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Evolution of a Donor Calling Program

Sarwat Maqbool
Australian National University

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Acknowledgement of Country



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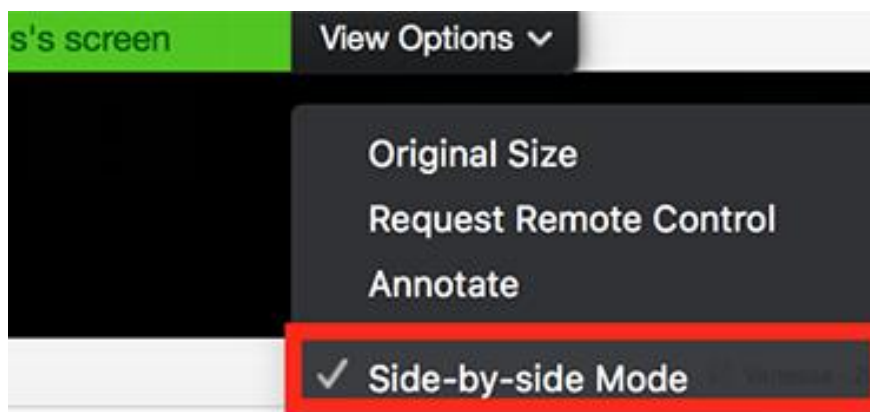
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Welcome



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What to expect?

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What to expect?



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What to expect?



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Poll 1

If you could chose a superpower, what would it be?

- Invisibility.
- Mind reading.
- Travel through time.
- Pfft! Wishing for superpowers is for the weak.

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Poll 2

Do you have a formal stewardship calling program at your institution?

- Yes.
- No.
- I am not sure.

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Listening
Personal Engaging
Understanding
Responsive
Immediate
Two-way
Solutions
Dynamic

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Problem statement

We have limited DR activities that are dominantly dynamic, two-way and interactive.

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Myth busting



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Myth busting

MYTH 1 of 3

Calling donors will give them the opportunity to cancel their regular giving.

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Myth busting

MYTH 2 of 3

A call does not add any value to the existing stewardship suite.

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Myth busting

A call does not add any value to the existing stewardship suite.

Key drivers for donor commitment

1. Donor perceives organization to be effective
2. Donor knows what to expect with each interaction
3. Donor receives a timely thank you
4. Donor receives opportunities to make views known
5. Donor feels like they're part of an important cause
6. Donor feels his or her involvement is appreciated
7. Donor receives info showing who is being helped

<http://www.thedonorvoice.com/national-donor-commitment-study-and-proof-of-link-between-donor-attitudes-and-behavior/>

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Myth busting



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Myth busting

MYTH 3 of 3 Calling is in-effective

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Myth busting

1. Timely
2. Callers are representative of the institution
3. Scripting

39 %

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Myth busting

1. 2019 research on efficacy of donor calls
2. University of California, Centre of Economics and Social Research and Blackbaud
3. Half million donors and quarter million surveyed

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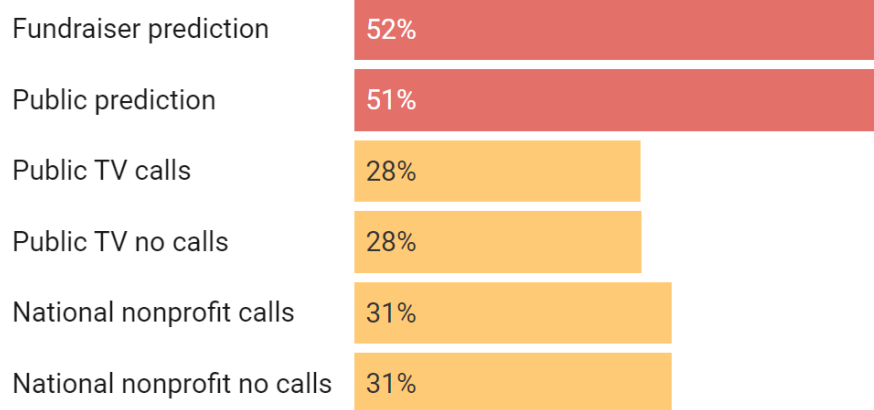


Chart: The Conversation, CC-BY-ND • Source: [Anya Samek and Chuck Longfield](#) • [Get the data](#)

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Myth busting

- 70 TV stations and one non-for-profit
- 3-7 months after the gift
- Outsourced to a call centre



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Myth busting

- 3,729 nonprofit organizations in the US and Canada, and their 1,915,939 donors
- Calls were made within 90 days of the gift
- and the result was...

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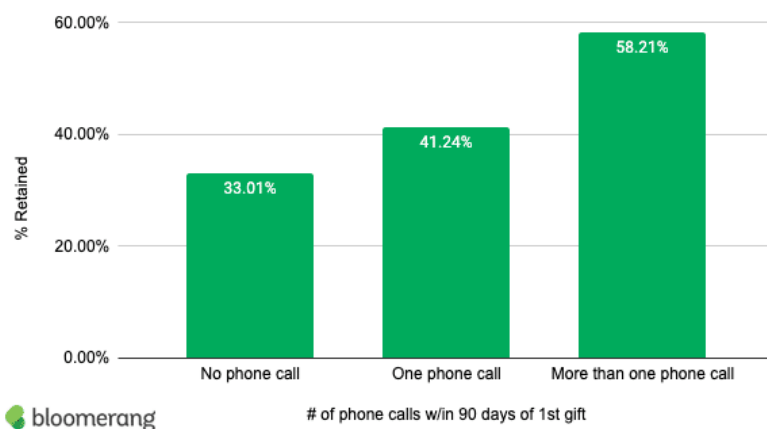


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Myth busting

Impact of phone calls on 1st-time donor retention



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Poll 3

What is/was the key hesitation that stopped or is stopping you from starting a calling program for donor stewardship?

- Too resource intensive.
- Other communication channels work just fine.
- I am not convinced calling adds value.

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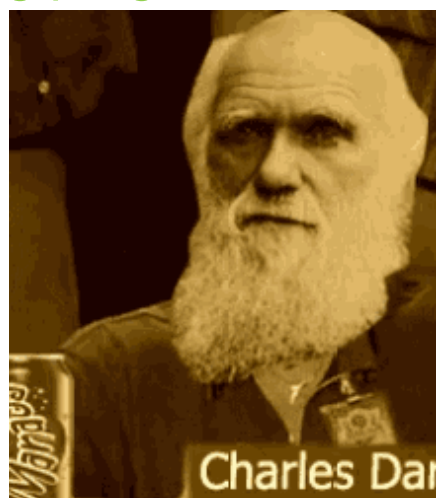


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How it all started?
How is it going?
Where to now?



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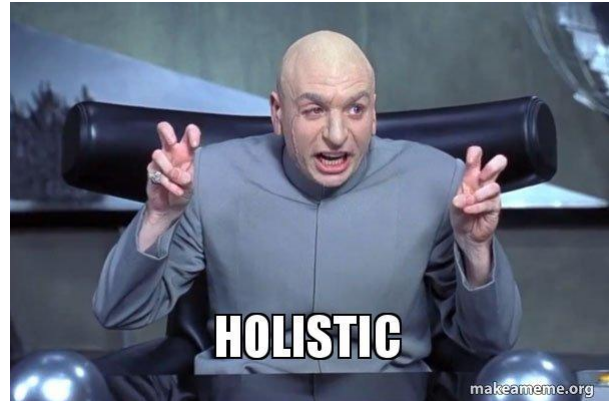


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Why call?

- Donor centric approach
- Calls to say “thank you”
- Part of a larger program of stewardship.



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Calling in 2016-18

- 75 calls
- Rudimentary operation
- Not tracked
- Anecdotal evidence

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Calling in 2019

- Formal program
- Student callers
- Scripting and tracking
- Building program specific literature

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Calling in 2019

- **163 conversations**
- **467 interactions**
- **284 emails**
- **18 hand written postcards**

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Calling in 2020

- **173 conversations**
- **430 interactions**
- **257 emails**
- **18 hand written postcards**

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Calling in 2020

- **173 conversations**
- **430 interactions**
- **257 emails**
- **18 hand written postcards**
- **8 donors made a donation**

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Calling in 2020



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Donor retention



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Donor retention



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Donor retention



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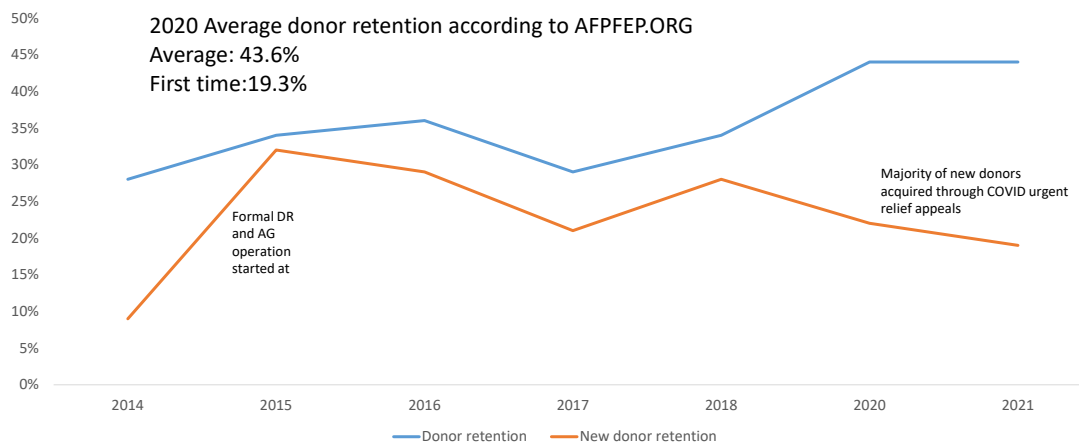
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To retain but not to report (at least not exclusively)



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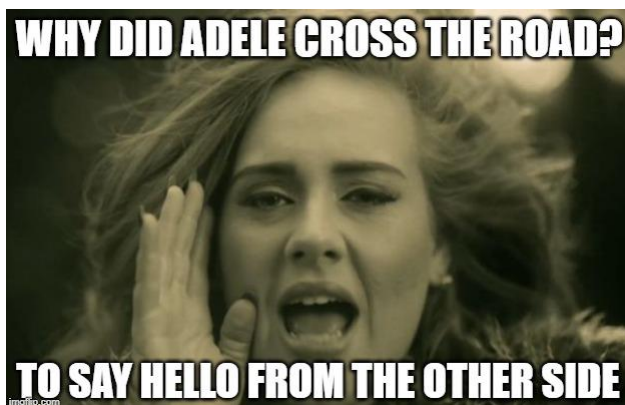
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Emergence of Care Calls



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Emergence of Care Calls



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Care Calls – key upgrades

- Student callers
- Callers had access to our CRM to check each donors profile
- Extensive cohort analysis
- Calling scripts
- Clever personalisation

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Personalise cleverly



THANK YOU

From a grateful ANU student



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Outcomes of the 2021 Calling Blitz

- From 3 views to 57 views



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Outcomes of the 2021 Calling Blitz

- Open rates jumped to 46.9% (Industry average is 22.71%)



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Outcomes of the 2021 Calling Blitz

- Click to action rates jumped to 32.7% (Industry average is 2.91%)



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Care Calls – what is next?

- Reduce the cost per call
- Call international donors

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Care Calls – what is next?

- Better planning, better messaging
- Better alignment with solicitation appeals
- Engaging more staff and later the Foundation Board and University Executive

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Care Calls – what is next?

Internal promotion and advocacy

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Add on...



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Key take away

- **Segment** (New donors, loyal donors)
- **Steward** FIRST. Solicit SECOND.
- **Shape** the stakeholders. Especially the internal ones.

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the Sound a “Thank You” makes’

***And so,
for the sake of your own organization’s health,
and for the sake of finding a bit of joy in your own day,
pick up the phone.***

Say “Thank You.”

***And listen to the sound that Thank You makes
when it lands in your donor’s heart.***

- Stolen words of Hildy Gottlieb’s ‘the Sound a “Thank You” makes’

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Questions

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