THE ULTIMATE HOW-TO-GUIDE FOR CONDUCTING NONPROFIT DONOR SURVEYS

www.imarketsmart.com

How to use donor surveys to **raise more money at lower costs**

marketsmart

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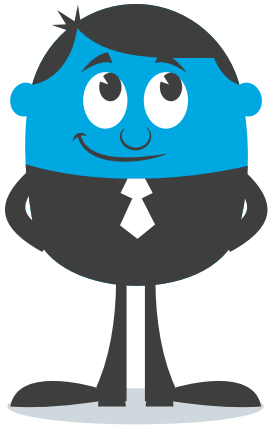


Greg **WARNER**

CEO & Founder

In 2007 MarketSmart's founder, Greg Warner, received a newsletter from one of his beloved charities, which seemingly sought to generate leads for its planned giving department. He decided to call them to see if their impersonal mass-marketing approach was working well. It was not.

So, Greg decided to improve the effectiveness of the charity's lead generation and cultivation efforts with a fresh strategy. After implementing Greg's plan, the organization generated more highly qualified leads—and found more gifts—than it had previously uncovered in any single marketing campaign, ever.

After that initial success, Greg recognized that the greatest transfer of wealth in U.S. history was imminent and decided to act.

He realized that by combining his understanding of high technology with savvy marketing strategies and superior sales skills, he could help non-profit organizations increase the pace and scale of their planned giving efforts.

Today, MarketSmart is a planned and major gift marketing software and services firm that helps nonprofits raise more money more efficiently. The firm's cornerstone engagement fundraising platform uses cutting-edge tracking technologies to help fundraisers zero-in on and effectively cultivate donors that are most likely to deliver large, major or legacy gifts.

We do the marketing. You get the results.

A RIDICULOUSLY BRIEF HISTORY OF SURVEYS

Charles the Great supposedly conducted the first survey around 800 A.D. in Western Europe.

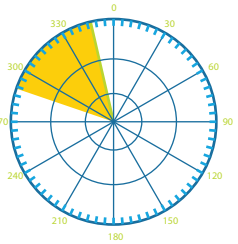
Here are some of the questions the king sought to understand:

- Why are so many men refusing to join the military service to defend the borders of the realm?
- Why are there so many disputes in the kingdom with one party attempting to take the property of another?
- Why are people refusing to offer refugees shelter?

FEEDBACK HELPS US
ADJUST SO WE CAN DO BETTER

FOR INSTANCE:

A captain on a ship uses **feedback** to alter course



Children in school get **feedback** in the form of grades

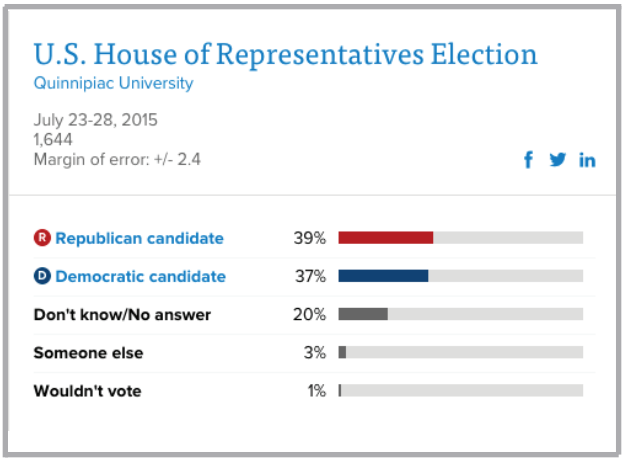
Employees get **feedback** from reviews

Politicians get **feedback** from constituents

3 MOST POPULAR WAYS TO GET FEEDBACK

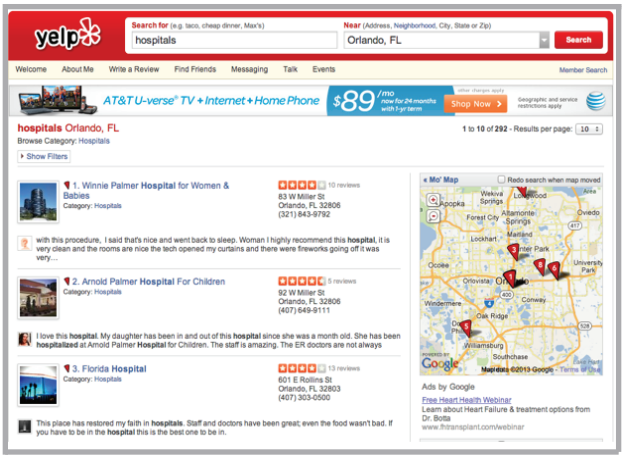
POLLS

Provide quick insight into one specific question



REVIEWS/RATINGS

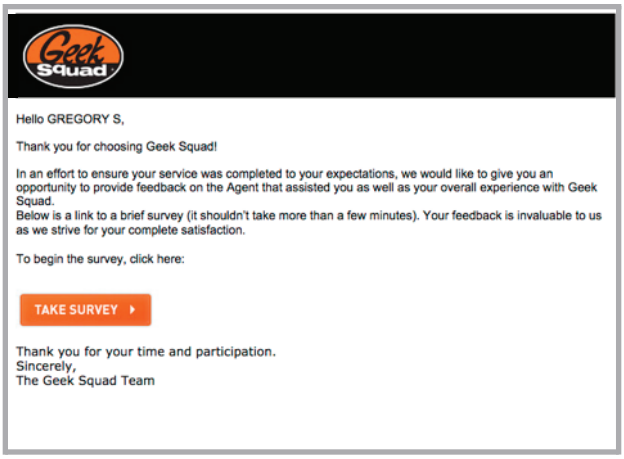
Provide feedback on a specific idea, concept, product, or experience



Our favorite

SURVEYS

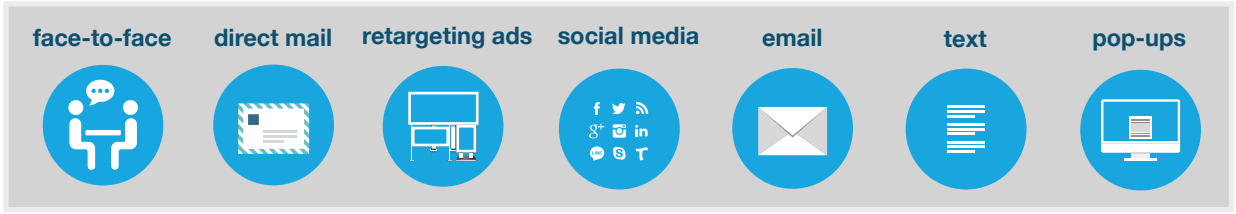
Provide feedback with information that can be used for prioritizing and/or targeting your marketing efforts so you can be more efficient and more effective



7 POPULAR SURVEY CHANNELS

$$$ How do they compare in costs? $

face-to-face | direct mail | retargeting ads | social media | email | text | pop-ups



Which ones are faster/easier VS. slower/harder to conduct in mass quantities

email | social media | retargeting ads | pop-ups | text | face-to-face | direct mail

SMART TIP

Choose low-cost channels to make sure you are happy with the results before spending too much on hi-cost channels

7 REASONS
WHY PEOPLE TAKE SURVEYS

1. Interested in the topic

2. Curious about what questions they'll be asked

3. Have affection for the company or organization asking the questions

4. Want to shape organization to their liking

5. Want to be heard

6. Want to reciprocate (especially if they are offered an incentive to participate)

7. Simply want to be helpful

WHY SURVEYS **ARE SO POWERFUL**

YOUR SUPPORTERS LIKE SURVEYS **YES! THEY REALLY DO LIKE THEM**

Why? Because they can...

- Engage, get involved, give feedback, enter into a two-way conversation, feel that their input counts

- Tell nonprofit about preferences (time of year to be asked for a gift, what they like/don't like or want/ don't want)

- Tell your nonprofit why they care (Charity is a form of extended family. Supporters want to "talk it out" with their favorite charities i.e. - I care because my mother had breast cancer)

- Tell your nonprofit how they might consider helping the cause (by getting involved, donating jewelry, making a gift in a will, etc.)

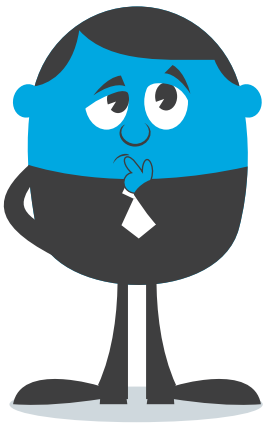
WHY SURVEYS **ARE SO POWERFUL**

HOW YOUR NONPROFIT CAN BENEFIT FROM A DONOR SURVEY

1. Raise money (YES! Survey respondents will actually give more)	✓
2. Identify your 80/20 and zero-in on your best major or planned gift opportunities by analyzing the key traits of your most profitable donors	✓
3. Find new volunteers, reengage alumni, and reinspire past donors	✓
4. Recruit leaders for Board positions	✓
5. Find new major donors via referrals from passionate supporters	✓
6. Make your supporters feel valued and appreciated because your organization actually sought their opinion	✓
7. Get feedback on ideas, initiatives, concepts, or policies	✓
8. Measure donor satisfaction and interest in particular giving opportunities	✓
9. Establish benchmarks so you can monitor trends	✓
10. Clean up your list	✓
11. Capture demographic information you simply cannot buy	✓

7 REASONS WHY MANY NONPROFITS DON'T EMPLOY SURVEYS

1. Don't know what questions to ask and/ or what specific words work best
2. Don't know how to design a survey that will get a high completion rate
3. Don't have the time
4. Don't have the expertise to ensure that your supporters' feathers won't get ruffled
5. Don't have the technological capabilities
6. Don't want other departments to get involved
7. Don't want to start office drama/politics



WHAT'S STOPPING YOU?

THESE FOLKS KNOW
WHAT THEY ARE TALKING ABOUT

> Surveys can also give you amazingly useful info on why your donors are motivated to give to you

Gail Perry
Fundraising Author, Speaker, and Consultant

> Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves.

Steve Jobs
American information technology entrepreneur and inventor

> Intelligently crafted donor surveys speak truth to delusions. Donor surveys are the thermometers of fundraising. Surveys can tell us whether donor sentiment is running hot or cold, positive or negative.

Tom Ahern
Fundraising Author, Speaker, and Consultant

> In good times and bad, we know that people give because you meet needs, not because you have needs

Kay Sprinkel Grace
Fundraising Author, Speaker, and Consultant

LET'S GET TO WORK!

HOW TO GET THE MOST OUT OF YOUR SURVEY EFFORT

1. Be strategic

Set a clear goal for your survey by considering:

a. Why are you doing it?

b. What do you aim to accomplish?

c. Who are the stakeholders?

d. What will you do with the information?

2. Be donor-centric

- Limit the number of questions

- Only ask questions that are absolutely necessary to attain the objective

- Be honest and up-front

  For example:

  Let your supporters know up-front how long it will take (be realistic)

- Use simple words and short sentences (avoid jargon and long paragraphs no matter how highly educated you think your audience is)

- Design it so it's easy to complete on desktop, mobile or tablet devices and in print

- Always use big fonts in dark colors on light backgrounds with easy-to-click buttons

- Make sure the flow seems logical

- Allow supporters the opportunity to come back to an incomplete survey using cookie-based tracking technologies

  NOTE: Only MarketSmart employs this technology

HOW TO GET THE MOST OUT OF YOUR SURVEY EFFORT

2. Be donor-centric (Continued)

- Put related questions in groups and describe what those groups are

- Employ a progress bar so people know how many questions they have answered and how many remain

- Avoid "requiring" questions to be answered before continuing unless absolutely necessary

- Use mostly closed-ended questions so your donors don't have to think too much

For example: In the case of a hair salon...

GOOD

Which of our services do you use?
o Massage
o Hair Stylist
o Nails

BAD

What do you like about our salon?

NOTE: You may use open boxes for elaboration but do so sparingly since long-form answers require more thought, energy and time

3. Ways to increase your completion rates

- Tell them why you need their input and explain how your organization will benefit in a way that also benefits the respondent

- Explain why you selected the respondent to answer the survey

- Tell them that their opinion matters and could make a difference

- Start with easy and interesting questions to get them in the groove then progress to greater complexity (but never too challenging!)

- Use the word "you" to emphasize that you are focused on them

- Create a sense of urgency by mentioning that you need their response by a specific date

- For sensitive questions, be sure to explain why you are asking the question and provide options so your supporters don't feel boxed-in

For example:
☐ Not applicable
☐ Prefer not to answer
☐ Comments

HOW TO GET THE MOST OUT OF YOUR SURVEY EFFORT

3. Ways to increase your completion rates (Continued)

- Make sure your survey is branded so your supporters feel that it's trustworthy and credible

  NOTE: Services such as Survey Monkey can't do this and using low-end services will result in drastically reduced completion rates

- Include your contact information so they can reach out to you directly (phone & email of a real person along with a link to your website)

- Include your privacy policy (especially as it relates to the information you are collecting)

- Wait to put any demographic check boxes near the end

- Employ back-end form filling to get them to hit "submit" (In other words, fill the last page with information you already know about them such as name, address, phone number, email address, etc. Do this so that they don't have to spend time typing in all of the information you already have/should already know)

  NOTE: MarketSmart employs this technology for clients

- Allow them to update their contact information so your follow-up outreach is successful

4. Before the survey

- Prepare for the responses

  - Train staff (create cheat sheets for what to say to whom based on the response you might anticipate receiving)
  - Involve departments (let everyone know what's happening so they aren't surprised by calls or emails)

HOW TO GET THE MOST OUT OF YOUR SURVEY EFFORT

5. After the survey

- Provide valuable offers to the respondents. Make sure that they are relevant and personalized based on their needs and desires described in their responses (this is done most easily online).

  For example:

  Provide opportunities for respondents to sign up for newsletters and/or alerts

  Help them send a letter to their Congressman

  Allow them a chance to donate immediately or through their Donor-Advised Funds)

  Offer information (eBooks or downloads) that align with their self-described desires

  Give them a chance to share their story with you, or spread information about your mission

- Respond to everyone but prioritize them by first reaching out to the people who seem to have issues or problems that need to be resolved right away

- Analyze the data to determine whether or not your survey helped you achieve your strategic objectives

- Determine the next steps!

- Set meetings with passionate, high-capacity prospects and planned giving leads

- Steward new Legacy Society members

- Reach out to referrals

- ENGAGE !

BONUS

FREQUENTLY ASKED QUESTIONS

Q1: What information can major and planned gift fundraisers attain from surveys that cannot be provided inexpensively or at all otherwise?

A1:

- Childlessness
- Self-reported age
- Donor Advised Fund ownership
- Complaints/Discrepencies a donor may have with your organization
- Interests, passions, desires
- Updated contact information
- Insights into emotional triggers
- Names of people your supporters might want to memorialize or honor with a gift
- Etc

Q2: What should be done with the information?

A2:

- Update your records! This is the cheapest way to clean up your list
- Engage with your supporters. Show 'em that you care
- Take note of complaints and deal with problems head-on
- Personalize your future outreach so you show 'em that you know 'em
- Spot trends in the results
- Share results with others (possibly to realign budgets in your favor)
- Call them, meet with them, and offer them opportunities to give or get involved

BONUS

FREQUENTLY ASKED QUESTIONS

Q3: What if we are concerned that we won't get enough responses?

A3: Don't worry… you will! In fact, your supporters are wondering right now why you haven't asked for their opinions. And, they are giving more to the nonprofits who are already surveying their interests and desires.

Q4: What if we are concerned that we'll get too many responses?

A4: This is certainly a good problem to have and one that our clients experience frequently. Don't be concerned about too many responses. It's never a bad thing. Just make sure you are well organized, and your methods for tracking data are efficient. Contact us and we will show you our automated cultivation system!

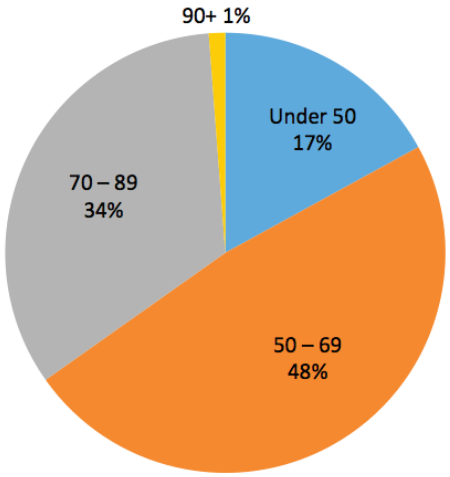
Q5: How often should we survey?

A5: You should survey your donors at least every 12 months (yearly). However, you can continue to reach out to non-responders several times a year (people get really busy and intend to take the survey later but forget)

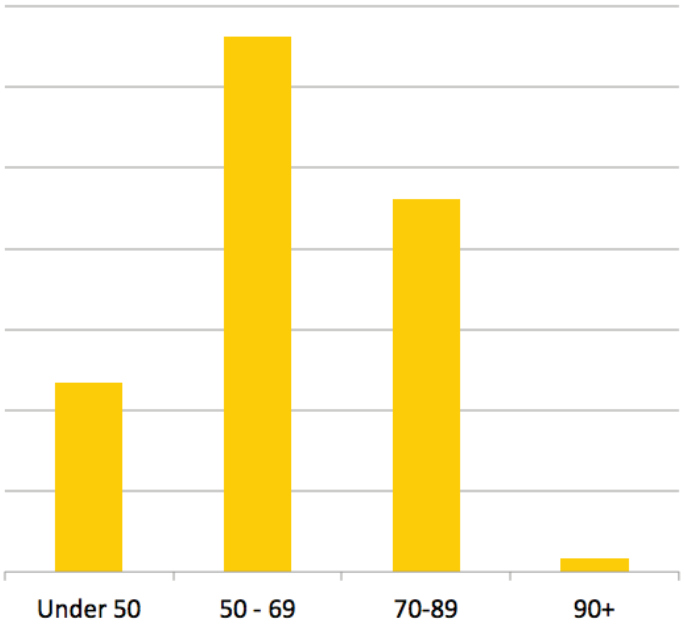
BONUS

CASE STUDIES

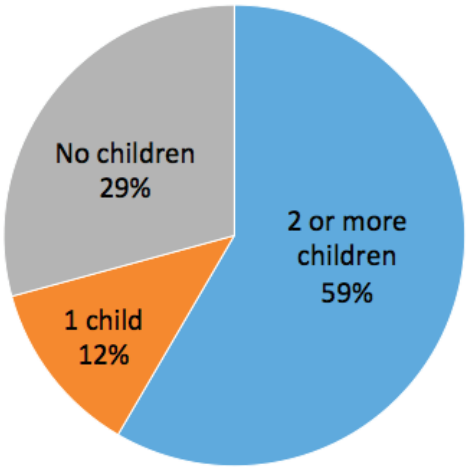
Respondents with a Donor Advised Fund

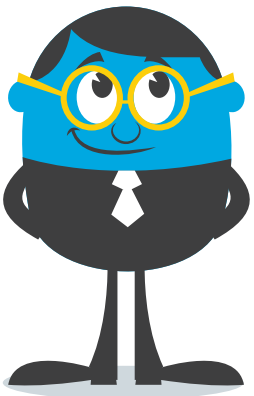


Respondents by Age



Respondents with children





SOLUTIONS

surveygiftmaker®

Generate more major gifts and uncover previously undisclosed planned gifts with donor surveys.

majorgiftmaker®

Find passionate donors in real time, and close more major gifts — faster. MajorGiftmaker gives you a 360° view of individual donors' interests, demographics, and preferences.

giftmakerconnect®

Donors want to give where they live. With GiftmakerConnect, you can tap into the power of smarter fundraising by connecting the disconnected and empowering your chapters or affiliates.

legacygiftmaker®

Generate more leads, cultivate more donors and find more legacy gifts. Individual tracking reports show who is interested in your organization and why, so you can engage and build effective relationships with potential donors.

giftmaker+®

Take the guesswork out of marketing by using proven technology to rank, score, and automatically nurture leads with relevant, timely, personalized messages. You'll maximize your gift disclosures by spending your time with the most qualified and interested donor prospects, and letting Giftmaker+ take care of the rest.

Feel free to request a demo today!

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