Transcript – Episode 100 – [Using CRM to Raise Money and Get Home for Dinner with Melissa Wyers]

Dolph Goldenburg: Welcome to The Successful Nonprofits™ Podcast. I'm your host Dolph Goldenburg. Today, on the podcast we will be chatting with Melissa Wyers about using technology to automate some of your fundraising to make more money and to have more time. A while back, I had the pleasure of chatting with the mother of a dear friend who I have known for a couple of decades, and this woman who was the director of development for a local chapter of a large nonprofit in the 70s and early 80s. She told me how she kept meticulous donor records, complete with contact information, giving history, and personal details like spouse's name, children's name, etc. Believe it or not she did all of this for thousands of people on index cards. Not only that, but she did it in pencil, so they could be easily updated. So, back in the Stone Age of the 70s, that's what CRM was. It was a box or boxes of index cards. Today, though we're going to talk with someone who could have saved that sweet lady a whole lot of hours- if time travel could have transported her back a few decades as well as some software and a modern computer and that kind of thing. Melissa Wyers is my guest today, and she is going to share some secrets for automating fundraising, so you can meet your goals and maybe get home to your family and have dinner. That's a relaxing evening. Melissa has over 20 years' experience working in fundraising marketing and communications in the nonprofit world. Today, she is the executive director of *EveryAction*, a CRM platform specifically for nonprofit organizations.

Welcome to the podcast, Melissa.

Melissa Wyers: Thanks for having me today.

Dolph Goldenburg: As I mentioned I'm delighted you're with, us and I started my nonprofit career about 25 years ago. I did not start back in the days when all of the donors were on index cards, but I did start in a [DOS] environment, and I was an environment that was slowly giving way to the Windows world.

But to say the least. I've seen a lot of change in software for nonprofits during that time, and I'm sure you have as well. Could you say a few words about maybe some of the biggest changes you've seen over the last couple of decades?

Melissa Wyers: I think needless to say the technology has changed a great deal, but I think where the technology is really catching up… I say it half-jokingly, but it's also pretty true. The earliest fundraising you can trace back to the time of Christ. A lot of those techniques have not changed over the years. It's just the technology to get to those techniques per year points with notecards, which was a high-tech technology for a while. I think today you know the real core of fundraising or when you know you're going to really do great as a fundraiser is when you get the right message to the right person at the right time. That's really the holy grail of fundraising. Today, technology is finally to a point where you can use that to help you accomplish that.

I think automation is really one of the ways that coming together, and really automation really requires a good CRM, a good database that you can track all the data that you might want to use in your communications or segmentation going back to your supporters, and not all CRMs are the same. I think you can see that evolution over time, and still today they are pretty robust. If you only do one thing, go find yourself a CRM that will let you put all your data into one database so that you can know that donor and all the different ways that they work with you, not just in terms of their giving (whether that's online donations or direct mail or major gifts), but also if they've come to an event, if they have a plan to gift with you, if they're a volunteer. Do they do campaign every year where they ask their friends to support you? Ideally you want to have all that information in one place and be able to easily go back and use that for segmenting and targeting of messaging. The standard today like it or not it's pretty much Amazon. Most nonprofits have got to be able to be personal in their communications and efficient in their communication ads most people get with purchases on Amazon. That sounds like that would be an easy thing to do, but, especially if you've got a large database, that can be challenging. I think that's where you start is with that good database. The second piece to that is to begin thinking of those different communications areas -

Making them as targeted as you possibly can do that and what information do you need to do that. So, that information, those pieces of data, that becomes your trigger for automation, and the way I think of triggers is I'm going to do a series of communications. Maybe the simplest way to think about is I'm going to do an e-mail series. So, what's my criteria to get somebody into that series? What's the criteria to get somebody out of that series? My favorite example, because I think it's most obvious, is annual renewals with folks. So, your criteria to get into the series is usually “time.” Most of the time people start a renewal series about 90 days before the anniversary of the gift, which would be the expiry date. So, you've got that time, and then a lot of folks have a minimum requirement, whether it's officially membership or what they just consider for an active donor. Maybe that's 25 dollars maybe that's fifty dollars maybe more. That's your criteria to get in: time and amount of gift. Then, for most fundraising series, what gets you out is you make a gift. Once you make a renewal gift, then you're out of the renewal series for that amount of time. The nice thing with renewals is most folks have that data readily available to them. That becomes your trigger for starting your series. You can run your series all year, every month you got a new group [inaudible] days away from expiration. Assuming your [creative] doesn't change much over the course of the year, you really can set that up that you set up that query one time make it dynamic. So, every time you run it, every month, you get rushed at the end, and then those trigger points run for you. There are lots of different examples like that. You can do the triggers that can be more complex. You can have branching and have different options, but at its base level, I encourage everybody to do renewals.

Dolph Goldenburg: Melissa, one of the things I often compare it to - and Millennials often don't get this, but people in their 40s, 50s and 60s do - it's sort of like when you have a magazine subscription typically, three or four months… actually that's not true. Nowadays, it’s six months before your magazine is set up for an upgrade. So, you get a card, a letter or something in the mail that says, “Your subscription to Esquire will end soon.” Then you’re thinking, “I just sent you a check six months ago,” and you throw it away, right?

And then three months before and two months and so on and so forth… Then, for me, because I'm in the private sector and have done fundraising, I don't do a lot of fundraising consulting now. I have done fundraising. I will often let my magazines lapse by one full month so I can get the Armageddon onslaught of, “Oh my gosh, we miss you. Please come back.”

Melissa Wyers: Yeah, I think it is. I think we know it is very equivalent to that. A lot of your donors are going to be in that 40-50-60 range. So, this is going to be super familiar to them and easy to set up. I think some other places that you can go in, and maybe this lends itself even a little bit more to millennials - you ask about changes over time… When I first got in this business a long time ago technically people were active until they hadn’t made a gift for 18 months. That was the criteria a lot of folks used. That seemed to be a real thing. These days I tell people, “If you're at six months, and you haven't clearly demonstrated engagement with people, you're probably going to lose them because the half-life is very slow." So, another example that we do with a lot of clients is help them set up **recapture series**. We always recommend that you test it a little bit with your own data, but we find particularly for folks that have been acquired or giving online, that if you haven't had some sort of meaningful engagement that you can demonstrate in the last 90 days, you should put them in a recapture series. You're in danger of them going away forever. I think that for some groups, the time is maybe even less than that. The nice thing with automation is you can start testing that, and you can say if what you described meaningful interaction is maybe somebody not only opening but, perhaps, clicking on any e-mail, you can give me anybody who hasn't clicked on e-mail in the last 89 days, for instance, and let me start this messaging to try to re-engage some. That works out really successfully for a lot of folks. As a fundraiser myself, I know the one thing that we are always getting around to that we sometimes didn't quite get done was our lapsed program. This can be an easy way to jump into that.

Dolph Goldenburg: When you refer to recapture, is that like 15 years ago what other folks would have thought of as "lapsed donors," or are you referring to something else?

Melissa Wyers: Yeah, I think so. The only difference these days when you talk about lapsed is you've got two ways that people can be lapsed. It used to be you only put somebody into the database who had made a gift.

Now we can also keep prospects.

So, usually it's two separate series, definitely for someone who's made a gift. Again, you have to test into this time. 90 days is the right amount for some people. Six months is the right amount for some people. For some people, it's even less, but usually in that first touch, (to think of kind of a recapture series) you do one of two things. Either (you ask), what got them to engage with you in the first place, or what got them to last make a gift? So, for instance, if you're an environmental group, and you have a number of different campaigns going, and you've been reaching out to this person to try to get their support, and they haven't yet done that, go back to what they first gave to. If they first gave to your polar bear campaign, go back with polar bear messaging. Again, this is kind of that 'right message, right person, right time.' The other way with that is that in terms of the of recapture is [to look at] people who maybe have not made a gift with you before, but they have been engaged with you before. That could mean a lot of different things. They've taken action online with you. They've come to an event. They have forwarded an e-mail to a friend. You could think of a number of different things in terms of doing that. Then, all of a sudden, they stopped, and they aren't clicking on any of your emails anymore. Maybe they're not even opening your emails anymore. Then it's, how do you go back to them and really engage that? There's a number of different techniques to try with them. The biggest thing is to stop sending the same messaging that you have been sending them and they aren't engaging. Send them something new. Different people do things. [Its] worked really well for some people to re-engage. Ask them questions about the issue or maybe even questions about them.

If you haven't asked them to take action before, ask them to take action. It's all you've done is ask them to take action, then ask them to do something else which may be to give a gift.

Dolph Goldenburg: So, when you're using surveys as a way to re-engage donors or prospects, do you suggest two, three, four questions, or do you suggest the longer ones (10 to 15 to 20 questions)?

Melissa Wyers: I think you get if you're trying to re-engage people, you want to do something short. The main thing I really suggest is do something that's going to be really meaningful hopefully to you and to that supporter. One of the groups that do that really use surveys in a really meaningful way is the Union for Concerned Scientists.

Most of their supporters are scientists. So, they do collect information. Do you have a Ph.D.? What topic is it in? Are you tenured faculty? What areas are your expertise? It's really personal information that they're collecting, which most people are excited to share with them, but then they have all that information to really go back in segments and target. The physicists are coming in for a particular issue that's interesting to them. The clan scientists are coming in for something else, and it really helps them make that kind of 'right message, right person' because they collected that extra data to really know who their members are.

Dolph Goldenburg: What about surveying those folks who have engaged? They've forwarded an email they've you know signed an online petition or whatever, but they've never given.

Melissa Wyers: There are two schools of thought. 1) Anything that gets them you know back into thinking about what you're doing helps to do that. The issue is: how can you make that really interesting to that donor? That's what you have to think about a little bit because a lot of times what's interesting to you is not interesting to that person because you do what you do all day every day and you live and breathe it. They do lots and lots of things, and you're just one of their areas of interest. I think if you think about those questions carefully, that can be a great way to help re-engage with people.

Dolph Goldenburg: We did something like that with an organization when I was working with their volunteers. We essentially segmented their volunteers by those who had never given and those who have given. We sent each of them a survey, and one of the relatively short questions was: why do you give or why don't you give? Interestingly enough one of the great lessons that we learned is the number one reason people give to this particular organization is because they volunteer, and the number one reason people don't give to this organization is because they believe their volunteer time is their donation. It was interesting for the work to be able to look at that and go, "OK. There are going to be some people that almost no matter how much of a push we make to give, they're going to say, 'I give my time. That's what I do.'"

Melissa Wyers: That's a great example of really where we are as fundraisers these days. Definitely, when I came into the field, the model that everybody followed was you had this ladder of engagement, and somehow if you were an amazing fundraiser, and you somehow initially got somebody's contact information, and you worked your magic for however long you did, and at the end of their life, they left you their house and gave more money every year. I don't know that was ever a good deal, but it was definitely what we all followed for a long time.

I think it doesn't work at all anymore. When I talk to people, I talk about is the **jungle gym of engagement**. People get on, get off, or just want to go to the top. Some people just want to go to the other side. I think your job as a good fundraiser is to facilitate that pathway that somebody wants to go to. So, just like you said you know people who want to volunteer - and that's all they want to do, and that is their gift if you want to think of it that way, you facilitate that process for them, and you don't expect them to do anything else. The other side of that is some people just want to give you money, and you should just let them give money. They don't have to volunteer or come to events or whatever.

Dolph Goldenburg: I also think part of the lesson learned for this particular organization was to figure out which volunteers who may be a volunteer beyond a certain period of time who are probably never going to give. Then you can more or less start messaging them about giving because they're going to be fatigued by it and are, frankly, no less likely to continue to volunteer.

Melissa Wyers: Yes. I think that's why segmentation is so important. I don't think you change people's minds often in terms of what they want to do. They have a pretty good idea when they come to you about how they want to be engaged with you. Your job is just to give them more of that rather than to try to think that, "You know, you came here to take action, but I really want to make you a donor." Now, there are some people who come, take action, and they're donors, and you want to treat them differently. That's why that CRM is so important so that you can start tracking that in an easy way and go back and segment and send those messages.

Dolph Goldenburg: Those are the ones who are more likely to leave your house. So, if you can, identify them through CRM to cultivate them.

Melissa Wyers: Yeah absolutely. People know from the get-go pretty much whether you really get them or not. When you can have those personal interactions that you know reflect back to them… you know [saying], "You've been with us for six months now. You've been extremely generous. You came in, and you volunteered last month. Thank you, thank you so much." Just reflecting that back to a donor increases retention hugely because it's not a mass mailing or a mass e-mail. It's personal. You know exactly what they've done, and they know that you know that.

Dolph Goldenburg: Right, now at what point is it the right time to kind of let go of the automation and actually write that personal handwritten note to a donor?

Melissa Wyers: As soon as they're able to do that with as many donors as you're able to do that.... I don't think it's probably ever too early to do that. I just think the fact is most organizations are staffed in such a way that the number of those that they can handle in any given week is relatively small as compared to the size of their overall supporter base. I do think automation is a way to be more personal with those folks that honestly, you're probably not going to get around to the handwritten note on them. You can track that personal data, and you can send much more personalized messages to them. Some of them are really easy. I've worked with groups, and one of the easiest things that we do that - if you want to think of it as a bang for the buck - is on the anniversary of their first gift, say, "Thanks Susan so much. You've been a supporter of ours for five years now, and because of your generosity, we've been able to help this many people. You're still making a difference every day. Love and kisses." That is personal. It is reflective, but it's also something that's totally easy to automate. You can set it up so that it's made to happen 365 days a year if you want to do it that way. If that seems a little bit too ambitious, you could do a monthly and get everybody once a month. With that level of personalization - it's not handwritten, but it makes a difference.

Dolph Goldenburg: I've always loved the idea of donor-versary cards, and I am surprised that more organizations don't use them.

Melissa Wyers: I agree. I think the things they really mean a lot to people.

Dolph Goldenburg: I understand why the largest development shops can't personalize it with real signatures from the executive director or whatever, but if an organization only has (I'm going to make this up) 2000 donors, the chances are the ED's probably could sign those donor-versary cards because you're only talking 40 a week. You can do it while you're doing something else.

Melissa Wyers: Every opportunity you have to make that interaction with your donor more personal, it's going to be to your benefit. I think like you said with really 2,000 people 40 a week, that's really doable. That's probably 15 minutes of an ED's time. In terms of the returns, you'll get for that kind of personalization, it's well worth it. Even in more mass communication, the technology is there. Printing has changed a ton. Telemarketing has always been personal. Certainly, email can be personal, and it's [about] taking the time to think about what you can do. The technology is not your limitation; it's often times the imagination of the person who's running the program.

Dolph Goldenburg: Absolutely.

Melissa, we're going to take just a short break, and when we come back we're going to dive in and see if there are some other things that we can maybe automate to make our donor experiences better.

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I have a very favorite piece of customer relationship management that would fit nicely with that Stone Age CRM that I talked about in today's introduction. It's decidedly old fashion, and it's not automated, but I think it is well worth the time and hassle to do it. I'm talking about the printed thank you letter with a real signature on it. Now, you might ask, "What's old fashioned about that? You can generate an acknowledgment letter from whatever CRM program you use, and it's easy for anybody to sign them." That's true, but it's really hard to fake a smudgeable signature and note at the bottom, and it's really hard to fake your executive director or development director or development associate's signature, whoever ultimately ends up signing the letter. I've just got to share with you that, for me as a donor, it means the world to me to get those types of letters. So, one of the things I would encourage listeners to listen to is our bonus break titled Thanking Donors Like You Mean It.

We're going to include that in our show notes today.

Dolph Goldenburg: Hey, welcome back to the podcast, Melissa. So, we have talked about automating renewals and automating recapturing lapsed donors. What are some other things we could be using CRM to automate what we are not?

Melissa Wyers: I think one of the big opportunities for automation is sustainer programs. I think at every point in the Sustainer journey, one of them is with just doing the initial invite to the Sustainer program. Again, you might want to test into this a little bit. Some of the obvious things you want to do is maybe soon after the first gift, maybe right after the first gift is to ask them to become sustainers. Certainly, if they make two gifts in the first six months, that would be another good trigger to invite them to become sustainers. So, you can start an automated communications series on whatever point you decide the trigger should be, whether it's the next gift or something else that can happen.

The other one that's easy to do is as credit cards are expiring or about to expire, particularly if you aren't using credit card updater, which would automatically update those credit cards for some people… It's easy enough to set up a query to say, ‘Give me everybody whose credit card is set to expire in the next 30 days.’ You can easily start an e-mail series that says, ‘Please upgrade your credit card. It's going to run out.’ If you have a system where you have some sort of donor portal or someplace where they can go online and upgrade it themselves, that's terrific. Other folks, it's a 1-800-number that you have on call. Either way that's one that really pays for itself in terms of those donors.

The other thing that I think you can do with sustainers and other programs frankly, that they think folks don't do enough is think about cultivation series. Dolph, to your point I really agree. You cannot possibly say thank you often enough, and somehow, in the midst of appeals and renewals and everything else that sometimes gets pushed off, you can sit down early in the year with your team and think about the things that tend to really inspire your donors and make a difference. Usually, which is some variation of how the support they're giving you is letting your organization do amazing things for other people. I think groups put together fairly simple things that are really meaningful. For instance, you could find twelve great photos that reflect the work that you're doing, put a little caption on them and set that up as a series that goes out every month to supporters. They just want to show you thank you and want to show you how you're making a difference.

It's pretty easy for you to set up. It’s short and sweet for supporters that they've had that touch with you that makes them feel important and makes them realize that you haven't forgotten and that your gift means enough to them to reach out to them again.

I think a third place that I've seen automation work really well is for groups that are starting those mid-level donor programs. So, these are people who are maybe giving you between a hundred and a thousand dollars a year. So, they're not quite major donors, but they're definitely the top level of direct response donors. Once you begin giving them some special treatment, oftentimes this is giving them maybe more detailed information of, again, what your organization is doing and how their support makes that possible. Sometimes, it’s a longer letter or longer e-mail that goes into a little bit more detail than you might do with your other folks. Sometimes, it's just reminding them of how generous they've been and that they're part of this special group of people who support at a higher level. Creating kind of that messaging can be done very well with automation starting with the invite into this group and then noticing when they make those gifts if they do other things that they might volunteer or come to events or anything like that - also noting how they're engaged with your group beyond just their direct support.

Dolph Goldenburg: Some of the other things that I have seen automated that I think are really effective are almost like when donors cross a specific threshold that it now rises to the level of, “Oh, somebody needs to pick up the phone and say thank you. Somebody needs to pick up the phone and say, ‘Oh my gosh, we messed up.’” Those are the kind of things you can automate, too. So, like maybe for some organizations, a thousand dollars is of a major donor. If you've only got (to make this up) 26 of those, chances are somebody can pick up the phone and say thank you for every single one of those guests, and it can be automated so that an alert goes into someone's e-mail.

Melissa Wyers: Yeah. I think that's a great idea. The other thing that I think can be effective also is using volunteers to make some of those calls and sometimes some of those Thank You’s. I don't think it always has to be from the executive director, but a with long-time volunteer with the organization, you can automate that. So, they get them every week, and they just go through it. A lot of times donors really appreciate the conversations with volunteers. That's one thing that's not on your plate, right?

Dolph Goldenburg: That's also a great use of your board members’ time.

Like, if you ask board members to come in 15 or 20 minutes before the meeting, and either you have Thank You notes that they can write or some of those calls they can make using their cell phone or using phones that are at your organization… That's a great use of board members’ time. Donors are always excited when a board member calls or sends a note to say thank you. The added bonus for your board and for your staff is that means your board members will be on time for the meeting. Even if they're five or 10 minutes late for the thank you part, they'll be there for the meeting.

Melissa Wyers: You’re totally right.

Dolph Goldenburg: Sorry. I know. I know that makes me sound cynical, but it does mean that they’ll be there on time.

Melissa, the other thing I kind of wanted to ask you about - I have seen CRM do this really well, and I'm often surprised that organizations are not doing this. This is probably more major donor technique, but almost every CRM either has a way for you to blind copy e-mails to a constituent that are personal. If I open up Outlook or Apple Mail and send an e-mail to a constituent, it has a way for me to blind copy that into their record just by putting a specific address in the BCC section. Now, that email is always there in the CRM. So, if I leave, it's not like someone has to have access to my e-mail to see that I had a conversation with Michelle about something. It's just in the CRM.

Melissa Wyers: Yeah, I think that is a base requirement of any CRM that anybody would purchase at this point in time. Being able to go back and everything from when I was doing major gifts, you have those long-term terrific donors, and it would come their birthday again. I would think, “Oh, what card was it that I sent them last year?” so I don't send them the same one. With just being able to pull that data into here's the CRM, even for your sake, you want to have that information for the organization.

Even just for you so that you can keep those conversations you know as personal and relevant as possible, bringing all that into your system is super important.

Dolph Goldenburg: Yes. And I agree with you.

I think it's often the small and medium-sized organizations that maybe have one or two people in development, and, yet, the executive director is playing a role in development in terms of cultivating major donors where I don't think that happens as much, where the communication with your major donor by e-mail or by card is not being documented in the CRM.

Melissa Wyers: Right. Your executive directors are involved heavily in the fundraising.

They would do their calls. They would do their emails, but they'd never give me very good notes about it. Other than that, it was done. So, being able to have that BCC so I can see exactly what they said was done is super helpful.

Dolph Goldenburg: Melissa, it's interesting you say that. I got to share this with you right now. One of the things that I do as part of my consulting practice, I'd say once every couple of years I end up as an interim somewhere. So, right now, I'm an interim executive director in New York, and I'm one of those CEOs that love's doing the Hour of Power/ the Dialing for Dollars twice a week where I'm calling major donors. I love that part of the job. What I do is invite the development assistant to come and sit in the conference room with me while I make the calls, and what she's taking notes; she's not caring about what the other person saying. Based on what I'm saying, she's taking notes, and then all of that ends up in the CRM. So, if you're the CEO that's really too busy, I promise you someone in your development function (your development director, development assistant, etc.) will be excited to make sure they capture that information for you.

Melissa Wyers: Yeah, you're right.

Dolph Goldenburg: So, I just I had to throw that one out there because to me that's an easy one. There should be no excuse for call notes to not be in the CRM.

Melissa, thank you so much for coming on the podcast. I'm not going to let you go until I ask you the Off-the-Map question. Now, you and I share a city. You may not be aware of this because you went to Emory University and I live in Atlanta, Georgia.

We share Atlanta a little bit, but I'm actually not going to ask you a question about Atlanta. What I noticed is you majored in Political Science and Art History at Emory. So, my question for you is: what artist, living or dead, would you most want to have dinner with and why?

Melissa Wyers: That's a good question.

Oh, there's so many to choose from. A real favorite of mine is Henry Matisse. From everything I've read, he was not only a great artist but a delightful individual. I really love. I love his work in a lot of ways. I love his color, but what I've really appreciated about Matisse is that he was somebody who kept working even as he got older. Even as his eyesight got to where he really couldn't paint like he did when he was younger, he started cutting. He did these amazing cutouts really late in his career. I just found that to be really inspiring that creativity can overcome all sorts of other limitations, and if you really had that in you, you're going to find a way to express, even if you don't have all the facilities that you might have had at an earlier point. So, I would love to have dinner with them.

Dolph Goldenburg: That would be a really fascinating dinner wouldn't it?

Melissa Wyers: Yeah.

Dolph Goldenburg: Melissa, I have so enjoyed our time together today. Thank you for sharing your expertise about fundraising automation and how it can help our listeners add time to their day. So, listeners, you can find Melissa at www.everyaction.com, and while you're there, I would suggest that you click on the client's link and check out some of the amazing Every Action heroes that they have worked with.

Melissa, thank you again for joining us today.

Melissa Wyers: Thank you for having me. This was great.

Dolph Goldenburg: If you have been busy sheepishly shuffling around the index cards that serve as your CRM and couldn't find your quill and ink to write down the information from today's show. Fear not, dear listeners. You can get Melissa's contact information, URL, and everything at our website www.successfulnonprofits.com. Just click on the show notes, and it will be there. Now, might I suggest that you employ a piece of modern-day technology and share the link to this podcast and your favorite moments from it with a few hundred of your closest friends via social media? I would be incredibly grateful for your doing so, and if you wanted me to be even more grateful, you could write us a review on iTunes, Stitcher, Libsyn or your podcast streaming app of choice. I would certainly appreciate that, too. That is our show for today. Thank you for listening. I hope you have gained insight that will help your nonprofit thrive in a competitive environment.

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