0:00

Heather, thank you to the non-profit Tech for Good Team for hosting us here today. I am excited to get into our topic, which is How to Design a Magical Generosity Experience Using Your Nonprofit's Website.

0:14

I'm going to get into kinda what we're going to be drilling in for the next 45 minutes or so. But a little bit about me if you don't know who I am, and who Neon one is.

0:24

We are a technology and services company that empowers non-profits with things like CRM and Web sites to enable your organizations to create magical generosity experiences, and grow a community of support.

0:40

I've been fundraising directly with or for non-profits since 2008 getting my start in the sector as a grant writer, but since that time I've grown into a few different roles in the sector right now I am our head storyteller, if you will. That's really what corporate brand means is what is the story, and how it relates to you. And we're gonna get into to what that means, because we have a unique point of view that I'm excited to drill into. But we always try to make things very data driven. So there's going to be some actionable insights here. And a big reason of that is because of our support and participation in initiatives like the Fundraising Effectiveness Project, which has support from Bloomerang, Donor Perfect, and Keela, as well as the Association for Fund Raising Professionals in giving tuesday, and it's the biggest analysis of donor data in the world.

1:33

So that goes into what we're going to be talking about today. And I use, Are our systems and things like that. I actively fundraise and we like to ask over here what people's favorite pie is. So, just to make sure that the sound is still working.

1:49

If you want to throw your favorite pie into the questions area or the chat area, I will be checking that out.

1:56

Minus, pumpkin or duch depending on the time of the year pecan, there we go.

2:01

There we go. We got peach. None. They're all correct. There you go. That's another acceptable answer. No wrong answers here.

2:08

OK, so we're not going to be talking about pie, even if people are talking about the really awesome Ches Fire Boston, cream pies, or Math jokes.

2:18

What we're going to be doing is getting into what exactly do we mean by generosity, experiences?

2:24

And because we're very data driven, We want to give very actionable and practical insight on how to think about a website and a CRM connection project.

2:35

Because ultimately, that's what we're going to be drilling into is around the needs that you have to practically design, and especially non-profit Tech for Good. Many of you are the typical non-profit. You don't have millions of dollars to throw at different things, and hope that they work. You're probably a small staff, and so everything that we need to do is to be focused on how to make this technology actionable for especially small to mid-sized organizations.

3:06

So let's get into what we talk about and think about when it comes to the generosity experience. It may be a term that might be new to you, so let's go ahead and unpack it. But first, I want to get a sense from the audience.

3:21

We, we partnered with non-profit Tech for Good, because we know that a lot of you could be helped by thinking through the different things that we're going to be talking about today.

3:30

But a few questions for you, Know, how long have you been raising money from individual individual donors? So, not grants, not things like that. If you want to throw that into the Questions tab, I'm paying attention.

3:45

Also wondering, how many different systems do you typically use to track your marketing and fundraising activities, and do you struggle with this?

3:53

Because some of you were just starting, some of you are a few years in, that I'm seeing somebody who's seven months, Kim. And so, to kind of get an understanding of not only how long people who've been working in the sector, but the different things that you're using will help me kind of tailor this a little bit more.

4:12

So, so, a lot of you were generally new, or we're kind of growing into the sector, which is really, really important because now, you have one system, Rachel, so, you know, we're gonna get into a few different things that relate to test but, and, thank you, Diane and others who continue to share. So, happy that the audio is coming through too.

4:34

The reason that I ask these types of different things, is because we are facing what this book calls a generosity crisis.

4:45

If you haven't read this book, it's something that I highly recommend, but I'm gonna give you the too long didn't read, which is that we are at a crossroads of where our sector can go.

4:58

And it comes down to three main things that you should be paying attention to, regardless of your size of the organization. Many of you who especially, are new to the sector, these are things that are a rolling set of decisions, that have been made for decades, that are now starting to come do.

5:17

So I want to give context for what we mean by what is a generosity crisis first.

5:21

More than more than half of US households are deciding, know, maybe I want to give to charity. Maybe not. We're at the 50% range for their, according to the Lily Schools analysis of this. And it's not that people are less generous.

5:37

It's that they don't necessarily believe that non profit organizations are the first place that they should go where corporations are starting to step in something like Patagonia, for instance, where people are like, I can make an impact and buy a product.

5:52

So, that's something that we have to contend with, then we also have to actually contend with the role of for-profit technology in the sector itself.

6:02

The average non-profit, According to research Done by L E K, a respected research firm shows that the typical non-profit is using 3 to 5 different data sources to manage their fundraising operations alone, websites, E mail, online donation, CRM, et cetera.

6:20

And so many times, we rely on for-profit technology to do this. Some, Kansas actually named something like Google Analytics, right.

6:29

It's not base for and built for the non-profit sector. In many times, that can be great.

6:35

But other times, it isn't so great MailChimp, increasing the pricing on their free program, Salesforce, cutting, a lot of the staff members that are part of their dot org operation, things like that.

6:49

And so when you get down to it, a lot of times when you have this technology that is either put out there and, and, and it's supposedly free, like the Salesforce licenses or some of the other options out there, that you're, you're kind of relying on something that isn't necessarily built for the non-profit sector.

7:08

But in turn, the technology that's been structured around the non-profit sector isn't necessarily serving us either.

7:17

The Fundraising Effectiveness Project tracks donor retention rates. And donor retention overall, has consistently fallen year over year.

7:26

It's around 44% right now, which means that over 50% of donors are not coming back, on average for the typical non-profit, And it's actually worse for new donors, which is only 18%.

7:39

That means that eight out of ten people who gave to an organization last year are likely not coming back.

7:46

The biggest reason, according to doctor Adrian Sargeant, that these organization people don't decide not to go come back, is typically communications based.

7:56

So if we are confronting that, there's shakey trust in non-profits and it's because there's a crossroads, an intersection of where technology can actually help these organizations. Because you see transformative growth in other sectors, but the non-profit sector has just not figured this out yet.

8:16

Part of it, is because we need to step back and view this as a holistic generosity experience. And we're gonna walk through, in our present today presentation today, three general guiding principles that any organization can follow to prioritize where their efforts should go when it comes to technology, and the revenue generation that they need to do.

8:39

And first and foremost, you actually don't start with the money. You focus on your audience and your people.

8:45

So that's rule number one that we're going to unpack.

8:47

Rule number two is focused on the experience of connection with people.

8:52

So what are the ways that they are actually walking through and experience your story?

8:57

And then technology should be an accelerant to you don't start with technology. And I think that's where a lot of issues that we have with technology and digital transformation and adoption come, is that they're presented as a silver bullet.

9:11

Where they say, OK, if you just use this technology, then it's going to solve your problem, and that's not how it works. You need a solid plan. So, we're gonna get into, actually, how to structure that. But, ultimately, a generosity experience is by connecting marketing, data, revenue related data, and impact data.

9:30

You need to be able to know why somebody gave in the first place, you need to give them options that are pleasurable and giving. And that can be your typical online donations.

9:41

But there's also things like memberships, subscriptions, or ticket sales and workshops, and all these different ways that people might show their, their affinity for your organization, beyond engaging with the non financial items, like volunteering, board participation, opening newsletters, et cetera.

10:02

So, that's where, if you understand why somebody cares about you, and we're gonna unpack that, and how it relates to website design, how it relates to execution on your giving, then you can use that to drive the story back to, to them.

10:17

We're going to cover all of these.

10:20

But the reason we have to do this, is that the typical non-profit, and tell me, use, use the comments. If it does this look familiar to anybody?

10:30

Is this a typical thing you might see at a presentation, telling you how you should think about donors?

10:37

Because this is how I was taught.

10:39

When I went back in 2008, this is typically what we're told. How you should engage donors and Genesis, right there is also, you know, familiar with this. This is the donor pyramid. You typically hear about this, to engage major donors, and you work them up the pyramid. Here's the reality.

10:58

People don't actually work like this.

11:01

What they actually do is this.

11:06

Now, hopefully Jacqueline agrees with this type of visual as opposed to the pyramid, because this is the actual reality. It an experience is fluid. It is organic. You have to anticipate the flow of why somebody's going to come to you.

11:23

Because the reality is, is that many CRMs, for instance, on the market, you're gonna, you're gonna have the donor magically appear in the database, right?

11:34

And it doesn't necessarily understand and track the fact that they found out about you because you put a flyer up in the local Starbucks on that bulletin board that they have. Or somebody shared one of the blogs that your program participants participated in for an interview.

11:53

Or they saw a video relating to a peer-to-peer campaign. This is the reality.

11:59

This is why a generosity experience connects the awareness data with the reply back data.

12:10

The reason that we're going to zero in on websites, in particular, over the next 30 minutes, is because this is a major opportunity, especially for small to mid-sized organizations for this. Now, if you do follow non-profit Tech for Good, some of this data may seem very familiar, because this is for the 2023 insights.

12:32

91% of organizations have a website. For instance, 68% have redesigned their, or, their website within the last three years, but is it serving your needs?

12:42

Because this typical organization has 3 to 5 different fund raising data sources: website, e-mail, CRM, online donations, ticketing, etcetera, And every time you introduce a friction point in the generosity experience, your donors notice.

13:01

That's why we're going to actually talk about this from a very practical way of how do you control that organic flow. That can seem very overwhelming, right?

13:12

It's a lot easier to think about it in a pyramid in many ways.

13:15

But the possibilities are so much better when you think of this as a flowing generosity experience. And what your job is, is to figure out how technology can release your time. So you can focus on making it magical. The tech doesn't make it magical.

13:34

YouTube.

13:36

So, how can you set yourself up for success? First, let's talk about smart goals and overall key performance indicators.

13:45

This is just a fancy way of making a project actionable, measurable, achievable.

13:54

So, smart stands for Specific, Measurable, Achievable, Relevant, and Timely.

14:02

And so this is an important organizational structure that anybody can use to basically say, when we're initiating a project, such as a campaign for end of the year, or maybe we're redesigning our website, or we're going to roll out a new giving program or something like that. Smart helps organize that.

14:23

You could say, OK, we're going to do this thing in this period of time.

14:28

And we make it realistic, so you use actual data that you have on file to make it relevant to your work.

14:39

So, this is an example, then here are the key performance indicators that specifically can be focused on for a website and CRM project.

14:49

Generosity Experience Design takes into account different metrics depending on the campaign. In this case, it makes sense to focus on donor retention, how many people are coming back.

15:00

Donation page conversion rate.

15:02

So this is how many people are visiting the website and then actually donating recurring giving. Revenue projections is a helpful one because especially small to mid-size organizations are extremely effective at engaging donors in recurring giving. If you don't have a dedicated recurring giving program, for instance, this is one channel that you should definitely prioritize. But there's ways that you could do it from a flow standpoint that can introduce first time donors, as well as give the opportunity for mid-level donors to participate in a meaningful way by discovering it on your website.

15:40

Then growth in given growth in giving is generally a metric that you should always be tracking, and this is just overall net gains and net losses. What is the percentage difference? If you have a negative growth in giving rate, that is a problem.

15:55

So, some of these are behavior that's already happened, such as donor retention.

16:01

Some of these are things that can tell you the future of what somebody might do, such as recurring giving projections.

16:09

Those are called leading or lagging indicators. So, all it generally means is that you're paying attention to these key things.

16:16

Notice, I'm not having you focus on a bunch of random SEO optimization metrics. Is that stuff important? Websites, Absolutely. Do you need to prioritize it? Probably not, especially, if you're starting out.

16:30

You want people to be able to find you, and you can work that back.

16:34

But, at the end of the day, when it comes to revenue generation, these are the things that you should be paying attention to.

16:42

But.

16:44

We can't actually find donors, if we think of them as ATM's, so that's why rule number one, focus on people.

16:52

not money, but we're gonna unpack what this actually means first, When it comes to designing your website. When we talk about focusing on people, not money, what we really are saying is, What is the story that we are telling donors?

17:09

And designing a website that you want to optimize for this can seem very daunting. You can just go, Well, do you know, throw me, throw me a WordPress website template up, and I'll just fill in, you know, whatever, right?

17:21

What you should actually start with is what is the actual story you want to tell and which audience are you telling it to? Now, we're going to get into the audience side in just a moment.

17:32

You can start by actually even just taking out a piece of paper and drawing out what you want to envision is the flow.

17:40

And I am going to encourage you, if you do have a notebook, if you do have a piece of paper handy, there's a few exercises that I'll be prompting you during this presentation just to get the kinda the juices flowing.

17:54

But when, when we talk about things like identity centric copy or visual design and consistent branding, each of these can have their own presentation, right?

18:04

So I know I'm kind of glossing over a lot of the tactical elements here, but these are some of the key five steps that you should be thinking about, Visualizing it, making it audience friendly, making it visually attractive and consistent.

18:19

Creating the assets that make this possible.

18:23

Then, there's a lot there, when it comes to, what, when I even the word coding, might be, giving you a heart attack, right now, it shouldn't.

18:31

And so, the reality is, is that the technology has gotten a lot easier, and affordable to make these things possible.

18:39

But you have to have a clear vision of what you want to accomplish before you even start this process and test it, test it obsessively, we're going to get into what that can actually look like. But, don't just throw it out and hope that it works.

18:55

Now, what drives donor behavior and goes into how you can design a generosity experience from a people centric standpoint first.

19:04

Well, we have to understand why people make the decisions that they do in the first place. And donors don't necessarily behave the same as e-commerce.

19:14

People actually end up giving around the same time, and we're going to touch on that data point.

19:20

But the reasons that people actually give are much more interesting, in my opinion.

19:27

But ultimately, what we want to do is trigger the feelings of self actualization theory, which is just a fancy way of saying that people feel competent that they made the decision on their own, and that they feel part of a movement.

19:41

So, what do you tell people to get them to feel this? What is your story?

19:48

So when we talk about identity, these are the things that make people feel part of that movement, that you can appeal to an individual's sense of self worth while still tying it to a larger movement.

20:06

So, competence, I am smart, because I gave to this organization, relational identities. I see a photo.

20:18

And this is an organization that works with families, and I see a family. I have a family, that is a subconscious trigger toward that.

20:27

And so on, and so forth.

20:29

So just thinking about the different things that make people have an affinity for your organization is a good starting point, because you can't just assume that people are good.

20:40

Everybody likes to think that they have a moral foundation to who they are. But people are much more nuanced and deeper than that, and different types of missions are going to have different types of identities. That will be their strengths.

20:55

So, this isn't want something that is like a checklist, that you have to work through and go, OK, I have covered that group identity.

21:03

You have to ask yourself, well, why do people care about us, And so, when you're translating that into the design aspect, this is where the flow of the generosity experience matters, because you can first ask yourself, well, who am I speaking to? The moment that they hit our website? Who is your audience?

21:24

And so, it's interesting, because depending on the visuals, the words, the navigation that you choose, that can actually tell people whether that this website is for them or not.

21:36

So, in an animal organization example, maybe your different audiences that you are trying to tell a story to are people who want to adopt, and people who want to give, or people who want to attend a educational workshop.

21:55

So, you tie the things that make you unique and appeal to the people who are most likely to take those actions, and you do this in very clear language if it's muddled, and you're trying to talk to too many people that you're talking to, no one.

22:14

So, that's where focusing on people first leads into what does your website even tell people whether it's their community or not?

22:26

Then, now, getting into the explicit side of activating that let's drill in and say, OK, out of the three audiences that we're designing for, the adopters, the workshop participants, I want to focus in on the Donors'. Let's focus in on what their journey looks like.

22:46

The biggest thing that you can focus in on is the donation page itself.

22:54

OK, so, and this kinda gets into Philip's question, which is what are the calls to action?

23:03

And so, a donate button can help cover the donor side well, then, your primary navigation could shift perhaps more toward the other audiences that you are engaging.

23:16

So, if we continue to use our animal organization, and as an example, the donate button might just, say, Donate, or Donate now.

23:24

And then, the other main navigation items at the top, say things that appeal to the other types of audiences, But with the button, it is a best practice to make it prominent, colorful, and right on the right-hand side of your top navigation.

23:40

Make sure that it's brand appropriate, as well.

23:44

So, have the colors popp, but make sense with your logo.

23:50

Now, this also gets into Phillips question, which is you can have multiple calls to action. So, I'm gonna use this is a local organization to me that uses Neon CRM, inter-faith Partnership for the Homeless ..., and and so I took a little Jeff or gif of their homepage. And this is how they're actually introducing those different audience elements, Phillip.

24:13

So I feel like this covers it, because you can have a rotating carousel right on your homepage that says, yes, this is the very first thing.

24:21

Story, that we want to tell everybody, And it might be about the mission, and might be, you might test it and show that another program thing works better. You might test it, and then maybe the donation call to action actually works better. You're going to realize what works best for your community of generosity.

24:40

But an easy way is a carousel rotating carousel with different calls to action at the top. Notice that the imagery changes that the different emotional resonances, and the different stories that you're telling with words and images change depending on the audience.

24:57

So generosity experienced design starts to open up this possibility of personalization without having to think about a lot of technical components.

25:09

An excercise takeaway for you, is, think about three primary audiences that you have and what might they be that you can start to design a homepage adjustment, either through navigation or rotating carousel or things like that.

25:28

What would be your three volunteers?

25:33

Program, items, et cetera?

25:38

Then, again, if this was a workshop, we'd stay around and I would wait and we would ask for folks. But we're gonna keep on flowing because I've got about 20 minutes for you.

25:48

So, rule number two, focused on the experience of connecting with people and continue to pop in great questions like Philips.

25:57

Genesis has comments, things like that.

26:00

So, rule number two, focused on the experience of connecting with people.

26:05

And so, this is where we get into the psychology of donor, behavior and the call to action itself. So we're, we're, we're drilling further into the generosity experience. We've appealed to the right audience to get somebody to act. And they want to act in different ways. So we're going to actually even cover the different experiences for different types of donors.

26:28

So, one of the things that you can think about is, well, OK, how can you personalize the experience? When can you personalize the experience with even things like technology? This is an example from the website builder that we have, where hearts can float down on a day of your choosing, right. So maybe it's giving tuesday, something like that, so think about when people are actually giving, and then you can tailor your messages and your anticipation based off of that behavior. So, all you have to do is look historically on what month people are giving, for instance, and it starts to give you an understanding of when they are going to act. We actually analyzed this, and we looked at the days and times of the week that people are most likely to give.

27:13

Typically, it's a Thursday afternoon, but pretty much, that tail end of the week, when people are kind of mentally checking out and it's lunchtime, they're starting to make plans. This is when you can get eyeballs on something like your website.

27:30

So, don't don't discount the power of Omni channel engagement, you send the e-mail out, and then that drives to something special on the website. Great. While maybe you can do this at optimized times that you know that people are most likely to give.

27:48

You can use data to understand your own community of generosity to do that.

27:54

Also, think about optimizing when people might be going in and if the content on the pages is going to change. So, are you just sending people to a generic page all the time, or are you creating a high quality, specific campaign that is timely for them? Remember, your smart goals, timely isn't just time of the year, it's also time, connection mentally for the donors. So, for instance, we saw a bunch of the Valentine's Day things, and messages and e-mails. And maybe even the campaigns might appeal to that. You will know what's going to be best for you. But people don't just given December, they're going to be giving at any time of the year, so you can make this timely for them and adjust your content as such.

28:44

So, if you want to zero, win and think about the experience, the way that you have to start to kind of organize things is through the holistic friction points. Every time that somebody goes through the experience of giving. What is the story that you're telling? Because donors can pick up whether there is a narrative disconnect, So that means the colors, the branding, the fonts, the language on the page, the fields that you are actually putting on your donation forms, and even down to the donation options themselves.

29:19

If you enter in friction points into any of those, the donor will notice, according to Classy the average amount of time. It takes people to donate to complete a donation on the Internet.

29:33

At this point is four minutes, which is a lifetime if you compare that to e-commerce. So, it means that people will suffer through poor experiences, but what it does is leave a bad taste in their mouth.

29:48

So, what I want to do is unpack next, how to actually address this from a tactical standpoint.

29:55

We're gonna get into the role that technology plays when you're designing your generosity experience, but exercise hashtag to go to your website after this presentation, and, and actually click, how many times does it take to get to the donation payment page on your website?

30:16

Because, if it's basically more than three, you have a problem, and just like the old seventies, Tootsie Roll Commercial, you're either going to have donors that will suffer through, or they're just gonna kinda bite through, and try to get to the end, and if it's difficult for them to do that, they will likely give up.

30:38

So, how can we think about this and design this experience from a technological standpoint?

30:46

When we're designing our flow of the experience, we know that the story matters. We know that the donor is going to pick up on any narrative, disconnect through the experience itself.

30:59

So, especially to small shops, how can you use technology to accelerate the experience and starts saving you time?

31:09

This is where we revisit what this actually represents, which is that technology should be helping capture all the interests. It should have the different channels of where people want to give anticipated.

31:25

And so, if you've planned to map things out, which we're actually gonna, I'm gonna show you an example of that, that you can begin with your next planning exercise. Then it starts to make sense on, OK, I think we need to focus our efforts on this part of the journey.

31:43

And this is becoming more and more important, because non-profit donors are getting savvier in how they want to get communicated with. Now, e-mail continues to be the highest driver of engagement.

31:58

About 48% of donors prefer e-mail as their primary communication channel, but as you can see, off line, social media, etcetera, all are ways that a story could be told. But they all every single one of these needs a home to send people to.

32:17

And that is your website.

32:20

And so when you're thinking about this, think about the channels that surround how people get to your website, and to design around that, so a really good one, if we know that e-mail is one of the biggest things, then what is the experience of somebody signing up for your e-mail newsletter?

32:39

For instance, or is there a welcome series that happens when somebody makes you gift?

32:45

E-mail Automation options. Help tie that story from the quick way that somebody decides that they want to act by hitting the website into a holistic drip. That continues to engage them weeks after that at that first gift.

33:03

You could also build in things like video, especially with the web site, if you want to embed these types of things on donation pages, then it gets easier. So you can actually have it where it's going out in something like a social media channel.

33:17

But then can be replayed and re-used in other parts of the journey on the journey itself.

33:25

Technical copy, tactical things, so not everything has to be a technical solution to check. And what I mean by that is thinking about the language that you have in your donation pages, and your donation receipts can help accelerate this to identity centric copy. I'm going to give an example of that, shortly, even, there has been research that shows that by shifting the object of who you are talking to in things like e-mail, copy, it can have a lift in retention rates.

33:59

So there's a lot of different ways that you could think about this. Here's a resource that you can grab using this QR code in our follow-up will be promoting some of these other resources.

34:11

So don't worry about it now, if you don't want to do it, Just wanted to give the opportunity, but let's keep moving on, got about 10 more minutes before we open it up for more formal questions.

34:23

The reason we have to think about this is because this is the typical experience somebody will have, when giving to your organization.

34:32

There is always a beginning a peak of the experience and an end. This is based off of Daniel can amend a sociologist, a Nobel prize winner who developed what's called the peak end Rule. It's that people don't remember the average of all the different things that happened during a journey. They remember the high or the low and how it ends.

34:54

And so the typical online donation experience, for instance is pretty lackluster, you know, you get your PayPal receipt and then that's about it.

35:04

But, if you lean into and understand that there's a peak, that is a moment, that you can get it where somebody can remember something special about the experience and how it ends.

35:17

Such as a really interesting way that you're giving your annual receipts, right? That's a big thing that's happening right now because it's tax time. Everybody's sending out their summary receipts. Is there something that you can do to make that interesting, when you're doing that? Can you drive them to a special resource on your website for an impact report?

35:40

This is how you can sync of human psychology and tap into that to make it really stand out for your own community of generosity.

35:51

Now, a simple way that you can think about this, even at the point of transaction, is the exit page of that your donation experience itself. Where are you sending them on the website after they have given?

36:04

And can you leverage technology to hammer home that identity first approach?

36:10

Something like a dynamic merge tag that remembers their name, simple stuff like that, and even using a language, you're a generous person, Philip Jenesis, Jacqueline.

36:23

Adding social buttons also has demonstrated lift in donations. This. This is especially true in peer-to-peer campaigns. And we've also found that adding other types of calls to action. At the moment, somebody's given is going to have another noticeable lift in their opportunity to continue into their deeper affinity for your organization. Generosity is not just money. Remember, it's people first, So if they want to do volunteers, if they want to become a volunteer, if they wanted to host a party related to your capital campaign, think about the different ways that you can build affinity for your organization.

37:08

So, one to many is the role of this. If you figure out the generosity experience down to a 1 to 1 level, the role of technology is then how you can scale that much more quickly.

37:20

So, a few ways that technology can can do this without kind of overwhelming. You first is think about the copy in your receipts.

37:29

Very tactical thing you can do is change the, you have given X number of dollars on this date to something like you're a generous person because of this dollar amount.

37:43

So notice that the language itself has shifted the object to the person, not the money.

37:48

That is what we mean by rule number one. Focus on people not money.

37:54

You are trying to hammer home that they are a generous person because of the gift that they just gave you.

38:02

Think about all the different ways that you might be able to leverage gratitude, and think about it in a one to many way, you can use social media and snippets of videos. You can use info graphs in your e-mails for donor recognition.

38:17

There's a lot of different things that you can do, and think about the timing of this. Especially if you can set up a Welcome Series to new donors as quickly as possible. There is demonstrated retention impact in getting somebody meaningful gratitude within 48 hours.

38:34

So you could do this through some personalization, especially if you have opportunities in your e-mail platform, or your CRM to do workflow engagement, or other types of interesting, kind of more identity based gratitude. That is something to definitely look into your options there.

38:56

But another exercise is to literally map out what happens when somebody gives slow at the first time. In 48 hours, what is the timeline of every single thing that happens?

39:07

So this is one of the other exercises that, as a takeaway, that I'd encourage you to do, is visualize your own generosity experience, literally map out every step.

39:18

What happens when somebody wants to give and do it from the perspective of your audience?

39:23

That is a really big thing that I learned in marketing, especially, is that you we're not designing for you. You're designing for your audience. If you start with that, then you can think about what they are going to respond best to.

39:37

That will influence and give you a lot of structure to say, OK, I know that I have people who want to donate, who are the typical people who donate to me.

39:47

While it looks like the ones who donate to me online are routing it to this program, well, then that tells you something. So you can use Google has a free visualization tool like this.

40:00

Lucid Chart as well as fake ma, all have free options where you can do this type of mapping exercise, print it out, walk it through, get a whiteboard with your team, and actually start to ask people, well, why do we have it? Why does this take so long?

40:17

I did this at one of my jobs right before Neon, and it was transformative to even just do an audit on the generosity experience itself. If, if that's the only thing that you get out of today is to do this type of exercise, then I feel like I've accomplished something.

40:34

All right, so that actually, I'm on 40 minutes, almost, exactly.

40:41

I'm going to pause for questions. I'll check that out.

40:45

I'll actually, what I'll do is, I do have a really powerful website assessment that we just debuted. You'll, you'll be seeing this in a few different areas. But, this is a really cool resource, and I, what I'll do is, I'm actually going to turn on my all my own webcam.

41:08

So, you could see me.

41:12

For any other questions.

41:14

Because now, there's a face identity, right?

41:20

Alright. Thank you, Sam.

41:24

Well, I, Sam, especially, for, for you. I wanted to be respectful, because it's so late.

41:31

Sam's in the UK.

41:34

OK, What other questions? We got the time.

41:48

What can I answer?

41:52

Or I covered everything in the generosity experience that you'll ever need to know.

41:58

Me see if there is something, OK, because I think I engage Philipps question.

42:06

Open Source technology, things like that.

42:09

Should there always be photos of our work on the homepage?

42:12

I think that there's a lot of data that shows that people centered photos, especially of individuals, have a higher optimization rate.

42:27

I've been reading some really interesting research by Professor RUSLE James.

42:32

And he talks about storytelling Mazing books. I got, he has five different books about it.

42:38

And, and he cited some of this, where even an individual versus group, depending on how you tell that story, can have an impact.

42:47

But more often than not, A Ethically, sourced, that's a big, important caveat here, is, is make sure that, when you're telling these stories, that you're doing so in an ethical way, um, but it can have a very powerful impact.

43:07

OK, let me see, let me expand out, because we've got some good questions.

43:14

Thank you, Kevin.

43:16

I like that. Should there always be photos, greatly exceeded my expectations? No other corners? Thank you, Shannon.

43:21

What it, where is the Google Assessment that you mention? Well, OK.

43:26

So our website Assessment Quiz is here, so you could get that, Carla, and we'll send it out in the e-mail as well.

43:35

And we'll send Sarah, if it's not working in the, the QR Code situation. Don't worry, we'll get this out to you.

43:42

Um, so, yeah, I'm not going to worry too much about that but OK to map out our generosity experience.

43:49

Ah, Google part of Google's Works station.

43:54

I actually wrote it down on something, let me, let me move this Google Design, that's what they call this Google Design um, but FIG Ma and Lucid Chart or other ones.

44:12

OK, let's see, Do you recommend any sort of analytics to understand your donors and donations using your CRM?

44:21

Lot of times, your CRM should have some base analytics, especially depending on how you're structuring your people centric data. Some of them include e-mail, for instance, and so you'll be able to understand open rates and affinity and content engagement and click throughs relating to that.

44:39

So, it might be that, if you're, you're putting together multiple things, to do that, and that's where at least Google Analytics, whatever, go attend another GA for webinar, not this one.

44:52

If you want to understand what's happening there, but, from an analytic standpoint, Google Analytics is still a pretty good thing to focus on for your website Optimization.

45:04

ensuring that the generosity experiences accessible, that's a really good one. There's, there's different ways that we can define accessibility.

45:12

So, we actually, as part of our Generosity Exchange Conference last October, we had a deaf speaker talk explicitly about that topic, katey March of 52 Alliance, and she walked through things like, it takes time to do this stuff, and you have to build processes around this. This is why visualizing your own internal flow that pairs with the generosity experience is another important step.

45:43

But, even saying, we're going to add alt text to our photos, stuff like that, that's where you start. It's these little technical things that are Opportunities that people need to say, this is important.

45:57

Let me build this into my processes in order to make sure that accessibility is top of the line. Now, many of the website tools out there.

46:07

and also donation forms are becoming more accessible and mobile friendly by default. So a lot of the heavy lifting will be done on your part, depending on which route yet you go and how you build your tech stack.

46:20

But even still, simple stuff, like the types of photos that you're using, the, the meta tags for that type of stuff, there's a lot of things that you can do.

46:31

Great question, Terry.

46:36

We're really young and small, non-profit, no staff, and limited capacity, Can you help me prioritize well?

46:43

I think that in that situation, it's important to ask yourself, what is the most important next level step that you want to take for your organization? If you're $50,000, and you're just doing the easy 990, for instance, maybe the next step is to get enough overhead to hire a part-time executive director.

47:07

Right.

47:07

So understanding where you realistically want to go, that's what I would start with Canvas, is go back to your smart goals and ask yourself what is my smart goal for the organization?

47:21

And then what you do is, the way that generosity experience design helps, is that gets you there. It gives you that prioritization to say, I need to start with an audience.

47:33

I need to design what that experience is going to be like for them, and I need to be able to report on that.

47:40

That is why marketing revenue and impact data should be connected. So that's where you think, and that's where you design your smart goal, Camp Canvas, drop me a line, connect with me on LinkedIn, happy to help with this type of stuff.

47:56

What is your opinion to have a carousel on the website homepage? I think Marianna, it depends.

48:02

I think that like the example that I showed with ...: I think it works for them. Doesn't work for everybody. I've seen carousels that are confusing. So I think that it's something that you can test.

48:12

Now, one, don't introduce a carousel, if you haven't gotten the basics of homepage, Design down yet, nail one and check your bounce rates, that's where the analytics like Google Analytics for your built-in website analytics. How long people are actually sitting on your page.

48:30

If you have a lot of people who go to your homepage and then immediately leave, you have a problem. That's where testing comes into play.

48:38

Run it by people, go to grandma, Grandma, I want you to do this thing and give them an explicit test.

48:46

I want you to go and make a donation, or, can you tell me what what we do?

48:53

OK, if your organization, How long should a video message be? Depends on the type of video.

49:01

It depends on the type of video.

49:03

You got about NaN to get people generally, so I'm happy that I 98 a you are still here.

49:10

QR Code worked us diagram That's another good one. If your organization focuses on animal conservation, would it be preferable to use? Well, Colleen, what does your audience respond to?

49:24

Do they like seeing the staff or do they like seeing the animals?

49:30

Your audience will tell you that.

49:33

I have a feeling they like the animals' more than people ask your audience. This is where you can get like a little bit of polling, like Go and this is where donor, like a board member can feel active, right? They could feel part of the experience without kind of weirdly driving everything because you get that one board member that's like, well at my job, we do it this way.

49:54

It's like, yeah, it's not, I don't need your opinion on that. We're a non-profit, we're not a business, so we're gonna run it like a non-profit.

50:01

But I do want your experience feedback.

50:05

Does this make sense?

50:09

OK, How many e-mails in an undying identity based Gratitude Series? can you give examples of the topics? Yes.

50:18

So, that actual resource that I linked to, has the full templates, and things like that. But a good series is probably going to have, you know, maybe five touchpoints throughout, depending on, you know, a week, or over a few months, or something like that.

50:36

Are average donors on the older side Any suggestions will tech be a turnoff. I don't think so.

50:41

Yes, it, it has been recorded.

50:43

Um, I don't think so, Sarah, because there's data that shows generational giving, is evening out that that the greatest generation on down, baby boomers, stuff like that, they go to websites, right.

50:57

The, the typical Facebook user is, is not like me or younger.

51:02

It's, it's the older generations are using things like Facebook, for instance. So I think that that's where accessibility comes into play, the font size, the images, that type of stuff. I'm, a lot of Americans have a disability at this point of physical impairment, so that's where mobile first, people first, it's a really good principle, folks, it's a really good role, people, not money, right? It helps drive a lot of proper decisions.

51:32

We're gonna, We're gonna, You can find you can go to Neon one dot com.

51:36

And we have a ton of resources and guides there, including that, and I can go back, let me see if I can go back on this, and there's the Welcome Series.

51:50

There's the Welcome Series. I know that we're coming up to time.

51:57

Any other questions before I give you a few minutes back in your day?

52:08

Yeah, Well, we'll share this. We'll share the resources.

52:11

For sure.

52:17

All right.

52:20

That's all I got.

52:23

That was quite a bit. Thank you so much.

52:26

You're clearly very experienced and very knowledgeable, and I always appreciate a partner that presents a webinar with practical, useful information.

52:36

So thank you to you and thank you to Neon! Well, thank you. Let me let me formally. Thank you.

52:41

Thank you. Yeah. it's about personalizing it for the audience. Heather, so that's right. That's right. Good, good, good.

52:51

I think that's it. I'm going to set it down, and remember when it wasn't recorded, Tim is going to send you the link to the recording as well as some of those resources.

53:02

Afternoon, OK, fine.

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