Let Your Customers Do Your Marketing

You can turn your customers into your most fruitful partners, getting them to promote your services for you, explains Bill Lee in *The Hidden Wealth of Customers* (Harvard Business Review Press). You probably already have some sort of referral program, for example, giving people a way to tell their friends about your organization. But you can take that program much further.

To see if you're making the most of your donors, volunteers, and other customers, ask yourself these questions:

Do you know who your most passionate supporters are? Have you asked them to market your organization in a variety of ways, such as blogging, tweeting, giving speeches, providing contacts and access to new sources of information, hosting events, giving interviews, testing and commenting on your new offerings, and giving feedback to improve your services or develop new ones?

Are you sure that your fundraisers have the references and testimonials they need to attract new supporters?

Do you view journalists as important customers, who can disseminate information about your organization through articles, blogs, webinars, and teleconferences?

How many of your once-enthusiastic customer references have you lost due to a poor customer reference process?

How well do you measure the impact of people's help in talking about your organization and finding new supporters? Do you have a way of thanking and rewarding them for their help?

Do you create events to provide your customers a range of opportunities to interact with each other and with prospects?

How much of your Web site talks about your customers rather than about you? Do you test for and determine the optimal mix of customer content on your site — such as testimonials, case studies, articles, aggregated customer outcomes, and results data?

Do you understand how much funding or other value is created by your online communities? What contributions have these communities made to new service development for your organization?

Creating Scenarios for Multiple Futures

In these days of instability, traditional strategic planning serves little useful purpose, as witnessed by the number of plans sitting on shelves. One way to recognize the unpredictability of the future is through scenario planning.

Scenario Planning in Organizations: How to Create, Use, and Assess Scenarios by Thomas J. Chermack (published by Berrett-Koehler Publishers, bkconnection.com) provides a theoretical foundation of scenario planning, but also much more. It offers suggestions for putting scenarios into practice and for supporting organizational change.

Thinking like a scenario planner is different from linear planning. Participants need to be coached and guided through the process. Then they can explore various scenarios and implement the most appropriate ones.

Scenario planning, used well, avoids problems caused by shifts in the organizational environment and takes advantage of opportunities not always obvious. By its nature, it heightens leaders' awareness. Planning is complex and ambiguous, but this book demonstrates a method of tackling it in an orderly way suitable for today's unpredictability.

– reviewed by Terrence Fernsler

Tailor Your Ask according to Generational Needs

Are you optimizing your outreach to connect with all generations of donors? "The Next Generation of American Giving" (www.blackbaud.com/nextgen) suggests ways to design your fundraising strategies for optimum benefit:

Collect donor birthdays. It's vital to create special messages for each age group. First you need to know when each donor and prospective donor was born. The more you know about people, especially what generational bracket they fall into, the greater your ability to appeal to the topics that drive engagement and contributions.

Ask people what they want. Consider adding a link to a survey on e-mail autoresponders or in a welcome series e-mail. (See "Tap into the Passion of New Constituents with an Online Welcome Series," Vol. 31, No. 1, www.NonprofitWorld.org/members.) Events are also an ideal venue to poll constituents about what's important to them.

Facilitate peer-to-peer fundraising. Generations X and Y are especially receptive to this way of raising money on an organization's behalf while incorporating crowdsourcing and personal networks. (Take a look at "The Peer-to-Peer Fundraising Evolution," Vol. 30, No. 6, www.NonprofitWorld.org/members.)

Take advantage of social media channels. Using social media as an engagement tool is now considered Fundaising 101. Draw on social media, such as LinkedIn, to promote your Web site and capture e-mail. Ask donors for feedback on what information they want and how well they think your organization is serving its mission. (See "Three Benefits & Two Risks for Nonprofit Leaders Using LinkedIn," Vol. 31, No. 6, www.NonprofitWorld.org/members.)

Build your sustainer program. Sustainer donation programs are gaining traction across the nonprofit space. Boomers, sandwiched between caring for aging parents and raising children, are ideal for sustainer giving programs, which are a convenient and time-saving way to support charities. Tailoring your ask to those constituents most likely to support an already growing trend will build confidence that you understand the unique needs of each audience. (Check out "Secrets of Sustaining," Vol. 21, No. 2, www.NonprofitWorld.org/members.)

Building Bonds

To create an extraordinary organization, view all your customers — everyone from clients to volunteers — as partners. *Wired and Dangerous: How Your Customers Have Changed and What to Do about It* by Chip Bell and John Patterson (Berrett-Kohler Publishers, bkconnection.com) suggests ways to create close ties with your stakeholders:

- **Create a shared vision** — a common purpose and view of the future around which people can rally, not just once in a while but on a daily basis.
- **Whenever someone talks to you, listen — not to make a point or offer advice but to learn and understand.** When you simply listen to people, they grow to trust you because they feel heard and valued.
- **Be totally honest.** When you make a mistake, own up to it quickly.
- **Conduct surveys and focus groups with diverse participants** to ferret out what people really want from you.
- **Design your Web site and telephone system to make it easy for people** to get answers to their questions and to connect with a real human being as effortlessly as possible. Make it clear that you're eager to interact with them and help with their concerns. Frustration with a complicated Web site or endless voice-mail spiral is a sure-fire way to lose someone's loyalty, respect, and trust.
- **Thank people often, from your heart.** Never take them for granted. Find creative ways to show your appreciation.
- **Hold periodic check-ins to explore what's working and what's not.** Put early warning systems in place to alert you to problems before they get out of hand.
- **Respect people's time,** and make it clear that you understand how valuable it is.
- **When things go wrong, apologize** swiftly. Be sure to repair not only the problem but the relationship. Do whatever is needed to soothe hurt feelings.
- **Take advantage of the way the Internet and social media let you connect with people** in a global yet personal around-the-clock fashion and enlist them as advocates for your cause. Don't think of technology as a substitute for personal connections, however. Meet people face to face whenever possible, and if you can't, find ways to add personal touches to your Web interactions. Elicit people's ideas, thank them for their input, and follow through on their feedback. Small touches make a world of difference.
- **Be sure to add fun,** laughter, and joy to the mix.

A large part of forging successful relationships is giving your customers what they want, and the best way to find out what they want is to ask them. Here's how to create a survey people will actually complete:

- **Alert** people that a survey is on its way, and explain its importance. Let them know why you're conducting it and why their input is crucial.
- **Make it short** — no more than 10-12 questions. Design it to sound like a conversation between you and the respondents.

"Small touches make a world of difference."

- **If you mail the survey,** use a real stamp, and make the envelope look interesting and intriguing.
- **Let people know** the results of the survey and how you plan to use that information to improve your organization.
- **As soon as possible, implement** changes based on the survey results, and keep people in the loop about your progress toward those changes.

Why and How Givers Get Ahead

Groundbreaking studies show that people's success is tied to their preferences for reciprocity. Based on these preferences, Adam Grant explains in *Give and Take: A Revolutionary Approach to Success* (Viking Press, penguingroup.com), we can divide people into three types:

Takers (who put their own interests first)

Givers (who are other-focused, paying attention to what others need from them)

Matchers (who strive for an equal balance of giving and getting).

Givers get ahead because of choices they make in four key domains:

Networking. Givers seek to help a wide range of people without worrying about getting a return, while takers and matchers network strategically, expecting returns that exceed or equal their contributions. Thus, givers not only have much larger networks, but their networks grow and spread more quickly, enhancing everyone's success.

Collaborating. Givers see collaboration as a source of strength, a way to harness the skills of many people for a greater good. Takers and matchers collaborate mainly to gain more for themselves and aren't as likely to share credit as givers are.

Evaluating. Givers evaluate other people much more positively than takers or matchers, who tend to place little trust in others. Leaders who are givers see the potential in their employees and colleagues and bring out the best in them. While givers and matchers often strive to be the smartest people in the room, givers are receptive to expertise from all those around them, thus enhancing their own success.

Influencing. Takers and matchers try to influence people by gaining dominance over them. They specialize in *powerful* communication — speaking forcefully and expressing certainty. Givers adopt a style called *powerless* communication, showing plenty of doubt, asking lots of questions, and relying heavily on advice from others. Instead of telling others what to do, they ask people what *they* want. By expressing their own vulnerability and giving power to others, givers build authentic prestige.

Three Steps to Effective Time Management

The best way to manage your time is to create rituals that you repeat every day, no matter what, according to the *HBR Guide to Getting the Right Work Done* (Harvard Business Review Press, www.hbsp.harvard.edu). This three-step ritual will keep you focused on your priorities so that you're as productive as possible:

1. **First thing every day, take five minutes to write down what you want to accomplish.** Schedule those things into time slots on your calendar, with the hardest and most important items at the beginning of the day.
2. **Set your watch, phone, timer, or computer to signal you every hour.** When the signal comes, look at your list and calendar. Ask: Are you doing what you most need to be doing right now? Recommit to how you're going to use the next hour.
3. **At the end of your work day, review your list and calendar.** Notice what worked and what didn't. Use what you learned today to be more productive tomorrow.

How to Create Win-Win Partnerships

There is an extraordinary amount of opportunity for nonprofits willing to create cross-sector partnerships, says Bruce Burtch (bruce@bruceburtch.com) in his helpful guidebook *Win-Win for the Greater Good.* Here are a few of his tips:

Hold a brainstorming session to identify potential partners. Search their Web sites looking for employee volunteer activities, community relations, mission statements, and other information. Research each prospect thoroughly.

Use LinkedIn to find profiles of executives working for organizations of interest. Find people within your networks who are connected to those executives, and have them create connections.

Search the Internet for organizations, projects, or campaigns that involve your area of interest. If you're not in competition with them, the people involved will gladly share ideas. The most important questions to ask are: Where did something go wrong, and why? What obstacles did you need to overcome? What were your main challenges? Would you collaborate with us as we begin our project?

Determine exactly what your partnership aims to accomplish. Limit your effort to a specific goal. Have a clear understanding of how others are addressing similar issues.

Identify and understand the various audiences you want to target. You must reach those who can influence, donate, or participate in your endeavor. Design your message so your audiences understand the problem, believe in your solution, and feel called to action.

How to Make Your Case for Planned Giving

Since 2008, the Stelter Company has been polling planned givers and planned giving prospects to better understand who they are and what motivates them to make a planned gift. During a recent session sponsored by the Greater Cincinnati Planned Giving Council, VP of Business Development Nathan Stelter shared some of these insights. Here are key take-aways for nonprofits:

- **Start communicating with prospects earlier.** It bucks conventional wisdom, but the time to talk to supporters about planned giving may be in their 30s and 40s, not their 60s and 70s. According to the Stelter Company's findings, the average age for a bequest donation is 48. As people begin their estate planning earlier, it's important for nonprofits to capitalize on this planning phase. Once people have made their decisions, it's difficult to change them.
- **Target donors based on their engagement, not just their giving history.** Of people surveyed who had already made a planned gift or had a specific intention to do so, nearly 20% had no giving history with the organization. And many had been on the donor rolls for only a few years. So keep an eye on affinity and engagement metrics. After all, planned gifts are a hope for the future, not necessarily an indication of current giving capacity.
- **Speak about planned giving in a way people can understand.** In a 2009 poll, 62% of donors and planned givers weren't familiar with the term "planned giving." The jargon can easily confuse and overwhelm. So keep communications simple and straightforward. Donors are looking to you more for the inspiration and motivation to give than for advice about how.
- **Alleviate fears that prevent donors from reporting their gift.** Of planned givers surveyed, only 36% had notified the nonprofit of their plans. Why? Fear that their plans might change and fear that they would receive an onslaught of communication from the nonprofit. Being open and direct in planned giving communications can help to head off such fears, which keep nonprofits in the dark.
- **Introduce donors to planned giving by mail:** 42% of donors and prospects reported a preference for receiving initial information about planned giving in the mail. They like having something tangible to include in their estate planning files or to take to a meeting with a lawyer or financial advisor.

As with all fundraising advice, don't scrap your current planned giving strategy. Do use these insights to refocus your work and identify more effective ways to secure planned gifts. For more information, visit bluecranecreative.com and stelter.com/research.

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Understanding the Effects of Immigration

The United States is in the midst of an immigration wave that is altering our demographics. *Immigration, Poverty, and Socioeconomic Inequality* (published by the Russell Sage Foundation, www.russellsage.org) takes us on a journey through those changes and how they're affecting the socioeconomic status of immigrants.

About one-sixth of the poor in the United States are foreign born. There are important immigration and poverty differences between national-origin groups. There are also differences in poverty rates and economic opportunities between adult immigrants, their children who immigrated with them, and their children born and raised in the United States.

Today's common image of immigrants is of low-wage undocumented workers who are relying on government subsidies and reducing employment opportunities for the native-born by accepting jobs at much lower pay rates. However, because of very limited access to anti-poverty programs, most immigrants rely only on their earnings. Many documented immigrants are high wage earners. Studies reported in this book show that poverty overall is not explained by immigration trends. There is very little impact from immigrants on the poverty rates of the native-born. Highly educated immigrants may even help reduce native poverty rates. The book explains other important links between immigration and poverty:

Legal status has an impact on immigrant poverty, since regularized status allows immigrants, and especially their children, to participate fully in society, in particular improving educational opportunities.

Segregation of immigrants limits English-language skills and, as a result, labor market opportunities and mobility.

Much of the disenfranchisement of immigrants has to do with race. Access to anti-poverty programs has more to do with who lives in regions or states regardless of legal status.

Moves to new destinations, such as smaller cities and rural areas, decrease immigrant poverty rates, but may also decrease access to anti-poverty programs for everyone in the new destinations.

Stricter state regulations on immigrant employment, intended to improve employment for native-born workers, actually have very little effect on job opportunities.

Poverty is one of the most difficult social problems today, and affects many other social concerns. This compilation of research will help nonprofit organizations better understand the impacts of immigration on poverty and inequality, and then make better policy choices concerning poverty-related issues.

– reviewed by Terrence Fernsler

laughter alert

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