Nurture & Grow

the inspiration to give

Experience Management For Donors

An Endeavor Management Company
Thriving in Today’s Fundraising Environment

Grow
Share of Voice

Maintain
Clarity of Message

Communicate
Real Impact of Gifts

Deliver
Personalized Experiences

Inspire
Staff & Volunteers
Strategic Experience Management
Our Approach to Managing Donor Relationships
Culture and your brand promise are linked through the experience delivered.

Leaders translate customer expectations to the organization and reinforce desired employee behaviors. They also set priorities such as market expansion and new streams of revenue.

This alignment creates an exceptional experience and a sustainable competitive advantage.

We call this desired state enchantment.
Sustained Engagement

1. Discovery
2. Planning
3. Action

- Reinforce
- Listen
- Define
- Deliver
- Promise
1. Discovery

Our innovative techniques will capture deep insight into donor perceptions, attitudes and behaviors and enable strategic decision-making by helping you answer questions such as:

**Build Awareness**

What is the most effective way to amplify our efforts and grow share of voice?

How do we increase awareness of our cause, attract new donors and build a positive, trusted Brand?

How do we improve our ability to identify, prioritize and target donors and potential donors?

How can I optimize marketing channels, tactics and fundraising activities to reach my target audience?

What messages resonate with our donors and motivate giving to our program?

**Increase Donations**

Do we currently offer a seamless experience for donors across channels and media (online, mobile, direct, mail, email)?

Are we delivering the ideal experience and performing consistently across all touchpoints and interactions?

Do we provide the information donors need to understand the donation process and to make giving easy?

To what degree are we able to demonstrate the impact of giving in a way that donors feel their contribution is making a difference?

How do we inspire donors to give, give more and give more often?

**Grow Relationships**

How do we build lasting sustainable relationships with our donors? In what way do donors want to be engaged after giving?

How do we assess, track, facilitate and accelerate positive word of mouth recommendations and advocacy?

How can we nurture potential and lapsed donors?

What are the best methods to encourage collaboration and communication with our donors?

How do we extend the value of giving beyond the initial gift?
Examples of Discovery Tools

- Individual Interviews
- Online and In-Person Focus Groups
- Segmentation Study
- Quantitative Study
- Culture Assessment

- Digital Touchpoint Assessment
- User Experience Testing
- Ad Concept and Message Testing
- Social Media Ethnography and Community Profiles
Armed with deep customer insight, your team can incorporate learnings to design the ideal experience, create meaningful messages and inspire staff and volunteers to deliver the ideal experience:

### Personas

**Committed Couple**
- Researches (internet) before committing to give
- Averages 5-6 years of giving once committed
- Gifts are typically disease specific and prefers research organizations
- While cause is chosen by the wife, both have a role in determining the size of the gift
- Prefers giving online but enjoys printed materials and magazines

**Sue and Jim Neighbors**
- Middle 50's to Late 60's
- College Educated
- Executive Professional or Retired

### Experience

- Identify internal challenges, process issues and staff pain points in comparison to donor perceptions at key touchpoints and interactions.
- Prioritize high impact touchpoints for improvement.

### Transform

- Care
  - Expected Behaviors
- Coordination
  - Processes and Technology
- Communication
  - Key Messages and Call Models
Inspiring with Role Clarity

Inspire and motivate stakeholders to deliver the ideal experience by tapping into their individual strengths and motivations for development related activities. Our facilitated workshops help your staff appreciate and leverage their unique strengths and the strengths of their team members. This team-based approach is orchestrated by a strategist.

Maven
- Convey understanding of mission and vision
- Educate on the elements of case
- Offer credentials that build confidence
- Share wisdom on related themes
- Community presentations
- Encourage confidence in closers
- Attend key solicitations
- Celebrate gifts

Closer
- Affirm work of connectors and mavens
- Empathize with prospect situations, interests and personal passion
- Clarify prospect's commitment and desire to engage
- Formally ask for gifts and suggest terms
- Secure detailed pledge agreement
- Celebrate gifts

Connector
- Identify Prospects
- Establish rapport
- Seek common ground
- Secure affinity for mission
- Introduce prospects to Mavens and Closers
- Cultivate gifts
- Conduct Trial Ask
- Infuse Passion
- Celebrate gifts
3. Action

Donor Experience Management System & Customization:

- Automated marketing, custom messaging delivery system
- Document and track donor participation and engagement
- Donor profiles, segmentation and scoring
- Service recovery
- Capture and nurture leads
- Experience monitoring and feedback
- Ability to track networking activities and events
- Goal tracking and program management
- Social media listening and reporting
- Dashboards and ad hoc reporting
Donor Engagement System

Key Activities
- Donor contacts call center for additional information
- Calls not returned
- Provided incorrect information
- Need to repeat their “story”

Pain Points
- Calls not returned
- Provided incorrect information
- Need to repeat their “story”

Internal Processes

Stages of the experience
- Need/Initial Engagement
- Purpose
- Motivation
- The Gift
- Future Potential

For each stage, outline pain points for key activities

Map pain points and how they relate to internal processes

Design/enhance CRM to support processes and activities

Measure improvement over time
Our Value

We understand the nuances of healthcare having worked with some of the largest and most respected organizations in the country.

Our healthcare professionals lead stakeholders to make best use of market information to build and execute sound strategies.

We uncover attitudes and expectations to form consensus around which transformational strategy to pursue.

We then provide recommendations, based on our knowledge of the market segments, as to how to best achieve real business value.

About half of our firm’s clients are in healthcare, mainly large healthcare systems and academic medical centers.
Healthcare Experience

We work with other nationally-recognized Institutions:

• 5 “Honor Roll” institutions
• 5 out of the top 10 cancer programs
• 3 out of the top 4 pediatric hospitals
• 3 out of the top 10 cardiovascular programs

National Benchmarking Studies:

• Patient experience management
• Marketing practices
• Physician relations programs
• International programs

Recognized as one of the top Healthcare Management Consulting firms by Modern Healthcare

Selected Clients

- Barnes-Jewish Hospital
- Boston Children’s Hospital
- Cleveland Clinic
- Cincinnati Children’s Hospital
- Duke Medicine
- Froedtert Health
- Mayo Clinic
- MD Anderson Cancer Center
- Memorial Sloan-Kettering
- Memorial Hermann Healthcare System
- Menninger Clinic
- Texas Children’s Hospital
- The Ohio State University Medical Center
- University of Chicago Medicine
- University of Colorado Health
- University of Michigan Health System
Red Zone Management
The Playbook for today’s troubled business environment...when all businesses find themselves in the Red Zone. The Principles of Red Zone Management clearly spell out the proven management roadmap for making changes during these turbulent times.

Change Management Toolkit
Purchased by more than 200 firms for use in guiding their Change Management projects. Including detailed, proven and tested tools and templates to ensure change success.

Thought Revolution
Demonstrates how to tap into the right brain – the place where intuition and creativity exist – in a simple, easy and dramatic fashion.

Change is the Rule
This book is considered by many to be the most useful and practical explanation of how changes are managed in the modern organization.
Reasons to Choose Us

Collaborative
We ensure your team understands what we do, what we learn, and how to take action

Insight-based
Each healthcare organization is different – particularly your capabilities and information needs – so we make the best use of your existing information, and recommend ways to fill the gaps, to guide decision making

Enabling
We strive to help our clients learn this process so it can be used repeatedly; we don’t use “black-box” processes

Respected
Our work is recognized in publications, awards and presentations by the AMA, SHSMD and Forum for Healthcare Strategists
Endeavor Management, is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. Endeavor serves as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

The firm’s 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor’s deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

In 2012, Gelb Consulting became an Endeavor Management Company. Combined with our Gelb Consulting experience (founded in 1965) we also offer clients unique capabilities that focus their marketing initiatives by fully understanding and shaping the customer experience through proven strategic frameworks to guide marketing strategies, build trusted brands, deliver exceptional customer experiences and launch new products. Our experienced consultants and analysts use advanced marketing research techniques to identify customer needs and spot high potential market opportunities.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships. For more information, visit www.endeavormgmt.com and www.gelbconsulting.com

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