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**The donor's experience is a direct result of  
your culture and how much you respect them**

**Project 16. Creating a distinctive service culture**

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## The original brief

Notoriously, charities have consistently underinvested in even basic customer service, both people and systems, which undoubtedly affects the donor experience, particularly retention. This project will define the components of optimum levels and standards of donor service to ensure consistent quality experiences with the aim of defining a distinctive service standard to which all charities can aspire.

### For senior management and trustee boards, this project will::

- Show why customer service and donor care should be seen as a driver of income and not a cost centre.
- Explain the benefits of setting a customer service vision based on what you want your supporters to feel.
- Show why it pays to encourage complaints and feedback from supporters.
- Help the charity's leadership to be focussed on providing great customer service across the organisation.

### For donors, this project will:

- Increase opportunities for donors to provide feedback and to experience great service when they contact an organisation.
- Set clear expectations of what will happen when they give and that charities' will deliver against the promises they make.
- Reassure donors that, if they make a complaint, it will be dealt with in a sensitive and timely manner.

## Intro – What’s inside?

How does the Camphill Village trust get an over 60% response rate from their Christmas appeal? What is the critical question that Cancer Research UK asks its supporters before developing any fundraising project? What is the culture within Haven’s Hospice that led to a £3 million legacy? Read on to learn how organisations create a culture that provides exceptional supporter service, leading to a better supporter experience.

## The approach?

A request for people to participate in this project was made through those who signed up to the Commission on the Donor Experience website and through the LinkedIn Supporter Care forum. Interviews with those who contributed to this paper were conducted throughout 2016.

## 1. Summary guidance

### Why bother?

The customer's experience now matters more than at any other time. Why? Anyone can share their experience – both good and bad. Think about Amazon reviews or Trip Advisor, or simply sharing your experience on Twitter or Facebook. If this applies to the commercial world and their customers, then why not for charities and their supporters?

A customer's experience can now impact on an organisation's reputation. Your reputation after all is what other people say about you.

It goes further. Increasingly in a world with an abundance of information, we value the opinions of sources we trust to help filter information out and help us make choices. These could be friends or colleagues, or simply other customers or of course, donors.

Again, reputation really matters.

How can charities deliver a great 'customer experience' and a responsive 'customer service' such that it helps build their reputation, results in inbound leads from referrals, and encourages 'customers' to return? Customer service is now totally strategic as part of raising funds on a sustainable basis. This is not about satisfying the donor and meeting their expectations. This is about wowing donors plus going beyond them and dealing with those times someone is dissatisfied in a way that does not damage your reputation.

### A note on language

Should we use the term customers, donors or supporters? With many causes, donors can also be beneficiaries. 'Customer service' cannot be seen in isolation, i.e., just focusing on donors, so we have adopted the term 'supporters' to cover anyone who has an interest in your cause/services – including donors, prospects, campaigners and beneficiaries.

Your charity may have a single individual who deals with supporter care, an entire team or a department. It may just be a shared responsibility amongst the few staff you have. The principles outlined here can apply in all of these situations. We have assumed that you have a Supporter Care or equivalent team but appreciate this will not always be the case. When we use the term 'team' we mean everyone who has a direct part to play in providing the service to your supporters. See CDE project 01 *The use and misuse of language*.

## The challenge we are addressing

Creating a culture that delivers a great experience or service for supporters means creating a culture that delivers a great experience for anyone who contacts you – even if it is a complaint. Think of a time you made a complaint to a shop that was dealt with so well you felt even better about them!

As this is now of strategic importance—because of the impact it can have both on your reputation, retention of donors, and even attracting new ones—it needs to be front line and a priority. Supporter care is often parked to a role or a team. Its function is often very efficient, such as processing donations, but often not influential. And yet it can play a critical role in feeding back to the organisation what supporters are thinking and feeling. Perhaps if charities had effective ways of listening to donors they might recently have picked up on some donor concerns more quickly? Delivering a great supporter experience must not be seen in isolation—it now needs to be something the entire organisation is aware of, values and takes responsibility for, alongside a team or role assigned the title, ‘supporter care’. Hence it needs to be part of your organisation’s culture.

The challenge is how to create a culture throughout the organisation that results in an outstanding level of ‘customer service’. This of course includes responding to donations – but also extends to requests or enquiries that are not straightforward, and any interaction with potential supporters.

## 1.1 Principles

These are the key principles that we recommend if you want to create a culture of exceptional service that helps to deliver a great supporter experience.

### Principles:

1. Customer service and care **now really matter** – anyone in your organisation who could interact with a supporter (just about everyone) needs to understand this. So, you need a vision to work towards and ways of reminding staff about its importance.
2. You need to be **constantly learning** – and that means listening to your supporters, encouraging and responding to feedback that will help you improve and ensure that your vision matches their needs.
3. Your responsiveness and how you make people feel from the experience you provide **needs to impress** ‘the customer’, not just satisfy them. The way to achieve this is step by step.

Look after your supporters and they will look after you

*“A lady phoned about looking after sheep. We did not fob her off. We were tenacious in finding someone who could help although it was not an area of knowledge for us. She left us £1 million in her will.”*

Phil Young, RSPB.

## 1.2 What can I do straight away?

These are the steps to start implementing right now.

### 1. Understand and explain WHY supporter service is now critical and strategic.

First it is key to get across why supporter service now matters to the leadership of the organisation: not just to mitigate bad press and to handle complaints, or even because it is the right thing to do (which of course it is) – but also for the strategic reasons outlined above.

Back in 2005, Sargent and Jay's report, *Redefining Commitment*, concluded that quality service leads to greater commitment from donors.

*“To summarise – donors who share the beliefs of the charity and express higher levels of satisfaction with the quality of service provided to them are significantly more likely to express higher levels of active commitment. Similarly, the factors multiple engagements, trust, learning and personal link all have a role to play in fostering active commitment.”*

*Redefining Commitment, Sargent and Jay, 2005*

### 2. Create your vision and turn it into action.

Identify all the key roles that are critical to delivering a service culture and work with them to create a vision. This includes any staff that answer the phone, your supporter care team, those that deal with inbound digital communications, and those involved in outbound communications. Create your vision of what you want your supporters to feel because of the service culture you provide. Then start to unpack what that means in terms of everyday actions. As a starting point you could use the service standard we have provided in the Appendix.

#### a. Set yourself targets that will help to achieve the vision.

Set the targets you need work to that will deliver the level of excellence you aspire to in your vision. What are the important metrics that you want to fulfil? Do you want to send thank you letters within one day or three days? How quickly will you answer a complaint? How quickly will you answer a query not directly related to your work? Again, over time you can ask supporters what they want and capture feedback as you go. Discuss whether it is better to send a quick reply or take a bit of time and make it more personal. Create wow...but not within expectations. You now need to go beyond them!

#### b. Create a set of values and display them proudly.

Agree with your team on a set of values that you can live by. You can change them and refine as you go along, but your values start to make it quite clear what you should do and should never do. For example, Hope and Homes for Children have the values: excellence, integrity and courage displayed on every wall; UNICEF's Supporter Care team's values are choice, recognition and voice.

#### c. Link your vision, targets and values to actions.

Visions, values and targets you have set are meaningless unless you determine what they mean in terms of actions you commit to do. Translate those values into actions and check back against your vision. For example, if 'choice' is a value what does that mean for what you offer supporters?

### 3. Share your 'bright spots'.

What examples do you already have of superb supporter care or service? Ensure you capture and share them in a regular email circular, staff meetings and inductions. Consider keeping a library of great moments and use these to define those elements of excellence.

### 4. Think like a supporter.

Today, you can start to ask, "What would this look like to a supporter?" and put your answer into practice. Better still, have a particular supporter in mind. Consider giving him or her a name and get staff to ask, "What would xxxx think?". For example, this could help you determine whether you are sending out too many emails, or even whether you are communicating enough to supporters.

An effective way to do this is to introduce simple every day memorable reminders of your supporters. Crisis simply imagine that a supporter is in the room for everything they do.

### 5. Proactively seek regular feedback from supporters.

It is critical to ensure that you have a constant feedback loop so your level of service is constantly improved. Determine all the ways you can constantly encourage feedback from supporters where possible. Invite supporters to communicate on what they thought of your last mailing or email. Better still ask them WHY they donated to you at the time they give? Ask them if they are happy with the communications they receive. Use this feedback to inform how you behave and what you change; share the feedback with your supporters, together with how you have responded, to show that you have listened.

### 6. View complaints as another opportunity to impress.

Logically, if a customer has no reason to complain, their loyalty might increase. Conversely, if they have one or more reasons to complain, we might assume that their loyalty might decrease. However, a wide body of evidence shows that where a customer has complained and received a proper response, they will become more loyal than if the problem had never arisen.

### 7. Deliver wow thank yous.

A thank you is the one communication you can almost be certain will be read. So, it is worth putting in some effort to help make it something memorable that supporters enjoy receiving. For more guidance, please refer to CDE project 4 - *Thank you and welcome*, compiled by John Grain.

### 8. Read about what works.

The following books are simple but inspiring short reads recommended by fundraisers who have contributed to this project. Order the books and circulate them around the team.

**How to Wow:** *68 Effortless Ways to Make Every Customer Experience Amazing* by Adrian Swinscoe. An informative book full of bite-size case studies and tips about how you can transform what you do.

**FISH** A short story about the Seattle Pike's Place fish market, and their customer-focused service culture. There are four key principles: Choose your Attitude, Be Present, Make Someone's Day, Have Fun.

*"Your customers are only satisfied because their expectations are so low and because no one else is doing better. Just having satisfied customers isn't good enough anymore. If you really want a booming business, you have to create Raving Fans".*  
Raving Fans by Sheldon Bowles.

## 1.3 What can I do in the future?

These actions take a little longer and/or need to be done over a period of time

### 1. Invest in resources and people.

Most charities have not traditionally invested sufficiently in customer (i.e., donor) care. This culture has to change. For this to happen, charities have to recognise that supporter care is an investment that repays handsomely in donor satisfaction, retention and future giving. Consider investing more resources, expertise and experience in your team that deals with inbound supporter communications and care of supporters, due to its strategic importance. This may mean reviewing salaries, and determining what can you put in place that does not just achieve the minimum but goes beyond expectations when someone contacts you. Good customer care staff should be highly valued and rewarded as much as any other fundraising staff.

### 2. Make your 'donor promise' public.

Write a supporter or donor promise—a statement of your pledge to supporters that will hold you to account. The very process of writing it will help you think about the issues. Publish it. It could even be a blog or a communication you send out to supporters (that will ensure you make it plain speaking). Here are some elements that you should consider:

- Be ambitious. Although your supporter charter may state your commitment to following the law and accepted practice guidelines such as data protection it should go way beyond this.
- Demonstrate HOW you are doing what you promise. For example, provide a web link to the part of your site that demonstrates the impact the charity is having.
- Be accessible, for example, consider providing the names of your team members responsible for inbound communications with a photo and details of how to contact them.
- Encourage donors to let you know if something has gone wrong. Give instructions on how to make a complaint.

### 3. Enable everyone to inspire your supporters.

When you interact with supporters, it is an opportunity to talk about your mission. Are staff able to inspire people with the conversations they have? Are they able to tell a story? Ensure that all staff can do this, whether it is through exposure to your projects or engagement with staff responsible for service delivery. For example, encourage staff to visit and immerse themselves in projects to obtain their own stories they can tell personally. Consider providing story telling training to staff. For some examples of how charities approach this, [see the top tips](#) in the next section.

### 4. Share and encourage good practice.

Create opportunities for staff to showcase the level of supporter service they are providing and give them recognition. This could be a simple weekly email shared around the organisation that includes anecdotes of good practice, or inclusion of great supporter service in annual awards or any end of year reflections. Make supporter service a part of annual appraisals – ask for examples where someone has helped to provide exceptional service for a supporter.

### 5. Get input from your supporters.

List all the ways that you can involve supporters and actively listen to them throughout the course of a year. Create structures for speaking to supporters, for example, putting aside a whole day for everyone in the organisation to contact supporters and thank them. Find supporters or board members who will come in and volunteer in your team. Consider involving supporters in your editorial committee for your newsletter or your next appeal by contributing some content. Run annual focus groups so you can have a conversation about your fundraising. Or simply hold a supporter day, a chance they can meet other supporters as well as you.

## 6. Work out your indicators and measure/capture them.

Determine the indicators that will show you are delivering the level of supporter service you aspire to. This will not just be response times to donations, enquiries, and complaints – although response times will be one factor. Consider introducing a way for supporters to rate their experience of interacting with you (as seen on Amazon, or Trip Advisor reviews). Track positive feedback and complaints and benchmark this against previous years and against the amount of activity you do.

Consider measures such as Net Promoter Score as a basis for measuring your level of service. Net Promoter Score asks supporters to rate you on a scale of 1-10 by asking one question:

*“On a score of 0-10 would you recommend our charity to a friend or colleague?”*

For a case example of a charity using the Net Promoter Score along with more suggestions for measures, see CDE Project 3: *Measuring satisfaction and loyalty: How do your donors feel?*

You will also find an [example of how UNICEF monitors complaints and uses this to alter behaviour along with top tips](#) in the next section of this document.

## 7. Go mystery shopping.

At the very minimum, put yourself in the shoes of a supporter and work through each step of making a donation, at each stage asking yourself how it made you feel. Better still, formalise it. Arrange for someone, or several people, ideally outside your organisation, to donate in a number of ways, by phone, online, and by post and get them to record how your organisation responded, what were the first and subsequent communications, and how they felt as a result of receiving them. You could ask friends or family, or even fundraising peers in other organisations in return for you doing the same back, for them.

There are even initiatives that run mystery shopping exercises and will compare your organisation against other similar organisations. You could also ask colleagues who give to other charities to track their responses and see how you compare.

## 8. Plan a supporter journey.

Planning a supporter or donor journey is an effective way to ensure that you have a conversation internally about how you treat your donors after they give.

Remember it is a planning process. People are unlikely to do what you want them to or what you think they will do—but the very act of having the conversation internally will help you prepare.

Fundraisers often think of the supporter journey as the sequence that turns someone from a cash giver to a regular giver and then to a legacy pledger, or it is the sequence of what you send when. It is really neither of these, although both could be outputs or the impact of developing a supporter/donor journey.

A far better way to think about the supporter journey is that it is the **story** you would like your donors to hear. Like all good stories there are different stages, from the opening ‘grabber’ that got their attention and made them first donate, the need for more help when things get difficult, to the final celebration.

For more information on thinking in this way and preparing an appropriate supporter journey see CDE Project 5 - *The supporter journey*, compiled by Morag Flemming