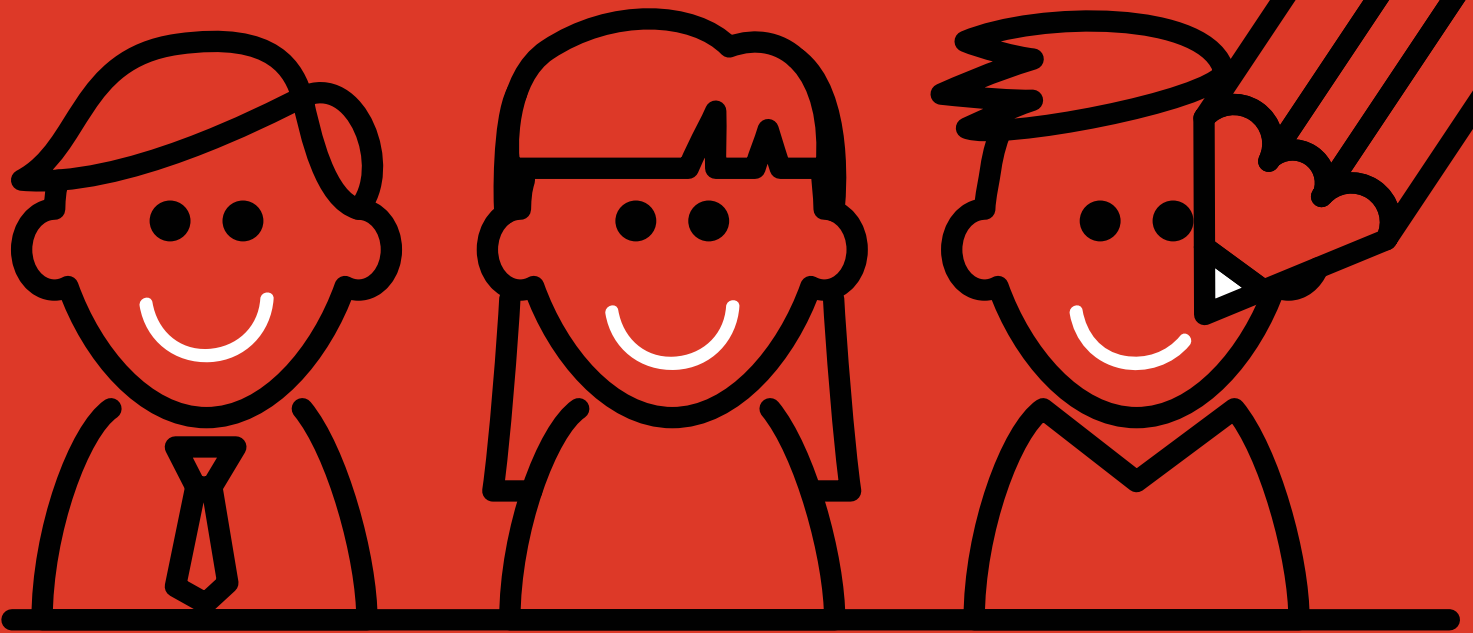


Whose ~~Line~~ Customer is it Anyway?

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# A NONPROFIT'S GUIDE TO Customer Service



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# Introduction

You've probably noticed that this isn't called "A Nonprofit's Guide to Donor Stewardship," even though that's an accurate title. Donors, however, will encounter your organization with expectations formed by traditional customer service experiences. If you want to keep your donors, you need to know how to satisfy them.

In this guide, we want to explain donors' expectations and desires and how nonprofits can fulfill them. To start with, we'll go over the fundamental difference between the for-profit customer relationship and the non-profit donor relationship.

From there, we'll explore how to attract new donors, guide them through the giving process, and deliver the gratitude and ongoing engagement that will make them lifelong supporters of your organization.

We want to be clear in saying that nonprofits shouldn't think of donors as nameless, faceless customers waiting to spend money. Nonprofits are not department stores, but understanding the motivations and expectations that consumer culture has fostered will help organizations create a positive giving experience.

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<sup>1</sup> The Fundraising Coach. "[Guest Post] Why Donors Stop Giving." <http://fundraisingcoach.com/2013/04/15/guest-post-why-donors-stop-giving/>

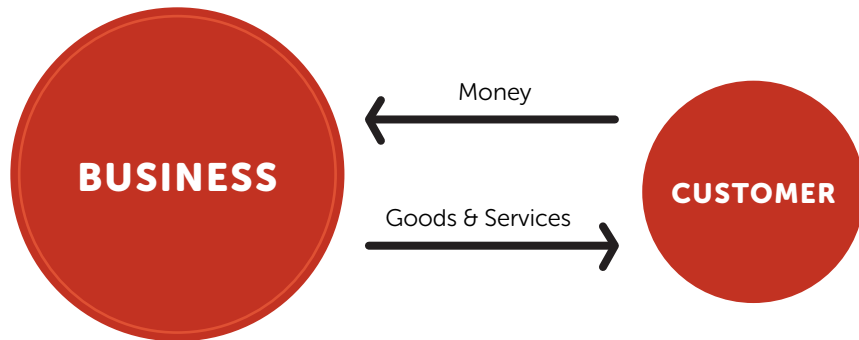
# Chapter 1

## Who is the customer?

Before we start thinking about how to deliver great customer service, we need to establish who our customer is. In other words, we need to clarify the relationship between a nonprofit organization and its donors.

### Nonprofits Must Deliver More

Let's take a look at the exchange that occurs in a conventional sale between a for-profit business and a customer. The customer gives a type of value (money) to the business. The business transfers another form of value (goods or services) to the customer.



This is a simple exchange between parties; money goes one way while goods and

services go the other way. In this scenario, the business' focus is on turning the one-time customer into a repeat customer; this makes customer service a pretty obvious priority.

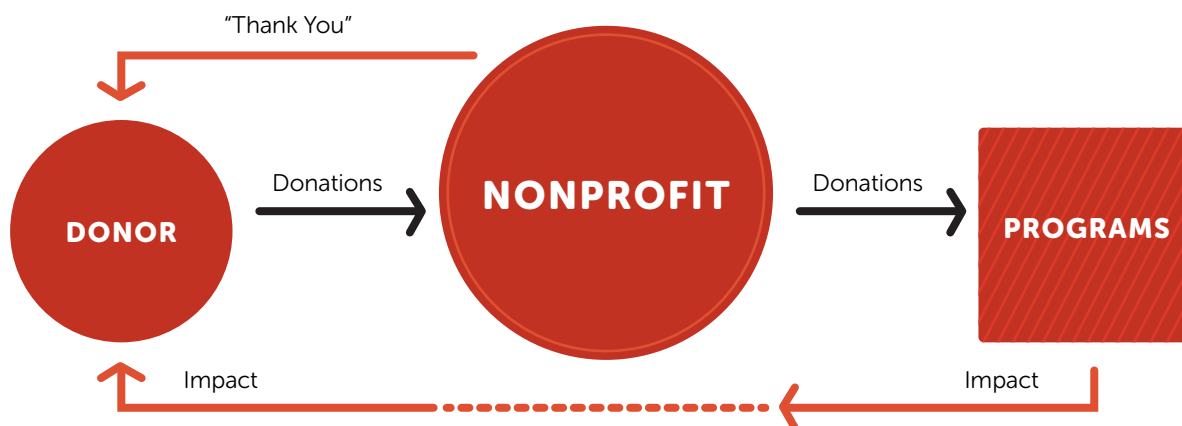
The relationships around nonprofit organizations are more complex. Although most nonprofits get revenue from multiple sources, the vast majority of that revenue (around 70%) comes from individual donations, which we will focus on here.<sup>1</sup>

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<sup>1</sup> Giving USA Annual Report. <http://www.givingusareports.org/>

The typical scenario begins with the donor, who gives some value (money or in-kind goods) to the organization. Instead of delivering a good or service back to the donor like a business does, however, the nonprofit takes the donor's investment and directs it toward fulfilling its mission. Whether it spends the money on feeding a hungry person, building a well in a water-starved village, or investing in critical infrastructure, the basic point remains the same—the money is spent on providing a good or service to *someone other than the donor*.

Because donors don't receive the direct material return that customers do, communicating and engaging with donors becomes critically important to retention efforts. **In many ways, donor stewardship is the nonprofit equivalent of customer service, only it's made more important by the absence of a tangible benefit.**



Nonprofits are (rightly) focused on solving the social problems that are encompassed by their missions, but that doesn't change the fact that their work almost always requires significant funding. Organizations cannot focus on programs and impact to the exclusion of donor stewardship. Without donors, many organizations wouldn't be able to create programs or impact.

All of this is to say that nonprofits generally have it harder than businesses. A business needs to focus on creating a great product or service for its customers and then use communication to augment the value created by that product or service (e.g. customer service).

Nonprofits, on the other hand, focus on creating a product or service that achieves measurable impact (**its programs**) while at the same time prioritizing and managing a system of communications and engagement to a separate audience of funders (**donor stewardship**).

## The Donor as Customer

We are approaching donor stewardship through the lens of customer service because, like traditional customers, donors' patronage is what sustains an organization. Donors, however, don't receive an immediate, tangible product for their investment. This makes a good relationship between nonprofit and donor even more important.

So, if we're thinking of the donor as a nonprofit's customer and how best to serve them, we need to know what donors want. A number of donor surveys have asked just that and the results are clear.<sup>2,3</sup>

### WHAT DONORS WANT

- **To be thanked sincerely**
- **To receive impact stories showing the results of their gifts**
- **To make measurable change**

All these factors contribute to making the donor feel good about their decision to give. This is an ongoing process, beginning when a donor first encounters your organization. As we move through this guide, we'll look at how to provide the best service and satisfaction every step of the way.

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<sup>2</sup> The Cygnus Donor Survey: Where Philanthropy is Headed in 2011. [http://www.cygresearch.com/files/free/US-2011-Cygnus-Donor-Survey\\_Report-Executive\\_Summary.pdf](http://www.cygresearch.com/files/free/US-2011-Cygnus-Donor-Survey_Report-Executive_Summary.pdf)

<sup>3</sup> The Able Altruist, "How to Turn One-Time Donors Into Repeat Donors." <http://able-altruist.softwareadvice.com/how-to-create-repeat-donors-0214/>

# Chapter 2

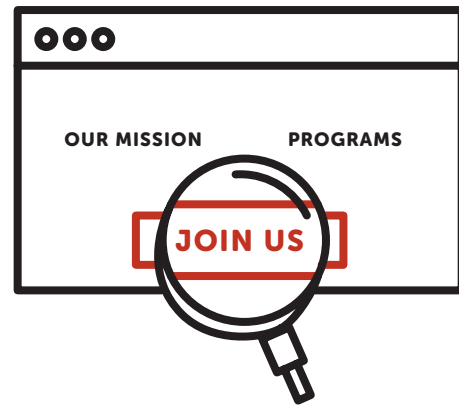
## Capturing donors

So how do you apply customer service principles to the process of attracting new donors to your organization?

One of the most important steps is to create a donor-centered path to involvement. **In other words, when someone visits your website, social media pages, or encounters your staff at an event, you need to make it easy for them to get involved.**

### A Hard Look at Your Homepage

When people first encounter your nonprofit, they'll very likely check out your website's homepage. If they hear you mentioned in conversation or a friend is fundraising for you, they might go home and Google your organization. Hopefully your site will be at the top of the search results!



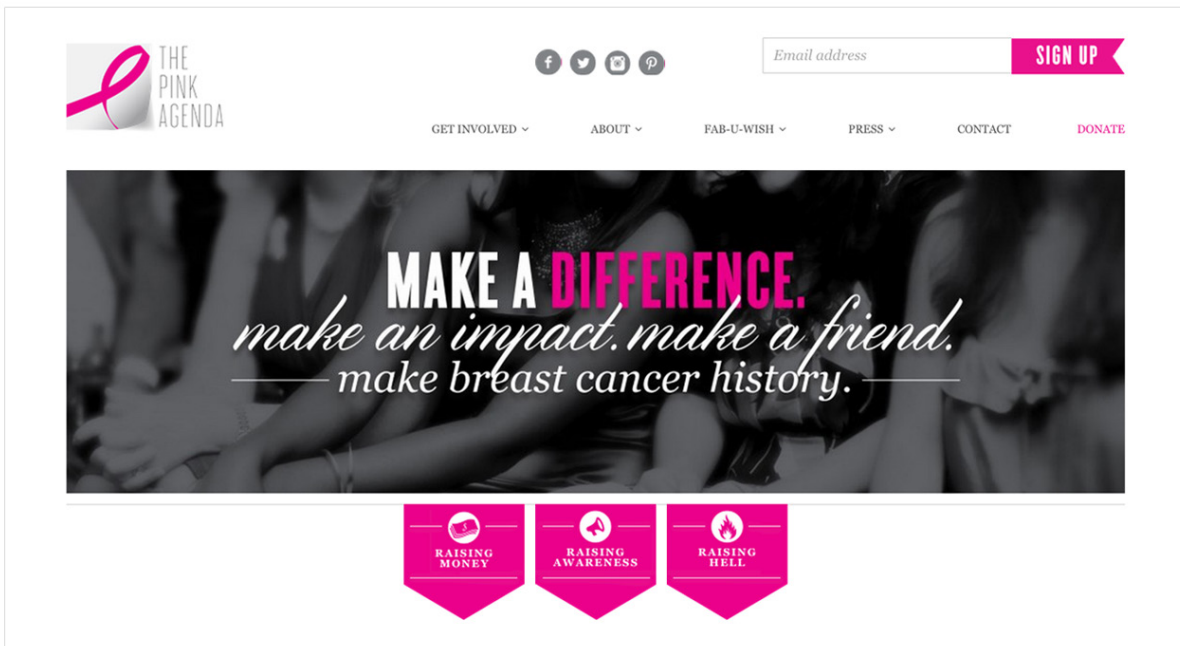
Most nonprofits do a great job of making their mission and programs obvious on their homepage. While this is important, it is not enough to simply tell potential donors what you do, you need to invite them along for the ride.

Asking people to get involved with your cause is a lot like an everyday conversation.

If a friend texts you and asks what you are up to today, you'll likely tell them what you're doing. You'll also ask them what *they're* up to and whether or not they'd like to get together. This, of course, leads to **plans**: coffee, the movies, a stroll in the park – all the good fun of company! Hopefully, you enjoy yourself more than you would alone.

Similarly, if your website doesn't address the reader directly then they may not realize you need their help. Maybe they will assume you get by on grants and major donors. Sure they are more informed about your organization or your cause, but you may be missing out on a new donor or fundraiser.

It's better to show how your audience can be a part of championing your cause.



The Pink Agenda's homepage prominently features fundraising and ways to get involved.



You should still feature your impact and the people you help, but to grab the attention of potential donors you need to address them directly.

One great way to do this is by putting a fundraising leaderboard on your homepage or creating a section where donors explain why they give.

Beyond the homepage, your website should also have “Donate”

and “Fundraise” call-to-actions and a “Get Involved” tab that goes into detail about the different ways to help. You can then link to this tab in your social media profiles.



**I donate because...**

*“...I have seen and experienced firsthand the great work that CDF does to build co-operatives and communities in other parts of the world and I wanted to personally help with that development.”*

**Meet Jacob Nichols >**



**I donate because...**

*“...it supports co-operative development in Canada and abroad.”*

**Meet Julia Sims >**

## What Donors Want to Know

Some donors will be comfortable giving after taking a quick look at your mission or simply because they want to support a friend who is fundraising. Others, however, are much more thorough in their research. This may be because they want to invest their money wisely or simply are more suspicious of charitable organizations.

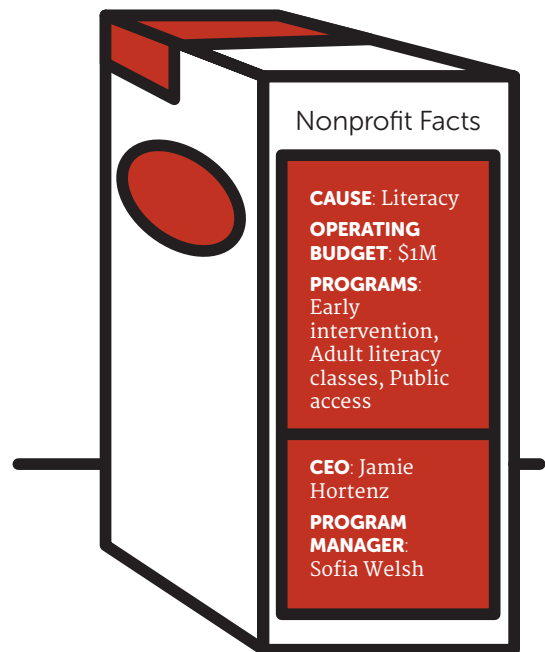
It’s comparable to when people sit down to eat at a restaurant. Some diners simply choose the special or the first menu item they see. But others scour the whole menu and ask questions about ingredients, preparation, and flavor.

Servers love the first type of guest, but they can't afford to ignore the second type. If someone with a dairy allergy asks about a certain menu item, the server is expected to find out if it contains allergens. It is even better, though, if this information is readily available to the diner.

Some donors won't be ready to give until they have certain details. Your nonprofit needs to be prepared for direct questions (by phone, email, or social media), but it will save you trouble if your website and communications are open and transparent. Make sure your website is ready for any discerning donor by adding the following:

- **Street address, phone number, email address**
- **Board members and primary staff**
- **Mission and programs**
- **Annual reports**
- **Financial documents, including your most recent 990 form**

This information won't be viewed by every donor, but it is still important to make it available. Most people don't read all the ingredients before buying a box of cereal, but we all expect to be able to find them.



# Chapter 3

## Clearing the path for donation

Have you ever abandoned your shopping cart?

Just decided you didn't really need all the things you picked out from the store or you were too annoyed by the crowd. Did you ever just leave your full shopping cart there and walk out?



This might sound strange, but people do it every day. We just can't see it because so much of it happens online. Business Insider estimates that \$4 trillion of merchandise will be abandoned in online shopping carts this year.<sup>4</sup>

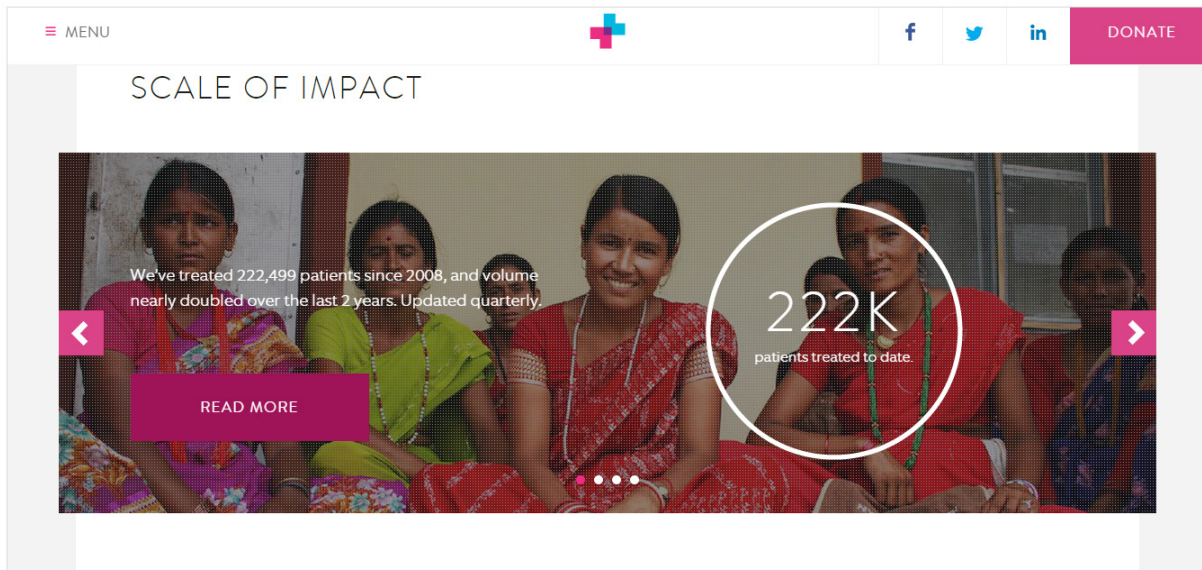
People aren't shy about beginning an online transaction and never finishing, so nonprofits need to make their online donations process as simple and intuitive as possible.

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<sup>4</sup> Business Insider, "Shopping Cart Abandonment: Online Retailers' Biggest Headache is Actually a Huge Opportunity." <http://www.businessinsider.com/heres-how-retailers-can-reduce-shopping-cart-abandonment-and-recoup-billions-of-dollars-in-lost-sales-2014-4>

## The Call-to-Action

Once people know your organization wants their help, you have to show them the next step. You can do this by making sure visitors to your website always have easy access to a CTA button. They shouldn't have to navigate to your "Get Involved" tab to find a "Donate" button.



Even if you scroll down Possible Health's homepage, the "Donate" CTA stays visible in the top-right corner.

You can also include CTAs in emails and social media posts. Just remember that most of your communications shouldn't be overt asks.

### Tips for Killer CTA Buttons

- Have a "Donate" button and a "Fundraise" button.
- Link CTAs directly to the appropriate form.
- Make buttons a color that stands out on your web page.

## The Shortest Path

Some people enjoy flying, some get nervous at the very thought, but everyone hates layovers. There's a reason many people are willing to pay for a direct flight: they don't want to spend the time and effort navigating through different stops on the way to their destination. That's why you should give donors a direct flight whenever possible.

If a donor clicks on a CTA, whether it's to donate or to fundraise, their next stop should be the form. This person has clearly indicated their interest in getting involved, so don't waste more time trying to convince them. Every page they have to visit before completing their transaction is a chance for the donor to get distracted, to second-guess, and to abandon their cart.



## YOUR ITINERARY

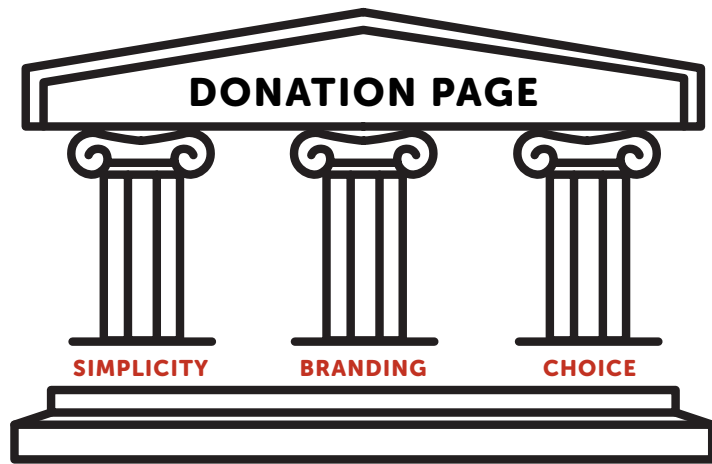
### CTA TO DONATE



## The 3 Pillars of a Great Donation Page

You're so close to the finish line, so stay focused!

Your donation page is the most important interaction you will have with donors up to this point. Optimizing your donation pages is one of the most important steps to creating a great donor experience.



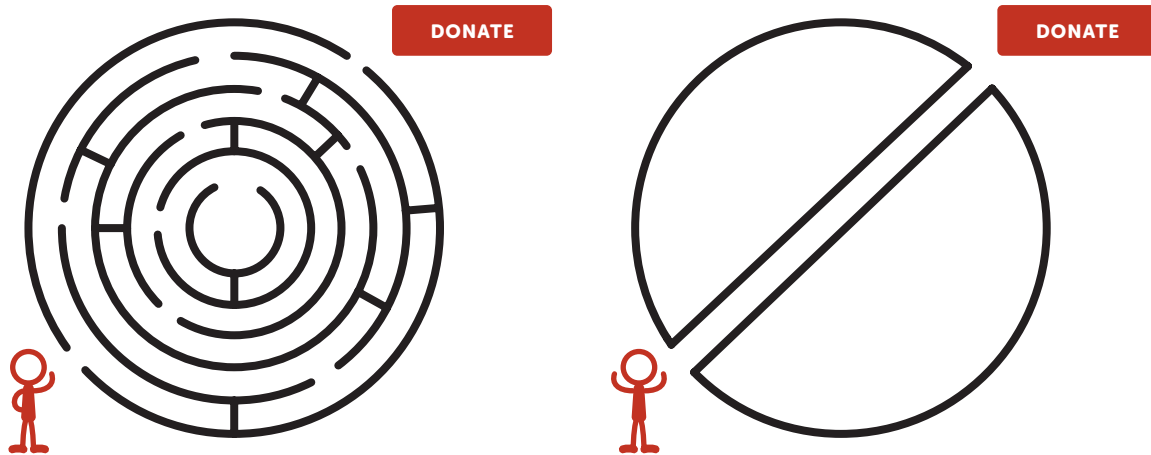
There are three main things to consider when designing your donation pages (yes, you should have more than one).

### 1. SIMPLICITY

**Priority #1. Make sure people will get through your donation page!** Keep the form short and eliminate distractions.

When it comes to the actual information the donor needs to type in, less is better. You can always reengage or survey donors later, but for now all you really need is their name, billing information, and email address. You can add one or two other questions, but your goal is to make donating as easy and painless as possible. Remember, every extra step in the process could be the one where a donor gets impatient or distracted and leaves the page.

**Priority #2. Limit external navigation!** If someone reaches your donation page, consider excluding a menu bar or links to other parts of your website. The only button you want them to click is the “Donate” button. Making a donation should be a straight shot to the finish line, not a complex maze.



## 2. BRANDING

Anyone who looks at your donation page should be able to tell what organization stands behind it.

**Carrying over your branding, messaging and imagery to the donation page maintains all the emotion that motivated site visitors to donate in the first place.** It also reassures them that their money will go where they intended.

If that doesn't convince you branding is worth your time, take a look at these statistics.

- Branded donation pages raise **6x the amount** that generic pages do.<sup>5</sup>
- The average donation to a branded checkout page is **38% larger** than that of a generic page.<sup>6</sup>

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<sup>5</sup> Nonprofit Tech for Good, "14 Must-Know Stats about Fundraising, Social Media and Mobile Technology." <http://www.nptechforgood.com/2014/06/08/14-must-know-stats-about-fundraising-social-media-and-mobile-technology/>

<sup>6</sup> Network for Good, "The Digital Giving Index." [http://www1.networkforgood.org/sites/default/files/images/digitalgivingindex\\_2012\\_v2.jpg?v=234243](http://www1.networkforgood.org/sites/default/files/images/digitalgivingindex_2012_v2.jpg?v=234243)

- Donors who give through a branded checkout page are **66% more likely** to make a second gift through your website.<sup>7</sup>

That's right, donors give more and tend to give again when the donation checkout page is branded.

possible **+** "Making healthcare possible in the world's most impossible places."

## Invest in Possible

**Select an Amount**

Your Donation \* \$  USD  One-time  Monthly

Would you like your employer to match?

Dedicate my donation in honor or in memory of someone

**Your Information**

Name \*

Make donation anonymous **?**

Email \*  Your receipt will be emailed here.

Phone Number

**Questions**

- \* Is my donation secure?
- \* Is my donation tax-deductible?
- \* Do I get a receipt?
- \* Can I make a wire transfer, give a gift of stock, or send a check?

**VERIFIED & SECURED**  
HEALTHY SECURITY

This donation checkout page is branded with the logo and imagery of Possible, a healthcare nonprofit.

To take advantage of these findings, brand your donation pages with your logo, colors, and images. It is even better if you create donation pages that match the appeal that links to them. For example, if you ask a donor to support a specific project, the donate CTA should lead to a customized donation page that carries the branding and messaging of that project's appeal.

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<sup>7</sup> Network for Good, "The Digital Giving Index." [http://www1.networkforgood.org/sites/default/files/images/digitalgivingindex\\_2012\\_v2.jpg?v=234243](http://www1.networkforgood.org/sites/default/files/images/digitalgivingindex_2012_v2.jpg?v=234243)



This donation form from the National Geographic Foundation is branded to reflect the Build a Boma campaign.

This affirms to the donor that their gift will be used for the specific appeal they responded to in the first place.

### 3. CHOICE

Which brings us to choice. This is a tricky topic because the public has grown to expect lots of choice in their purchases and other transactions, but research shows this isn't the most effective conversion strategy. When people are faced with too many options they are more likely to take no action at all.<sup>8</sup>

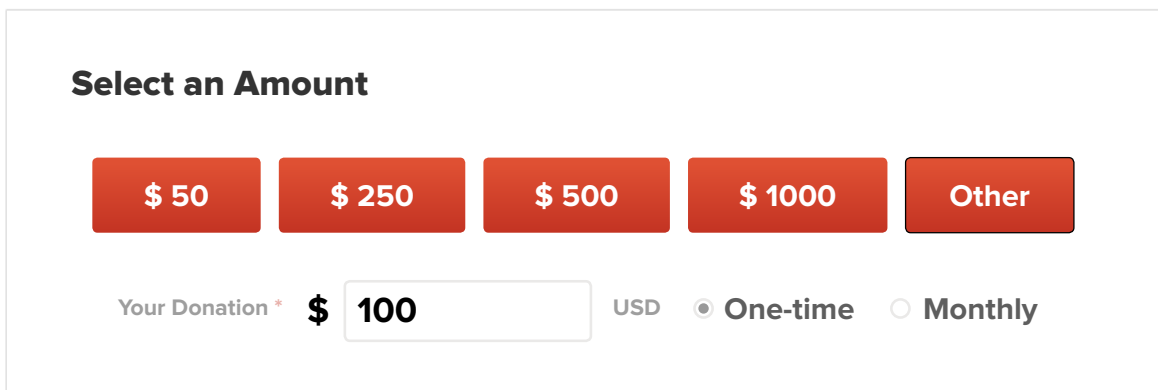
**This is why development professionals need to be smart about the choices offered on their checkout form.**

As we saw above, you want to keep your donation form short and simple, but donors inevitably have to decide how much to give. This is where your suggested giving levels come in.

<sup>8</sup> New York Times, "Too Many Choices: A Problem that can Paralyze." [http://www.nytimes.com/2010/02/27/your-money/27shortcuts.html?\\_r=0](http://www.nytimes.com/2010/02/27/your-money/27shortcuts.html?_r=0)

Your best bet is to offer three or four suggested giving levels along with the option to type in an amount of their choice. The size of your suggestions will depend on your organization and what audience is being funneled to this page. A good rule of thumb is to start with realistic options but also include “reach” suggestions. These are gifts larger than what you receive on average from this audience, but might still be possible from someone feeling extra generous.

Another option you must include on your donation page is one-time gift versus recurring monthly donation. You can keep this simple with a check box or bubble.



The image shows a donation form titled "Select an Amount". It features five red buttons with white text: "\$ 50", "\$ 250", "\$ 500", "\$ 1000", and "Other". Below these buttons is a text input field containing "\$ 100", followed by "USD". To the right of the input field are two radio button options: "One-time" (which is selected) and "Monthly".

Finally, remember we mentioned you could add an additional question or two on the form? You might consider making room for donors to indicate why they donated to your cause or what interests them about your cause, so you can better engage them in the future. It can be as simple as asking the donor to choose their reason for giving from a drop down list or including a comment box.


For example, if a donor indicates that they are most interested in one particular program, your follow up email can include an impact story from that very program. This allows you to make your communications more personalized and relevant.

If you design your donation pages with these three elements in mind, you are setting yourself up for acquiring some happy donors.

## Seal the Deal

Have you ever been to a casual restaurant and see a sign next to the cashier reading, “If you do not receive a receipt, your meal will be free.”? Businesses do this to ensure that employees give receipts and customers know the establishment is attentive in their transactions. This practice may become less common as more purchases go digital, but receipts are still a necessity.

Donation Receipt



Thanks for your donation, Matthew!

Your Receipt	
Receipt Number	2121316
Donor Name	Matthew Campbell 706 Hawthorne Lane Philadelphia, PN 19019
Organization	Team Rubicon
Location Receipt Issued	300 Continental Blvd, Suite 150 El Segundo, 90245 90245
Federal Tax ID	27-1720480
Donation Made Through	Team Rubicon's Eleven11 Campaign
Donation Amount	\$50.00
Frequency	One-time
Donation Date	November 19, 2014 10:44pm

Note: This donation will appear on your credit card billing statement as 'WPY\* Team Rubicon'

**Tax Deductibility**

Team Rubicon is a 501(c)(3) nonprofit organization. Your donations are tax deductible to the extent allowed by law.

Our Tax ID number is 27-1720480. No goods or services were exchanged in return for this contribution.

Customers *expect* a receipt, and the case is no different of donors who have made gifts to a nonprofit. A prompt and accurate receipt is doubly important for online donations because it confirms to the donor that their gift is complete and it can provide the tax information that many supporters want.

If you are using Classy’s fundraising platform, donations will trigger an automatic confirmation email with customizable tax details. This email should include a thank you, of course, but its primary purpose is to confirm the transaction and deliver a receipt to the donor. Don’t worry, though, we’ll get into the real “thank you” in the next chapter.

# Chapter 4

## “Thank you, come again!”

When out at a restaurant, you may have noticed that servers often leave a short handwritten note on the bill, just saying “thank you.” It doesn’t make the food taste better or the service faster, but that small personal touch can go a long way toward connecting with customers.

Even in everyday exchanges, saying “thank you” matters, but when you look at charitable donations, it becomes downright essential. Like we saw in Chapter 1, this “customer” gets their return in the form of good feelings and emotional satisfaction, so saying thank you is a vital part of donor stewardship.

But it is not enough to just say the words “thank you” in your donation confirmation email. If you want donors to continue supporting your organization, you need to give them more.

### What Makes a Good “Thank You?”

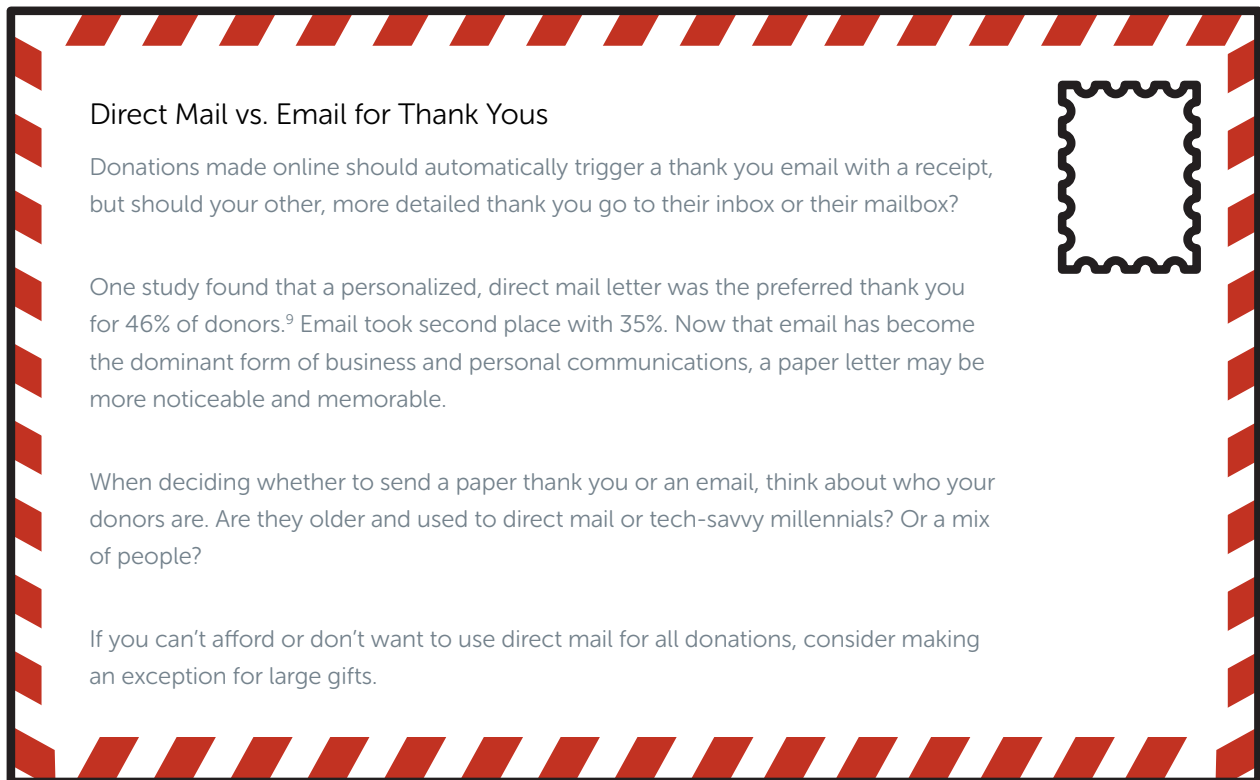
We mentioned in the previous chapter that donors should receive a confirmation email with a thank you immediately after giving. Modern fundraising software can automate this process to satisfy a donor’s need to be acknowledged quickly. But this email should be followed by a more detailed, impactful thank you letter. This is where you deliver the warm glow that comes with making a gift.

Your first priority with this letter is to make donors feel something. This is a challenge because both you and they know you send notes like this to people all the time. It’s hard to be touched by a letter if you don’t feel it was written for you. Fortunately, there are some simple steps to combat this, before we even get into the actual content of the message.

1. **Personalize the letter with the donor’s name.** The salutation “Dear Friend,” might as well say “THIS IS A TEMPLATE.”

2. **Real letters come from real people.** Make sure the letter is sent from an actual person, preferably someone recognizable within your organization, such as the Development Director or Executive Director.
3. **Provide a specific staff member's contact information.** This shows you care about the donor's questions and concerns. Most will likely never reach out, but the gesture still matters.
4. **The letter should be branded to your organization** and, if possible, the specific campaign to which the donor gave.

Paying attention to these details will go a long way toward making your thank you letter a touching response, not just a formality.




### Direct Mail vs. Email for Thank You

Donations made online should automatically trigger a thank you email with a receipt, but should your other, more detailed thank you go to their inbox or their mailbox?

One study found that a personalized, direct mail letter was the preferred thank you for 46% of donors.<sup>9</sup> Email took second place with 35%. Now that email has become the dominant form of business and personal communications, a paper letter may be more noticeable and memorable.

When deciding whether to send a paper thank you or an email, think about who your donors are. Are they older and used to direct mail or tech-savvy millennials? Or a mix of people?

If you can't afford or don't want to use direct mail for all donations, consider making an exception for large gifts.



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<sup>9</sup> The Able Altruist, "How to Turn One-Time Donors Into Repeat Donors." <http://able-altruist.softwareadvice.com/how-to-create-repeat-donors-0214/>

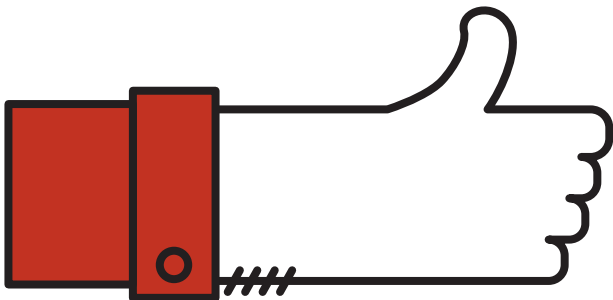
## What about the content of your letter?

To acknowledge the specific gift a donor made, reference the campaign or project to which they gave. If this is a repeat donor, it is also a good idea to thank them for their past gifts. Little touches like this shows that you haven't just sent the same letter your organization has sent to every donor for the past three years.

Continuing with this theme of specificity and personalization, your letter should directly address the impact their donation will create. Donors want to make a difference, and your thank you letter is the perfect place to assure them that they have.

### To sum it up:

- Reference the campaign or project they gave to
- Acknowledge any past gifts
- Tell them how their gift is making an impact



### SETTING THE TONE

Another very important part of your thank you letter is the tone. Obviously, your letter should express gratitude and appreciation, but the tone should also be positive and proactive. It might make sense to explain risks and problems in an

appeal, but thank you letters should focus on how the donor has contributed to the *solution*.

**Note: Thank you letters should not be selling the organization or asking for more.** As much as you want to get donors more involved and giving again, donors will notice if a thank you letter turns into an

appeal. Saying thank you is important enough to donor stewardship that it merits its own letter, free from further asks and promotion.

Dear Dianne,

We just want to thank you.

Thank you for showing your commitment to our state's natural beauty by giving to our City Spaces Campaign. None of our work could be done without you and our other amazing supporters, and we are especially grateful to people like you who give repeatedly.

Having exceeded our City Spaces campaign goal of \$10,000, we are now securing and protecting natural spaces in urban Cleveland and Columbus. Your donation is helping us create 12 community parks that will be free and open to the public.

Six months from now, children and families living in the city will have access to grass, trees, and playgrounds. Thanks to you!

With deep gratitude,

Pedro Michaels  
Executive Director, Ohio Nature Alliance  
pmichaels@OHNexample.org

## What Next?

Sending a personalized, sincere thank you letter will go a long way toward satisfying your donors, but surveys show that isn't all they want from organizations. The 2011 Cygnus Donor Survey<sup>10</sup> found that 53% of donors said that "achieving and communicating measurable results" was important to engendering long-term support. If donors go to the trouble of learning about your cause and making a donation, they want you to tell them what you've accomplished together. Nonprofits should inform donors of the end results of a fundraising campaign and the impact that money will have in the field.

It's important to note, however, that you can't send a couple of bullet pointed statistics and call it a day. A survey of 2,833 Americans by Software Advice<sup>11</sup> (a company specializing in, well, software advice) reported that when asked what type of updates they want to receive after donation, 60% chose "Impact and Success Stories." The second most popular choice was "Nonprofit News" with just 17%.

### WHICH KIND OF POST-DONATION UPDATE IS MORE COMPELLING?

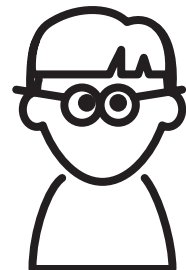
**WE'VE NOW  
RAISED OVER  
\$8,250**

**CHECK IT OUT →**



**THANKS TO  
YOU, I HAVE A  
PLACE TO  
STUDY!**

**MEET JIMMY →**



The implications are clear; donors don't just want measurable results, they want those results illustrated through individual stories. Your latest fundraiser may have provided scholarships to 50 students (and you should mention this), but to deliver the emotional satisfaction donors want, you should interview one child and share how he/she has benefited as an individual. Statistics and final numbers may intellectually

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<sup>10</sup> The Cygnus Donor Survey: Where Philanthropy is Headed in 2011. [http://www.cygresearch.com/files/free/US-2011-Cygnus-Donor-Survey\\_Report-Executive\\_Summary.pdf](http://www.cygresearch.com/files/free/US-2011-Cygnus-Donor-Survey_Report-Executive_Summary.pdf)

<sup>11</sup> The Able Altruist, "How to Turn One-Time Donors Into Repeat Donors." <http://able-altruist.softwareadvice.com/how-to-create-repeat-donors-0214/>



demonstrate impact, but stories deliver the emotional impact that will resonate with donors and encourage them to give again.

## Re-engagement

That brings us to the question, “How soon can you ask donors to give again?” The bad news is that the majority of donors surveyed by Software Advice said nonprofits should wait **7 months or more** before asking for another donation. That’s a long time to separate with a donor! Fortunately, you don’t have to disengage completely.

You now have more options than ever before when it comes to engaging with donors. But remember, this is a guide on donor stewardship, so we’ll be looking at how nonprofits can strengthen relationships by pleasing donors, rather than nagging them.

So let’s start with what you’re working with. If someone has made an online donation, you now have their email address and you know they are interested enough in the cause to actually get involved. Your job now is to make them glad they did and eager to do more.

If you are trying to avoid asks in the months following a donation, you should present your communications as updates and gifts of awesome content.

### WHICH ARE YOU MOST LIKELY TO CLICK ON?

**TOLEDO ANIMAL WELFARE  
ASSOCIATION NEWSLETTER**

**ROCKY’S JOURNEY FROM  
DEATH BED TO DOG PARK**

Instead of asking donors to “please check out our blog for the latest news,” say “We’ve been gathering our most inspiring stories and exciting developments on our blog” and link to it. If you are delivering a newsletter through email, use the subject line to tease the most interesting story.

All your messages to engage donors should also have social follow buttons. This can help you reach people more frequently in a familiar and dynamic setting. Social media allows you to be a part of their everyday conversation.

*“ A great way to respect that a donor may not be ready to give again while still creating new engagement opportunities is to start promoting your fundraising options.*



A donor may not want to write a check, but they might find it fun to ask friends and family to donate for their birthday.

The thank you and re-engagement process following a donation may be the most important opportunity for a nonprofit to deliver the kind of customer service that leads to donor satisfaction. You’ve already done all the work of recruiting them, so spend some time to cement that bond.

# Chapter 5

## Questions, complaints and day-to-day donor services

It's important to have recruitment and engagement procedures in place so that every donor walks away with a good experience, but not all customer service situations are planned. How you handle incidental and unexpected situations will have a huge impact on donor relations.

### How Approachable Are You?

Have you ever walked into a coffee shop to find no one at the register? It's one thing if you are kept waiting a few seconds, but most people will leave without prompt service, and they may never come back. The customer doesn't get their coffee and the shop has lost a customer: it's a lose-lose situation.

The fact is, donors aren't going to wait around for you either. If they try to contact you and run into roadblocks, they will probably give up.

*“ I was trying to do something nice. But fine, if you don't need my help, forget it.*

**DONOR DAN**  
*Newly Discouraged Donor*

So how easy is it for donors to get in touch with your staff?

There are three main channels through which a donor will approach a nonprofit.

- **Email**
- **Phone**
- **Social Media**

Put yourself in a donor's position. They have a specific question and they can't find the answer on your website. They go to your "Contact Us" tab where you list an email address: [info@SampleNonprofit.org](mailto:info@SampleNonprofit.org).

## CONTACT US

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### GENERAL QUESTIONS?

[answers@hjpgives.org](mailto:answers@hjpgives.org)  
(555) 316-2455

### DONATIONS



For more info, please contact  
our Development Director

**JONATHAN GRIEKE**  
[jgrieke@hjpgives.org](mailto:jgrieke@hjpgives.org)  
(555) 316-2455 x 21



I don't know about you, but when I see an address that begins with "info@," I picture a catch-all account that might get checked once a week. You may be very diligent about checking your "info@" account, but the exchange still seems detached and impersonal.

Make sure your donors and anyone else with inquiries about your organization has a friendly face to email.

This can still be an account that only receives donor questions and comments, with the featured staff member retaining an internal email address for other business. The named staffer

doesn't even have to be the only one who checks the inbox. The point is that the donor or supporter sending the email pictures a real, live person reading and responding.

In this era of automation, offering a specific person to contact is an important step in donor stewardship, but a personalized account is only good if it receives personal attention. Your response time to emails and phone calls will vary on the size and staff of your organization, but the rule of thumb is to answer within one day. Even if you can't answer all their questions or need to check on the information, at least acknowledge the email and say you're looking into it. When it comes to customer service, quicker is almost always better.

Many of the guidelines for email communication also apply to phone calls. Your “Contact Us” page should have a phone number donors could call. Ideally, you would provide the direct line of someone directly involved with donor stewardship, but that may not be feasible at all nonprofits.

Something that all nonprofits can do is answer phone calls professionally. Begin the conversation by saying, “*This is the Dakota River Alliance, Michelle speaking. How can I help you?*” (oh, and fill in your own name, obviously!)

If you have worked in customer service before, you may have internalized many of the basic rules of the space. But for those new to customer service or who need a refresher course, here are some tips of that apply to any industry.

## **BE HAPPY TO HEAR FROM THEM**

Like it or not, part of customer service is acting like you’re delighted to be speaking to them. Even if you’re busy or you had a terrible day or it’s 4:50 PM on Friday. That doesn’t mean you do whatever they say, but be conscious of your tone and word choice. If you sound annoyed at their phone call, they may not call again. They also may never donate again.

## **LISTEN**

Even if you don’t have the answer they want, many people will be more pleasant if you are simply willing to listen to them. This might be a concern many donors have, but none have bothered to express. The person on the other end might

suggest their interest in project in desperate need of attention. If you listen closely, you will have a better idea of what this donor wants and how you can give it to them.



## **DON'T GUESS, FIND OUT**

There’s no better way to displease a donor than to give them false information. It is always better to find

out an answer for sure than to guess at the answer and later be confronted by an irate supporter. Saying "I don't know" isn't weakness. As long as you follow it with "let me find out for you," then its good donor stewardship.

## Stewardship through Social Media

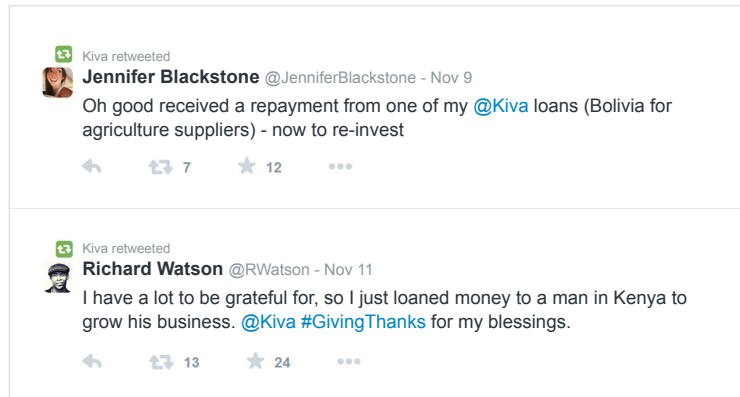
Many nonprofits think of social media as a way to distribute their promotional content, but what has actually made these platforms a cultural mainstay is the potential for conversation and interaction. If you never answer comments or retweet mentions, you are missing out on an easy way to connect with donors in the spaces where they already spend their time.

The good news is that social media exchanges are often short and simple. You don't need an essay to accompany your Instagram post. Just pay attention, "like" comments, and respond to questions.

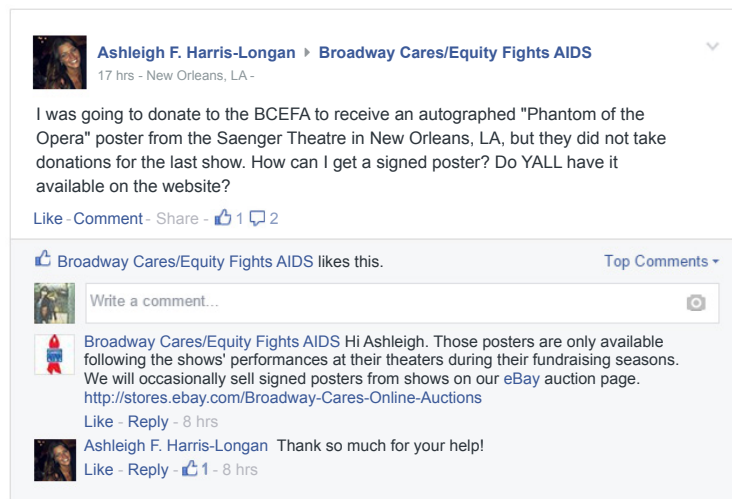
Social networks like Twitter are great for publicly acknowledging and thanking individuals who have supported you. These examples show how Charity:Water uses Twitter to celebrate their supporters.



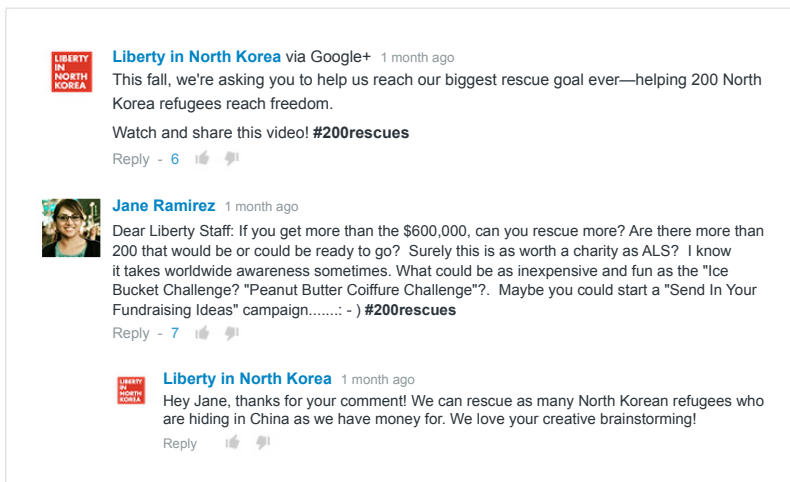
Kiva frequently retweets posts about their micro-lending platform. This not only engages with those who were talking about them in the first place, but also offers social proof of the wide-spread support their brand.



More people are also using social media to ask questions about nonprofit organizations or interact with them directly. Here are a couple of examples.



When this person asked about a donation reward, the Broadway Cares/Equity Fights AIDS commented back to help her out.



This example is from a comment on one of Liberty in North Korea's YouTube videos. LiNK answers the question and thanks the commenter for her input. They let her know that they read her ideas and are happy to hear from her.

Not only does this build a stronger relationship with the commenter, it also sends a good message to people reading. People who scroll through the comments will see that LiNK pays attention and addresses their supporters' input. Engaging in conversation is a great way to strengthen and grow your supporter community!

Social networks are an inexpensive way to share content and create engagement, but to truly take advantage of these spaces, you need to talk to individuals and create an active dialogue.

## Complaints and Confrontation

We couldn't get through a guide on customer service without addressing the ethos that haunts every retail and restaurant worker in America: "The customer is always right."

Like it or not, this attitude has led consumers, and by extension donors, to expect organizations to bend at their will.

So, is the donor always right?

Of course not, but don't tell them that.



Donors and customers are wrong all the time, but nonprofit staff members have to balance standing their ground and satisfying donors. There are some donors who will think making a donation gives them veto power over your organization, so how do you assert your autonomy and competence without making a donor feel disrespected?

The key is accepting their input without making promises. Just like Liberty in North Korea, thank them for giving you another viewpoint but there's no need to tell them you will or will not take their suggestion (or demand). If they press you, tell them you have to balance donor input with your professional advisors, but you are noting their concern.

In many cases, that will be enough. But people in customer service all have their horror stories. You need to be prepared for donors who become hostile or argumentative.

It can be incredibly difficult to remain professional in these situations. Here are the three tips to help you make the best of any customer service issue.

### **IT'S NOT PERSONAL**

When you're the one talking to a disgruntled donor, it can feel like it is you versus them. You have to remind yourself that, in all likelihood, their problem isn't with you. There's no telling what circumstances led to them becoming so upset. Maybe if they hadn't spilled their coffee or gotten a parking ticket, they never would have felt wronged. You can't control what has led them up to this point. All you can control is your own actions.



## **STAY COOL AND NEVER ESCALATE**

It takes two to tango, but you don't have to dance if you don't want to. If someone yells at you or insults you, you will probably be tempted to reciprocate. But this only makes the complainant sound reasonable, it only justifies them in continuing to yell and argue.

Kindness is the only way to put out the fire. If you remain calm and pleasant, how ridiculous do they sound yelling at someone who's being reasonable?

Some people have a lot more trouble staying calm, so if a more reactive staff member is in this situation, they need to know when to pass the situation on to someone else.

## **ADDRESS THEIR CONCERN**

This step goes back to listening. Even if you can't give the donor just what they want, being willing to listen and appreciate their view can help mend the fences. Restate their problem in your own words. Explain what you can and cannot do for them right now. Be willing to admit it if a mistake was made.

You want the donor to come away from this feeling that they were heard and you cared about their concern. If possible, tell them of some action you can take to make their grievance right.

- **Send additional information on the program or issue that concerns them**
- **Correct a mistake in an email, newsletter, or web page**
- **Bring the issue up with a supervisor or the organization's leadership**

One thing jobs in customer service and nonprofits have in common: they're not for the faint of heart.

To offer the ongoing service donors want and expect, nonprofit organizations need to be approachable, responsive, and patient. Fortunately, the majority of donors will treat you with respect and appreciate your work.

# Chapter 6

## Going the extra mile

Throughout this guide, we've tried to emphasize the importance of meeting donors' expectations, but truly great customer service *exceeds* expectations. Good service might be enough to satisfy a donor, but surprising and delighting them with great service can win support for years to come.

### Amazing Service = More Customers (or Donors)

When for-profit businesses think of customer service, they think in terms of repeat and lifelong customers. Nonprofits should do the same.

It is much more economical to retain an existing donor than to attract and convert a new one. A little initial effort can pay big dividends when a donor stands by you in the future.

Nordstrom and Zappos are two companies that provide endless examples of great customer service. Both businesses follow a policy to accept all returns. That's impressive in itself, but that is only the beginning. It is the individual stories of the companies going the extra mile that really define their service.

Perhaps you've heard the story of the affable Nordstrom clerk who helped a customer return some tire chains, even though Nordstrom doesn't sell tire chains.<sup>12</sup>

Or maybe you heard the story of a woman who ordered six pairs of shoes from Zappos, trying to find some that would be comfortable on an injured foot. When she had to return the shoes, she happened to tell Zappos why. Imagine her surprise when Zappos sent her flowers and a "Get Well" card.<sup>13</sup>

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<sup>12</sup> Brand Channel, "The Importance of Storytelling in Branding." [http://www.brandchannel.com/papers\\_review.asp?sp\\_id=487](http://www.brandchannel.com/papers_review.asp?sp_id=487)

<sup>13</sup> Infnit Outsourcing, "10 Inspiring Zappos Customer Support Stories." <http://www.slideshare.net/InfnitOInc/10-inspiring-zappos-customer-support-stories>

These are examples of companies going above and beyond the call of duty. Not only did they please the individual customer, those customers spread their experience, becoming evangelists for the brand. They didn't only retain business, they created stories that attracted more.

We wouldn't suggest that you refund people for tire chains you didn't sell, but there are lots of other ways nonprofits can delight donors.

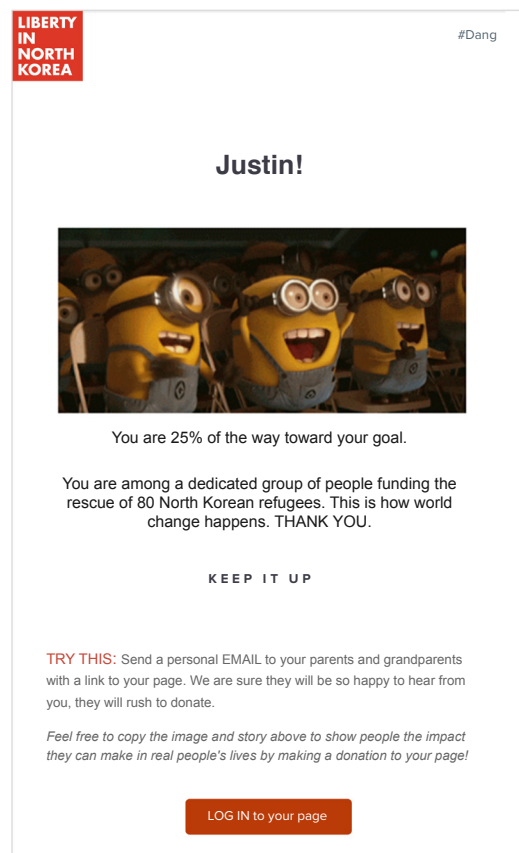
## Examples of Outstanding Donor Stewardship

When we spoke to Liberty in North Korea's Vice President, Justin Wheeler, he said something about their email strategy that stuck with us. When LiNK sends supporters an e-mail...

*“ It NEEDS to be the best email [our subscribers] receive on that day.”<sup>14</sup>*

**JUSTIN WHEELER**  
*Vice President • Liberty in North Korea*

LiNK fulfills this commitment by delivering emails that are visually pleasing, easy to read, and full of personality. This is how one organization delights donors by giving them something more than they expected.



<sup>14</sup> Classy Blog, "Delight-Direct-Measure: E-Mail Marketing Secrets from LiNK." <http://www.classy.org/blog/delight-direct-measure-e-mail-marketing-secrets-from-link/>

Team Rubicon has won many fervent supporters through a different method. Donors have been shocked and pleased when they received a thank you phone call from veterans working at disaster sites. Donors expect to be told “thank you,” but the experience of receiving a call from the people using their funds in the field makes the impact infinitely more real.



A phone call from a disaster site volunteer is a powerful way to strengthen bonds with donors.

If LiNK or Team Rubicon had just met their supporters' expectations, donors may have been satisfied, but they also would quickly forget the experience. By surprising donors with something more, they have not only satisfied the donor, but “wow”ed them. They may even tell friends about their funny email or that touching phone call. With some extra effort, the little things can make a big difference.

## How You Can Do It

To help you get started practicing amazing donor stewardship, here are a few tips to find where you can exceed expectations.

### **MAKE THE ORDINARY EXTRAORDINARY**

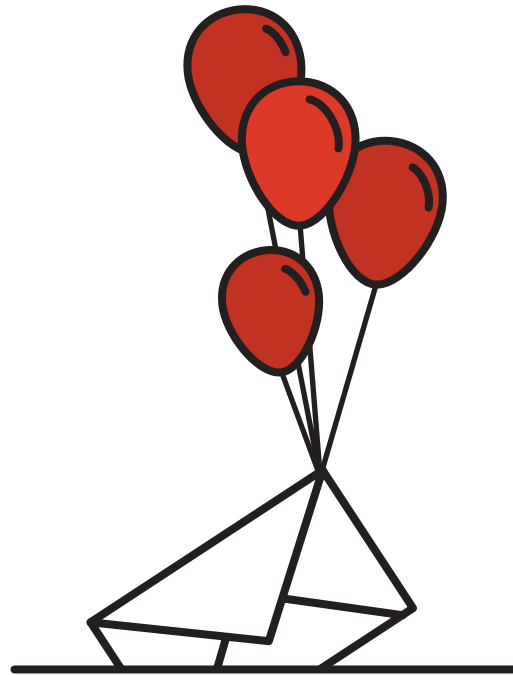
Returns are a pretty ordinary part of doing business in a department store, but by accepting all returns, anytime, Nordstrom turns it into something to talk about. Saying “thank you” to donors is ordinary, calling them from the base camp of a Hurricane rescue site is extraordinary.

Try to find an ordinary part of your operations or donor stewardship and see if there is room to do something more. Is there something you could do to make a “thank you” memorable?

### **SURPRISE DONORS WITH IMPACT**

Donors want impact stories following a donation, but don't be afraid to celebrate a win when you get one. Maybe it's something big like the passage of important legislation for your cause or maybe it's a small victory, like a former constituent of your homeless center moving into their own apartment.

It's nice to get a card or letter in the mail around the holidays or your birthday, but it's extra exciting when you don't expect it. **Send donors some good news out of the blue.**



## MAKE THEM SMILE

Many people give to nonprofits partly because of the warm feelings they get from helping others. They give to charity because it makes them feel good.

And you can give them what they want, through email, social media, and more. Pictures and video are an especially powerful way to remind donors why they give. Many nonprofits have found posting stunning impact images on Twitter to be a great way to inspire donors on a daily basis. If you use Instagram, you can also post short videos.



With smartphones, you have ample opportunity to record the heartwarming moments that keep you motivated to work for this cause. With just a few clicks, you can spread that passion to donors all over the world.

There are so many things development professionals do to recruit and retain donors, but giving them just a little extra attention or access can really make your organization stand out!



#### 🎥 Watch the Video

Pencils of Promise tweeted a great user-generated video to celebrate their sixth anniversary.



# Conclusion

In many ways customer service can be a challenge, but we hope that this guide has demonstrated the *tremendous opportunity* it poses. Outstanding customer service can help you distinguish your organization and lead to the type of human connections that breed long-lasting support. Far from being an ancillary process separate from your social impact, customer service is vital to ensuring that you have the resources to continually deliver on that promise of impact.

The next time you have an opportunity to address these practices in your organization, do more than focus on meeting expectations. Work towards delivering a truly remarkable experience to your supporters. Your donors deserve the extra attention and your organization will reap the rewards that naturally flow from a superior level of service.



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