter base, geographic scope, stewardship activities used for the partnership, and impact on mission - as you report it. For your partner, brand value is based on size, scope, employee base, ambassador engagement, and other intangible support provided for the partnership, as well as Interbrand and Reputation Institute's annual brand trust studies.

Then, Accelerist benchmarks your organization and your partner against like-minded, similar-sized organizations across five areas: mission alignment, brand value, constituent impact, ambassador engagement, and stewardship or access. This visualization helps you understand where your partnership stands now and where opportunities exist to adjust the course.

Please note: The report is not automatically shared with your corporate partner, nor is that required. The report is for the nonprofit's internal information, evaluation, and strategy. To share the entire report, you can download a pdf version. You may also download the report information in an excel sheet to edit information as you see fit to present to a partner.

If you have additional questions feel free to reach out to us at members@accelerist.com. Further answers can be found on our FAQ page found here.