Tell Me a Story:

The first step to revitalizing your programs—or starting new ones—can be as simple as asking, "Tell me the story. . . ."

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"We didn't learn anything we didn't already know." "We came out with far more questions than answers." These are the frustrating conclusions that many nonprofit executives reach after spending thousands on market research. The report goes into the drawer, but the problem remains unsolved.

Why does market research frequently fail to provide desperately needed insights? A primary reason is that it usually involves asking questions you presume are important of people you presume to have the answers: If you ask the wrong questions or the wrong people, you won't get the answers you need. For instance, Coca-Cola conducted 190,000 taste tests on New Coke, but these never showed that taste wasn't the key issue. One detergent manufacturer asked hundreds of homemakers what they thought about individual packets combining detergent and fabric softener, but this family-oriented research never revealed that the product's greatest appeal was to single people.

Using Case Studies to Discover Unmet Needs

What Is CCR?

Customer or constituent case research (CCR) is a type of research that understands the market. Instead of asking participants pre-determined questions that reflect your assumptions about what's important, CCR asks people to tell—in their own words—the stories behind their involvement with your organization. It lets *them* define what's important, as they lay out detailed who-what-where-when-why stories of:

- how 50 donors made their decisions to contribute to a new theater group
- how 25 patients decided to use the services of a women's clinic
- how 20 alumni decided to become members of their local alumni chapter
- how 10 people decided to become volunteer docents for a historic house museum
- what made 30 families decide to visit the zoo on Easter Sunday.

When You Don't Know What You Want to Know

CCR digs out the stories of real decisions made in the context of real financial constraints, time pressures, and personal conflicts. As CCR pieces together the chains of people, influences, and events that lead to key decisions, researchers find links to possible future opportunities, such as:

- Did this person seek membership in order to fulfill needs that we didn't know members had? If so, could we restructure our membership program to better fulfill these needs? If we strongly communicated these membership benefits, could we increase our membership price?
- Could we strengthen any weak links in the chain of events leading to this person's decision to volunteer? For instance, did this volunteer encounter any obstacles in working with us that we hadn't suspected but could remove?
- What circumstances or events led previous board members to their involvement? Do these suggest better places to seek prospective board members, or ways we can design their roles to be more rewarding to both them and the organization?

As these stories unfold, unanticipated motives, circumstances, and behaviors emerge, and opportunities are revealed. A few examples:

Gain Insights about Mission.

One nonprofit's mission was to promote appreciation and preservation of its city's architecture. It provided architectural walking tours, lectures, and exhibits and operated a gift shop. It decided to work with a local boat tour company to offer "architectural boat cruises" presenting the city's architecture from a new perspective.

First, the nonprofit surveyed boat-tour passengers asking such questions as "Where are you from?" and "Please rate your interest in architecture on a 1 to 5 scale." From this survey, it learned: (1) A lot of people came from the local area, and a lot of people didn't. (2) Virtually all participants checked "interest in architecture" as a "very important" or "extremely important" reason for taking the cruise. But this information didn't lead to any new ideas for filling its boat.

Case research on 50 passengers embarking on these boats, however, showed that architecture actually played a small role in getting them there. When asked why they were taking the boat ride that day, most pointed to the people standing next to them and said something like, "My cousins are visiting from out-of-town, and I needed a way to entertain them." It became clear that, on bright summer days, far more people have a compelling need to entertain visiting guests than to learn about architecture.

This insight prompted new thinking in many directions and at many levels. First, it suggested a powerful new communications theme: Instead of promoting the charm of the boat or the numbers of buildings passed, advertising could address a big problem faced by tens of thousands of people: "Our folks are coming to visit. Where can we take them?"

But more important, this insight led to breakthrough thinking in this organization's decisions on how to fulfill its mission.[2] Many of its staff, board, and volunteers were at first discouraged to hear that most passengers were seeking to entertain friends—not learn about architecture. They were unhappy that the rich architectural expertise of the tours was apparently being wasted on these people.

But then they realized that this was in fact a tremendous opportunity to expand their mission: Those participating in their walking tours, exhibits, and lectures *already* had strong interest in architecture before attending; these programs were "preaching to the converted." In contrast, CCR showed that the boat tour provided an unprecedented opportunity to excite interest in architecture in many people *for the first time*.

Thus, the existing tour content—lists of architectural styles, dates, and architects—needed to be rethought. It had to be redesigned to open eyes and kindle excitement in architecture for the first time. Having used the boat ride to kindle that enthusiasm, the organization could then move this new audience to its more advanced walking tour, exhibit, and lecture programs.

Forge New Relationships.

Another example: One long-established, national nonprofit organization had 75 chapters covering the entire country. Forty years ago, the umbrella organization and the autonomous chapters established a support service wing. This wing allowed them to buy services that all chapters required, and to design and provide services tailored to their unique, common needs. The chapters owned this service wing, and 20 chapter presidents formed its board of directors. They met formally with the president of the service wing quarterly, and talked informally with him more often.

Thus, this service organization had a small, focused customer base of only 75 "clients" and strong, top-level links with it; it's hard to think of how to be closer to constituents. But by the time case research was undertaken, the chapters were acquiring 85% of these services elsewhere. The last three services this organization introduced—each eagerly proposed and advocated by vocal chapter presidents—didn't attract a single buyer.

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Case research began by interviewing 20 owner/client presidents. Each discussion started, "Tell me the story about how you decided to purchase each service we offer."

Astoundingly, the presidents usually answered, "I'm not sure. I haven't been involved in making those decisions for years."

Sometimes, the president didn't even know who *was* responsible for making the choice. The case researcher frequently had to spend hours in each organization tracking down the real decision-makers for each service. When he found them, he often encountered anger. They resented the service organization for ignoring them and dealing only with their presidents. Many actually went out of their way to avoid working with the organization that their chapters owned!

As these chapters had grown over 40 years, decision-making for most services had moved down in the organizations. The service organization, however, was still communicating only to the top. Slowly evolving change is often harder to recognize than overnight change. CCR helped this organization learn that it needed to establish new relationships if it was going to succeed in its mission to support the chapters.

What's Wrong with Surveys & Focus Groups?

Why not just do a survey or run a focus group? Both these nonprofits thought they'd gotten close to their constituents—one through a survey, the other through feedback from chapter heads. But both were wrong. Surveys were ineffective for the first organization because no one dreamed that people would take an architectural tour for any reason except architecture—and so nobody included survey questions looking for such motives. And for the second organization, feedback didn't work because no one realized that the presidents were no longer the right people to contact.

Although both these problems appear painfully obvious in hindsight, they had been blind spots until CCR focused its spotlight at them. CCR helped these nonprofits get "outside the box" that limited their thinking.

CCR can be applied to gain breakthrough insights into all your constituents: donors, members, board members, volunteers, staff, clients, and customers. Take the attitude of an investigative reporter and dig into the stories behind their involvement with your organization. The first step to revitalizing existing programs—or starting successful new ones—can be as simple as asking: "Tell me the story behind your decision to contribute/volunteer/attend......." ■

Footnotes

[1] See Berstell and Nitterhouse in "Selected References."
[2] For more information on constructing and expanding your mission statement, see Vogt in "Selected References."

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*Starred publications are available through the Society for Nonprofit Organizations' Resource Center. For ordering information, see the Society's *Resource Center Catalog,* included in this issue, or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).

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