Chartered Institute of Fundraising

SUPPORTER EXPERIENCE

TECHNOLOGY AND TOOLS FOR IMPROVING THE SUPPORTER EXPERIENCE

A best practice guide for charity professionals

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EXECUTIVE SUMMARY

Technology and tools have been called out by professionals in the charity sector as one of the key barriers to improving the supporter experience. This paper will help charity staff to better understand which technology and tools exist, and what they can do to improve the supporter experience.

Although technology and tools can play a key role in improving the supporter experience, they will be ineffective without the right context. Good data architecture and governance is imperative. Expecting tools to run effectively with poor data is like expecting a Ferrari to run effectively on orange juice.

Having investment from leadership and a clear supporter strategy are a must.

Expecting tools to be able to deliver a better supporter experience without a clear strategy or clear leadership is like expecting a Ferrari to run without a driver (or AI, in this day and age!)

And finally, **organisational culture and internal processes need to be joined-up and optimised for the supporter experience.**

Expecting tools to be able to deliver great supporter experiences while teams work and plan in silos is like expecting a Ferrari to run without the parts being assembled.

This paper will help you to explore what a roadworthy Ferrari looks like at your organisation.

By reading this paper, you should gain a working understanding of what a technology stack is and feel clearer on the differences between the following technologies:

- Customer Relationship Management system (CRM)
- Data warehouse; Data lake
- Customer data platform (CDP)
- Email marketing platforms
- Marketing Automation Platforms (MAP) also called Cross-channel campaign management tools (CCCM)
- Real-time interaction management tool (RTIM) which are similar to Customer Journey Orchestration Tools (CJO) and Journey Orchestration Engines (JOE)
- Reporting tools; Business Intelligence tools (BI)
- Listening tools
- Customer support software

INTRODUCTION

Technology can be scary. It can be difficult to keep on top of the latest developments and to understand what you really need. Not only that but navigating through the different acronyms and jargon can leave your head spinning!

We wanted to put together a paper that helps cut through some of the noise and to help you have more meaningful conversations with your tech and IT teams, along with suppliers you might work with.

We hope this will help you understand the benefits of harnessing tools that help you deliver a great supporter experience.

Fundraisers don't need to be experts in tech, but having a working knowledge of the latest trends helps you understand the benefits and pitfalls of 'one-size-fits-all' versus 'best-in-class' tech. It also helps you ask the right questions and stops you being fobbed off by jargon and techy speak.

When tools and tech work in harmony with your fundraising they can enable great supporter experiences and help you raise more money.

At their worst, poorly thought through and badly managed projects can frustrate fundraisers, create "computer says 'no'" moments for supporters and burn through money that leaves you worse off than before.

This guide is split into four parts:

- **Supporter experience fundamentals**
- **Data and supporter experience**
- **The role of technology to deliver great experiences**
- **The role of culture**

We hope you find it useful. We'd love to hear your feedback and comments. Send us a note at supporterexperience@ciof.org.uk

With our thanks for reading,
The CIoF Supporter Experience SIG

SUPPORTER EXPERIENCE FUNDAMENTALS

What is supporter experience?

Supporter experience (SX) is the term used to describe the way a supporter feels and thinks about your organisation; the sum of every interaction; everything you say and do; every time you talk or are quiet; every time you disappoint or delight.

Supporter experience doesn't stop.

The experience is malleable and ever-evolving with every touch point, as well as cumulative over time.

Supporter experience is not just a fundraising tactic or even strategy.

It's a whole organisation mindset shift to see supporters and beneficiaries as partners in the mission.

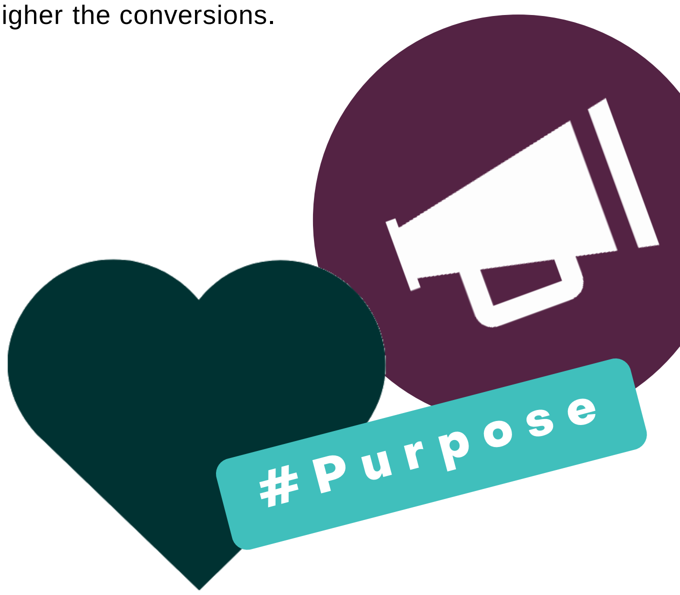
It's a call to shift from transactional, short-term fundraising activities to emotionally-driven, long-term relationships. Making the shift will result in sustainable income in the long-term.

The idea of supporter experience is a long established concept in major donor fundraising. When high-value supporters' experience of giving to a charity are not only met, but exceeded, that supporter is likely to give more and for longer. This is why high-value supporters are most often given an experience which is personal, intimate, warm, and tailored to their preferences. They are treated as **partners in the mission.**

Although the charity sector accepts the importance of a personalised experience for high-value donors, it has struggled to translate that over to supporters who receive mass communications. Although many organisations tailor loyalty communications using some kind of segmentation, rarely is that segmentation grounded in a supporter's explicit preference or engagement behaviours. This is the frontier which we, as a sector, look to conquer in the coming years.

Supporter experience's more mature cousins, customer experience (CX) and user experience (UX) seem to be regarded as much more scientific, quantitative, and influential measures. Most people intuitively understand that when an online checkout process is confusing and arduous, customers will abandon the purchase. We have all been there.

And thanks to Google Analytics and other tools, we can very easily see where in the journey people are dropping off and getting stuck. The data is readily available and conclusive — The less friction there is in an online interaction, the more positive the UX, the higher the conversions.



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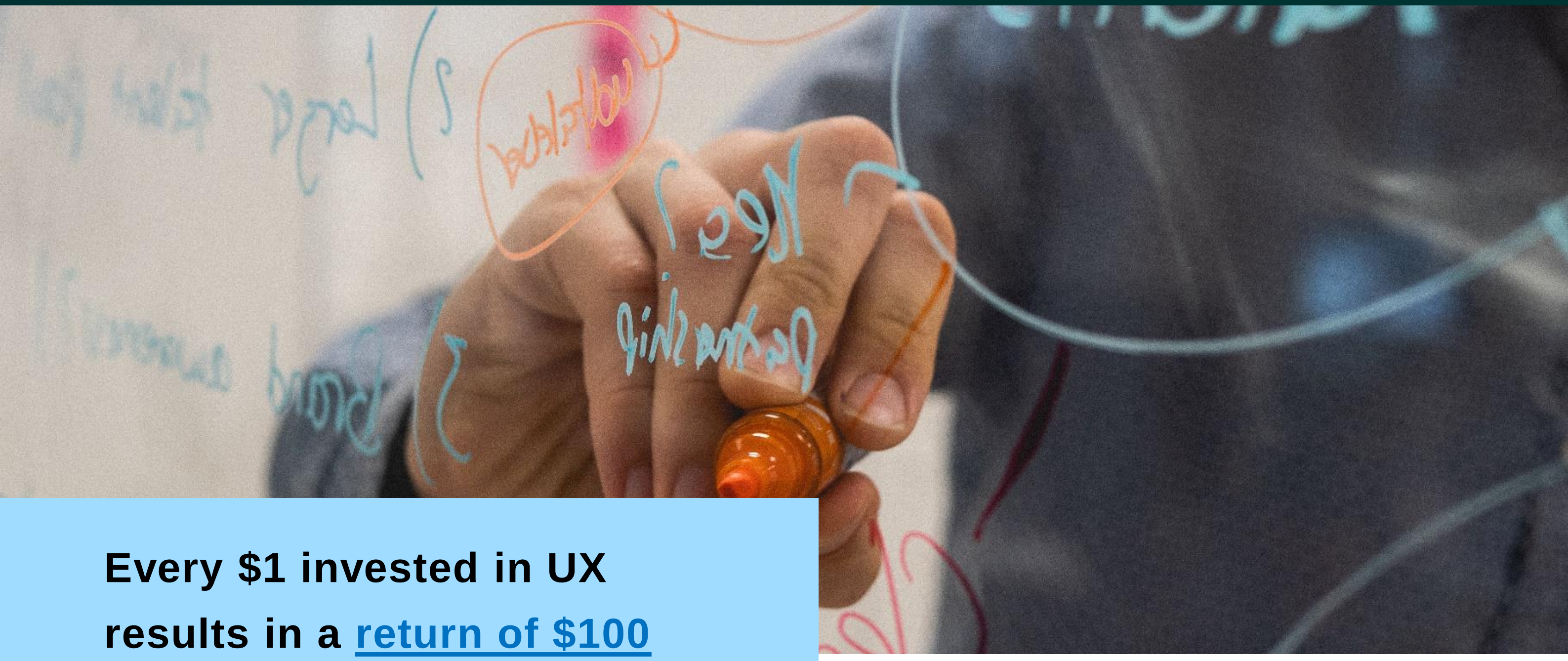

Every $1 invested in UX results in a [return of $100] (ROI = 9,900%).

Businesses also understand the value of an excellent customer experience. They have to, as the benefits are no longer debatable.

- Brands with superior customer experience bring in 5.7 times more revenue than competitors that lag in customer experience
- 84% of companies that work to improve their customer experience report an increase in their revenue
- The top reason customers switch brands is because they feel unappreciated
- Two in five consumers would consider switching to another brand after two bad experiences

With so much riding on positive customer and user experiences, brands aren't leaving anything to chance. If you ask any of the major brands about what their customer experience is like, they will have a range of measures dedicated to reporting on and improving it. There are dashboards with quantitative data and insights from qualitative feedback sessions.

Despite the immaturity of supporter experience as a concept (at least relative to customer experience) one could argue that the experience that supporters have with charities is more important than one that customers have with brands.

After all, what are charities selling if not a positive experience?

Yet in the charity sector over the last ten years, we have struggled to differentiate between supporter experience and relationship fundraising. We haven't changed any of the overarching infrastructure, systems or processes needed in order to really get sight of the full supporter experience, let alone improve it.

In order to genuinely deliver on improving the supporter experience, we must stop thinking of it as a philosophy and start investing in it as the most important insight that charities track and act on.

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What do supporters want?

There are numerous motivations and reasons for giving to charity. As much as we like to think giving is rational, there is a large body of evidence that shows emotions are at the core of giving and all buying decisions.

Whether it is connected to a life experience, an injustice, an emergency that needs urgent support, or something more personal that taps into a person's core beliefs and identity, emotions are why people give.

It therefore follows that our supporter experiences need to be built on understanding the emotional needs of our supporters too. Why have they chosen to support your cause as opposed to another? Why have they chosen your charity specifically? The answer to both of those questions requires insights, but will always point back to emotions.

You need to consistently think about the emotions you want to invoke in your supporters through your communications and interactions.

Your overall experience is the sum of all the emotions your supporter feels when they interact with you.

This can be in-person, online or through other comms methods.

Things that contribute to the supporter experience include:

- **Brand positioning (awareness)**
- **Interaction experiences (acquisition)**
- **Content relevance (retention)**

And data and tech play a key role in being able to deliver on these!

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Supporters also want to have smooth convenient experiences. They may not know this consciously, but behavioural data will show this. Any charity tracking conversions on Google Analytics will tell you that having a frictionless check-out process is key for maximising completions.

Getting the functional aspects of the experience right is the bare minimum we need to deliver.

This means making sure that supporters can interact with your charity in the most intuitive and effortless way possible, no matter the touchpoint. Both proactively and reactively.

To make sure that this is the case, we need solid processes. Because no matter how friendly and helpful your supporter care team are, if the data processes aren't in place to let them see all of a given caller's support information, they aren't going to be much help.

Some examples of functional jobs that your fundraising experiences may need to deliver include:

- **Personalising name and contact information**
- **Recording giving history and sharing info for Gift Aid/tax purposes**
- **Notifying next of kin how much has been raised in-memory (though this has big emotions attached)**
- **Sending details of events**
- **Replying to emails and social media posts within a set time**

Having good data and fit-for-purpose tech can help deliver all of the above!

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Finally, it is important to figure out how you can not only meet but also exceed a supporter's emotional expectations. This means gathering meaningful insights so that you can serve your supporters the content, stories, and asks that will make them feel good about their support - and consequently will increase their engagement. Much of this can be automated and enhanced using tools and technology, but they have to be grounded in the right insights.

So how do you find those insights? Most charities can attest to how hard it is to get a functional supporter segmentation on its legs. There is no one-size-fits-all approach for the sector, as a charity’s mission, supporter demographics, resource, and many other factors will come into play. There is, however, one piece of advice that we think charities would be wise to consider.

Make sure that any segmentation is operationally viable.

What does that mean? It means that you have to know how you are going to group supporters into a segmentation, and how that segmentation is going to improve the content of their communications or journeys.

For example, if you have an attitudinal segmentation of supporters, this may give you rich insights into supporter attitudes or motivations, which is great! But you have to know how you can apply this operationally.

Will you ask people some key questions (also referred to as killer questions or golden questions) to understand which attitudinal segment they belong in?

Will these get asked at every data collection point?

Do you have the processes and capacity to truly customise communications based on which segment they fall into?

If the answer to the above questions are ‘no’ then you have a problem. Segmentations are great, but you have to know how you’re going to use them. Once you know this, you can explore how technology or tools can make your personalisation more seamless, bespoke, efficient, and so on.

So, to conclude, if you asked supporters directly what they want from giving to your charity, they might say ‘nothing’, however the evidence suggests this is not the case. Your experiences need to deliver a range of emotional and functional jobs that:

- **Make the supporter feel good about giving**
- **Show them the difference their support is making (stories are usually the best vehicle for doing this)**
- **Meet and exceed their emotional expectations**
- **Get the basics right – timely, efficient, accurate etc.**

That is why having good data and the right technology is so important.

Finally, where possible, we need to move away from one-size-fits-all experiences that treat donors as a homogeneous group. Instead we need to use tech, data and tools to personalise and customise the experience based on transactional and relational data.

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What are the benefits of investing in supporter experience to my charity?

In an increasingly competitive world where the boundaries between charities and social-purpose organisations continue to blur, delivering a good experience is no longer a nice-to-have. There is only so much frustration or neglect that supporters will tolerate.

As we showed in the first section, the business world knows the importance of delivering a great experience and invests accordingly in doing so. We need to do the same.

It is a given that it is more expensive to find a new supporter than to keep an existing one. Yet, our budgets don't always reflect this.

As a sector, we need to invest more in the data and tech we need to deliver great experiences. Some of the benefits include:

1. **Increased trust, commitment and loyalty, which in turn increases lifetime value and giving (see recent research from the Institute for Sustainable Philanthropy and About Loyalty for more on this)**
2. **Increased positive word-of-mouth, which can attract new supporters**
3. **Improved efficiencies to increase time fundraisers can spend with supporters**
4. **Better staff retention. Delivering great experiences is rewarding, empowering and even fun!**

We know committed supporters are very forgiving and understanding when things aren't as joined up or as smooth as they should be. However, we can't always rely on this goodwill. We need to keep pace with new technology and software that allows us to use data in ways that deliver a great supporter experience.

Supporter experience maturity

Every charity is at a different point of their supporter experience journey. Don't get too downhearted if you think 'this all sounds great, but my charity just doesn't have the capacity or time to do any of this'.

Before we get to that, it is good to recognise where you are on the journey.
As the Chinese proverb states, "A journey of a thousand miles begins with
a single step."

Knowing where you are on your journey and being honest about what you
need to do can help you take that first step to improving.

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Supporter experience maturity model

Take a look at this Supporter Experience Maturity Model that we've adapted from Forrester's Customer Experience Model:

Stage	Stage 1 Unrecognised	Stage 2 Interested	Stage 3 Invested	Stage 4 Committed	Stage 5 Engaged	Stage 6 Embedded
Feeling	"They don't know me"	"It wasn't too bad"		"It is easy to get what I need."		"I recommend them!"
Prioritisation	SX is not a priority	SX is important and recognised by leaders	SX is very important and passion for SX is spreading	SX is critical and leadership actively engaged	SX is a core piece for the charity strategy. Passion for supporters is relevant	SX is in the fabric of the charity and is not spoken separately from strategies and goals
Understanding	Basic understanding of who supports are and what they want	Good understanding of who supporters are and some insight collected	Supporter needs and preferences have been identified and used by parts of the team	Supporter needs and insights are shared across the charity and targeted improvements to improve gaps in journeys are being addressed	Charity has comprehensive , actionable view of customer needs and preferences and uses insights to improve SX	Insights drive change and charity is a leader in loyalty and satisfaction
Integration	No managed SX processes in place	No managed SX process in place	SX programmes are emerging in pockets of the charity	SX is becoming part of the culture and there are SX champions helping to spread good practice	SX programmes are in place and all employees have SX goals and are accountable for improving SX	Employees are continually planning, monitoring and improving SX experiences across all channels and touchpoints
	REPAIR	ELEVATE		OPTIMISE		DIFFERENTIATE

In our experience, the majority of charities are at stage three or lower. We are not aware of any charity that is at stage six, although many have ambitions and plans to get there.

Wherever you are, in the next section we'll begin to explain how to look for tools and tech that can help you to improve your supporter experience.

Data and supporter experience

To be able to deliver a great supporter experience requires you to have the ability to capture, analyse, and use data.

Data is the foundation of a great supporter experience that you can then build on to deliver personalised, relevant and inspiring experiences to supporters.

You can have the best tools and tech in the world, but if you don't have processes for collecting relevant data to provide insight, then they are not going to help you.

Any discussion on data needs to consider GDPR. These regulations transformed the way we all value and understand our personal data when they were introduced in 2018. Supporters in general are much more conscious about sharing (and not sharing) their data. The changes have given supporters ownership of their data, which made everyone more knowledgeable about where and how it's stored.

Many charities will claim they are data-led and make decisions based on the data. However, the reality is that this better reflects their ambitions than their practices.

Charities also tend to be much more careful on the amount and type of data they record and store about supporters. We contend that this is a missed opportunity and holds back many supporter experience efforts.

We know that companies like Google and Facebook make billions in advertising revenue from capturing our interests based on how we use the web.

Yet many charities are uncomfortable making information on who uses their services, website or interact online, available to fundraisers to tailor experiences.

We're not saying charities have to set up their own algorithms. However, we need to be less squeamish.

We should be open to using data for good and to improve experiences.

Too often you hear complaints from supporters about generic comms that fail to recognise motivations or previous reasons for giving. This is often because we're scared to capture and use the data that supporters would expect us to.

If we can't interpret what our supporters are telling us via their behaviour, we will give them a bad experience.

Keeping your data clean

You can spend a lot of time and money storing correct data and analysing it to inform your activities and spend. However, you also need to keep it clean and accurate.

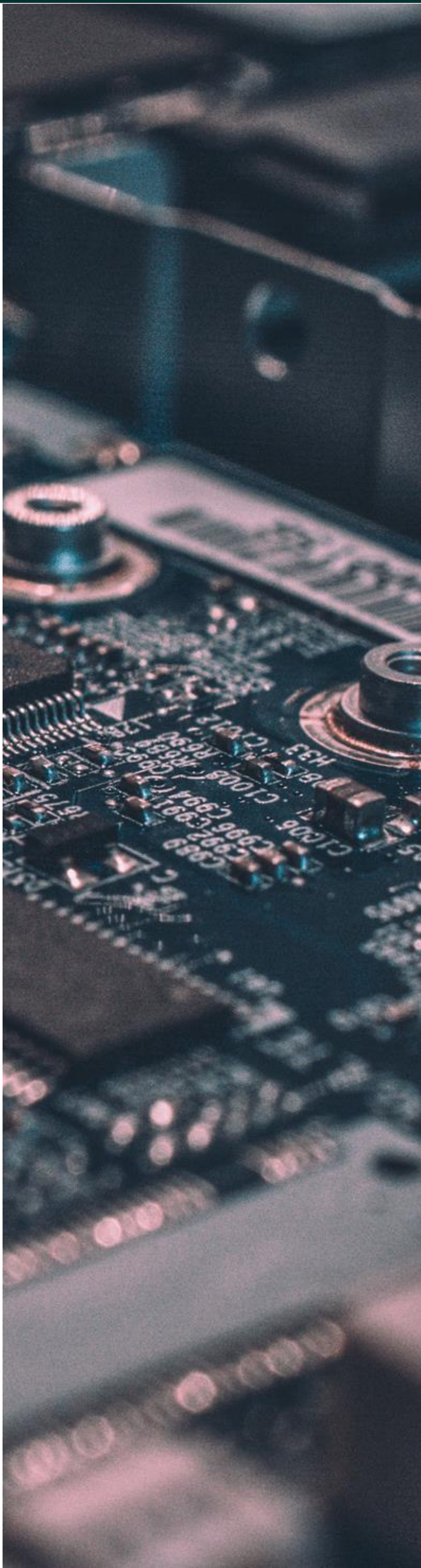
That's why having good data governance and processes is so important to the supporter experience.

You can start by asking yourself some of the following questions:

1. **What data sets are needed and for what reason?**
2. **Where is it going to be stored?**
3. **Set data standards and conventions. For example, making sure everyone uses the same data format can save you from future headaches.**
4. **How should we record preferences and consent?**
5. **Who monitors this and how frequently?**

You should then document this and think about the various touchpoints and experiences people have with your charity. For example, if a supporter returns an appeal donation form to a charity shop does everybody know what needs to happen next? Does everyone understand why collecting that information is important for things that will happen in the future - outside of that one interaction at the shop?

Processes will support the upkeep of your data. They will help you keep your data clean and usable. Don't try to do it by yourself. Involve people from different teams as they will know with much more accuracy what happens in their teams. [Here's a great guide to help you to start developing process maps.]



THE ROLE OF TECHNOLOGY TO DELIVER GREAT EXPERIENCES

Which technologies exist?

CMS, CRM, AI, CCCM, RTIM so many acronyms, so much to process. It can sometimes be so daunting that many switch off when the subject of technology in fundraising comes up. It is something to leave to the IT and data folks.

Feeling overwhelmed is natural but remaining confused can be risky. Often, we see charities looking around for an answer to a problem, which is often inherited from people who have left the charity. Often it is made worse by a lack of documentation and strategy. This leaves us blaming the tech rather than the process. It is then easy to be seduced by technologies peddling themselves as ‘the solution’. Whether that be a big catch-all single CRM solution, a data warehouse, or some more niche technology. But the truth is that there is no one-size-fits-all tech solution.

To create a Which? Style guide to the best technology and tools for the charity sector would be disingenuous.

This is because the size, needs, legacy systems and data for each charity will vary immensely, therefore the appropriate technologies for their individual circumstances will vary.

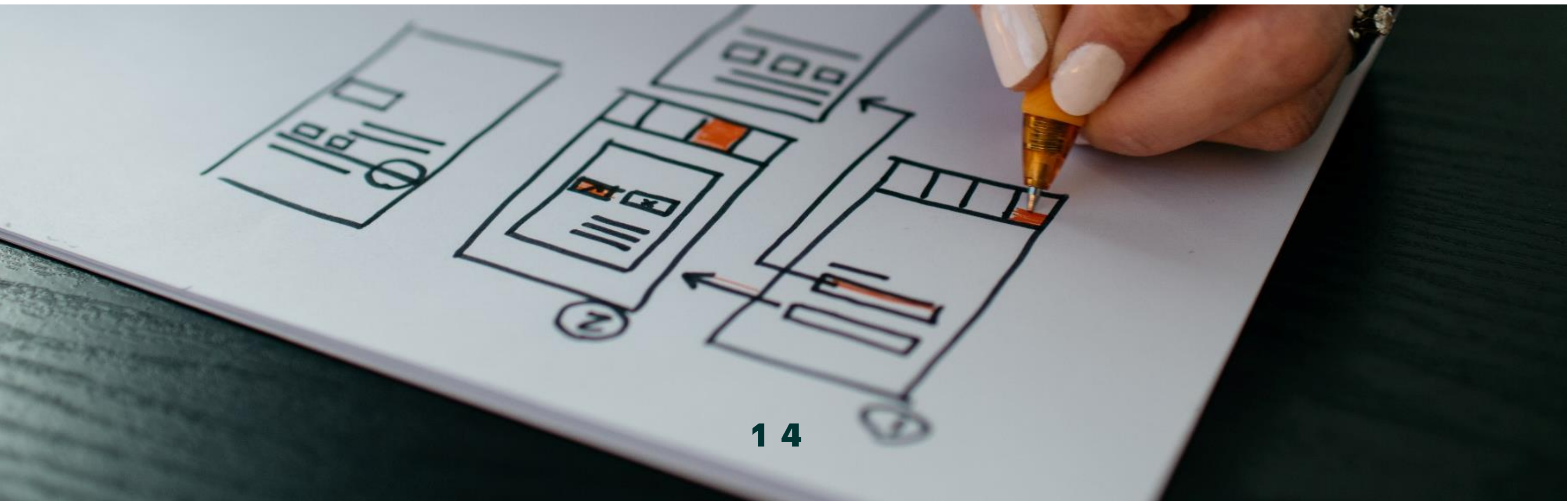
This is because you need technologies that integrate and work together to help you deliver on your charity’s business needs and aims. They have to stack together.

The combination of technologies used in an organisation is referred to as the ‘technology stack’.

Let’s talk through a rudimentary example of a technology stack. Let’s pretend we are setting up a new charity, *Charity X*. The charity will need a website to be able to explain its services, share its stories, and take donations. The website is the charity’s Content Management System (CMS).

Charity X will also need to store information about their supporters and beneficiaries, so they will need a Customer Relationship Management system (CRM).

They will need to contact those supporters and beneficiaries. If the CRM they use has marketing/communication functionality built-in, this may cover their needs. If not, they will need to explore using an email platform in addition to mailing houses, social media platforms, and so on. Nowadays, with the use of APIs (which help systems ‘talk’ to each other) and platforms like Zapier (which help connect different bits of tech together in an automated way) this is much easier than it used to be.



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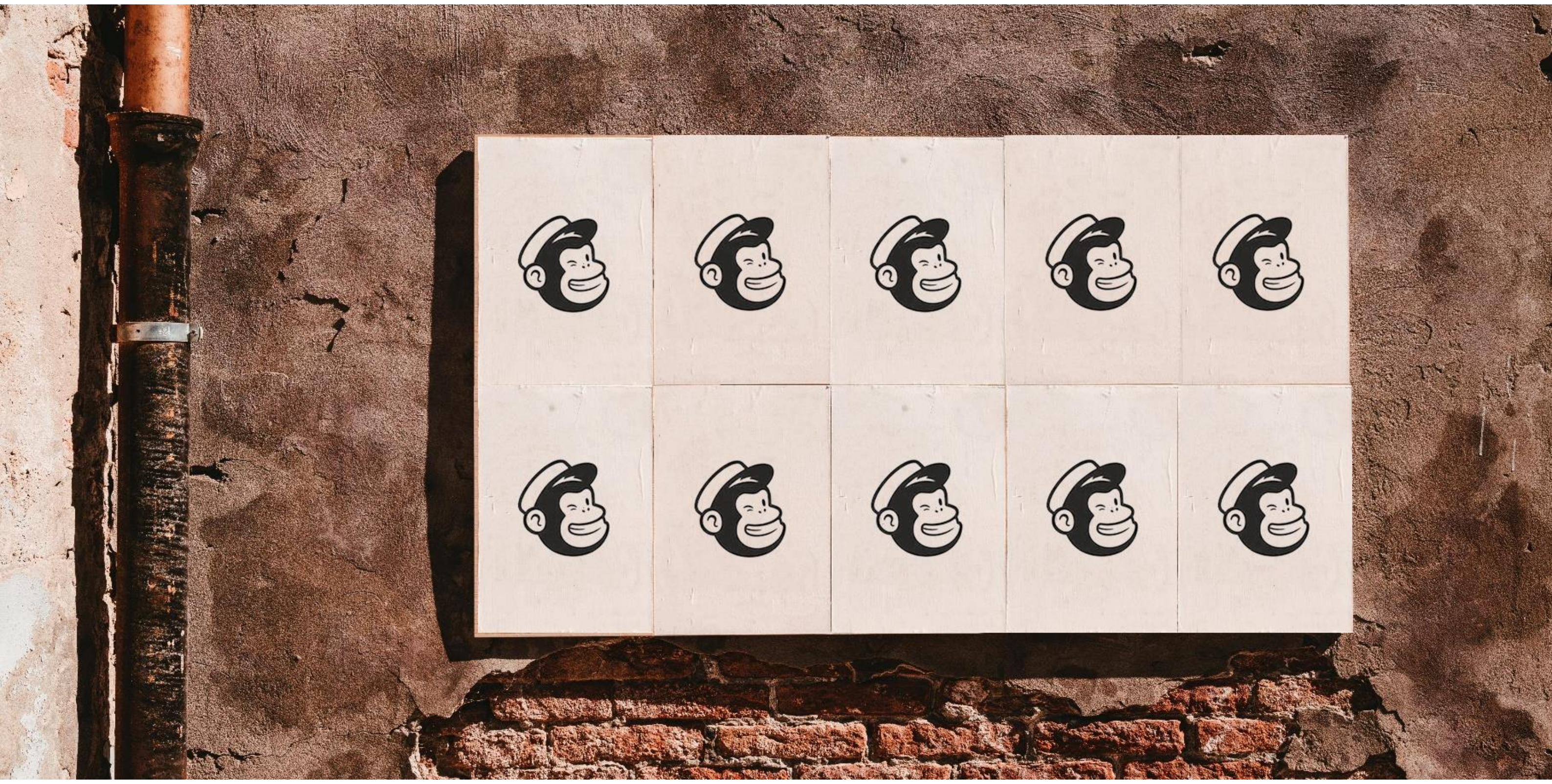
Once the charity has grown, they may not have the capacity to steward each of their supporters and beneficiaries individually. To manage relationships en masse, they will need to create some stewardship processes or journeys such as a donor welcome journey.

This may be something that they can use their email platform for, but some donors may not consent to email, or have the time to read non-urgent emails, so it is wise to create multi-channel experiences. To do so they may need to look at marketing automation platforms.

Once their Martech (marketing technology) stack is up-to-scratch, they will need to understand the patterns in supporter or beneficiary data and behaviour.

Their Martech tools may have some analytics and data visualisation functionality, but this will only cover marketing insights. *Charity X's* CRM might be able to see all 'customer' behaviour and generate insights, but if not, they will require a business intelligence tool.



Once they have a business intelligence tool, they can use insights to inform their marketing, creating a never-ending feedback loop. This improves their communications' efficiency and service / content relevancy. The more relevant a service or piece of content is, the better the experience, the more engagement *Charity X* will see.

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The *Charity X* example is an easy way of imagining how a well-designed technology stack works together to help the charity achieve their aims. But more often than not, charities are not starting from scratch.

For older and larger charities, it is common to see multiple data sources and CRMs e.g. one CRM for donors, one for volunteers, one for beneficiaries, one for campaigners, and so on. Each CRM will have multiple data sources.

For smaller charities it is common to see information being kept in a combination of Microsoft Excel spreadsheets, a rudimentary CRM, and in employees' heads!

Each individual circumstance will affect the best technology approach.

Below is an overview of the differences between the types of technologies which relate to the supporter experience. This can help you to start conversations around how you can use technology to help you deliver your supporter experience strategy.

Tech type	Definition	Examples
Customer Relationship Management system (CRM)	**A CRM system is first and foremost a customer (supporter) data repository. It pulls together data from a range of different communication channels, including a charity's direct marketing responses, telephone, email, live chat, and occasionally, social media.** CRM may be used with past, present or potential supporters and beneficiaries. Information stored in a CRM system covers direct inbound and outbound contact, such as donation and service-related operations. It may also include forecasting, and the analysis of consumer patterns and behaviours, from the perspective of the charity. There are different types of CRM systems, which are typically broken down into the following groups: Operational, Analytical, and Collaborative (also called strategic). For the most part, charities are using primarily Operational CRM structures. The difference in the three can best be explained as follows: • Operational CRMs are built around business processes and technologies that can help improve the efficiency and accuracy of day-today customer-facing operations.This includes sales, marketing, and service automation. • Analytical CRMs provide analysis of customer data and behavioural patterns to improve business decisions. This includes the underlying data warehouse architecture, customer profiling/segmentation systems, reporting, and analysis. • Collaborative CRMs allow you to interact and collaborate with customers. This can include voice technologies, web store-fronts, e-mail, conferencing and face-to-face interactions.	salesforce Microsoft Dynamics RE donorfy beacon thank()

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Tech type	Definition	Examples
Data warehouse; Data lake	**A data warehouse brings all of your data from different systems and sources into one place, and allows you to use other software (CDPs or Business Intelligence software) to visualise and analyse that data.** Data warehouses can combine data from CRMs, marketing automation platforms, external supplier data files, and any other data source. To qualify for inclusion in the Data Warehouse category, a product must: ● Contain data from several or all data sources ● Integrate data prior to going into the data warehouse through an extract, transform and load (ETL) process ● Integrate with third-party reporting and business intelligence tools ● Serve as an archive for historical data	snowflake **Microsoft Azure Synapse** SAP talend
Customer data platform (CDP)	**CDPs are software that create a single view of the supporter (also referred to as the golden record). CDPs aggregate and organise customer data across a variety of touchpoints and is the single source of truth used by other software, systems, and marketing efforts.** Both CRMs and CDPs collect customer data, but a CRM only collects a supporter's intentional interactions, whereas CDPs can amalgamate data from multiple sources including real-time activity on your website or interactions on social media. Charities don't seem to be using this kind of functionality yet - partially due to SX immaturity, and partially out of risk-aversion. Business Intelligence, Marketing Automation, and RTIM tools (to name a few) traditionally use the single supporter view from a CDP to achieve their purposes.	TEALIUM twilio Segment
Email platforms	**Email platforms started as places where businesses could design and format beautiful looking emails. They quickly began to incorporate detailed email reporting and analytics as well as scheduling functionality. In recent years, many email platforms have started to expand to become customer journey tools.** This means that many have started to use marketing automation technology which requires a more sophisticated use of supporter data. In rare instances, email platforms have expanded even further to try to become marketing automation solutions (eg. dotmailer's rebrand to dotdigital when they grew towards being omnichannel).	**MailChimp** adestra

THE ROLE OF TECHNOLOGY TO DELIVER GREAT EXPERIENCES

Tech type	Definition	Examples
Marketing Automation Platforms (MAP); Cross-channel campaign management (CCCM)	**Marketing automation tools provide customer data management, analytics, segmentation, and workflow tools for designing, executing, and measuring online and offline marketing campaigns. This is the scheduling of linear journeys such as email welcome journeys or event fundraising stewardship journeys.** Though primarily associated with outbound channels like email and mobile messaging, marketing automation tools can also manage personalisation for inbound channels like mobile app, e-commerce, and web. Some tools further support print (direct mail) campaigns and make campaign information available to human-assisted channels for presentation to customers.	**Apteco Peoplestage** salesforce marketing cloud **Adobe Campaign** HubSpot dotdigital
Real-time interaction management tool (RTIM); Customer Journey Orchestration Tools (CJO); Journey Orchestration Engine (JOE)	**RTIM and CJO / JOE deliver bespoke 'journeys of one'. This means delivering contextually relevant experiences, value, and utility at the appropriate moment in the customer lifecycle via preferred customer touchpoints. They use real-time data at the individual customer level to analyse current behaviour (discovery) and predict and adjust future behaviour in the moment (decisioning).** These tools utilise machine learning and/or AI to achieve these bespoke experiences. They provide an integrated, actionable, and real-time view of the customer across marketing, product, and customer service journeys. For example, Spotify personalise ads based on a variety of real-time factors to make them as contextually relevant as possible. Listeners will only hear ads for wellington boots when it is raining where they are. CJO differ to RTIM in that they use small "events" that happen over time to help visualise the key moments where supporters make a decision - whether that's to act, leave or do nothing. It also helps to find those moments of joy and moments of friction in one or more journeys from the customer's perspective. RTIM implementations often grow out of customer relationship management (CRM) environments and involve custom integrations with applications for human-assisted channels. To the authors' knowledge, the charity sector does not currently utilise CJO nor RTIM as of this paper's publication in 2022.	PEGA **Kitewheel** THUNDER HEAD **Adobe Journey Orchestration**

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Tech type	Definition	Examples
Reporting tools; Business Intelligence tools	**Data visualisation tools help to make your data accessible and understandable across your organisation. You can have different levels of reporting depending on the needs of the user. The tools can help identify distinct behaviours, marketing segmentations, and provide campaign analysis.** Ideally, these tools will sync automatically with your CRM and provide real-time insight, dashboards and information to help you manage fundraising performance. Although these tools are not designed to collate the single supporter view, many charities choose to use them for this function.	**Tableau** **PowerBI** SAS Viya **Apteco FastStats**
Online listening	**Listening tools can use a variety of approaches, but the most common are:** • **Online listening: scraping all of the uses of brand handles, hashtags, and phrases from social media, blogs, and other public forums to understand how the public is interacting with a brand, its content, or it's cause** • **Feedback aggregation: pooling together all of the feedback coming through supporter care emails, feedback surveys, and other feedback loops** The feedback can be used to look at sentiment analysis, to identify supporter "pain points" and to see how your brand is talked about when 'you're not in the room'.	PULSAR **Brandwatch** mention
Customer support software	**These tools are geared at optimising the support given by supporter care.** Functionalities can include opening tickets for any supporter issues, tracking trends across conversations with supporters, automating some workflows for resolving issues and collecting supporter feedback. In the private sector, these tools can also empower staff to go one step further and facilitate new sales, upgrades or cross-sells.	zendesk **Freshdesk** Gladly

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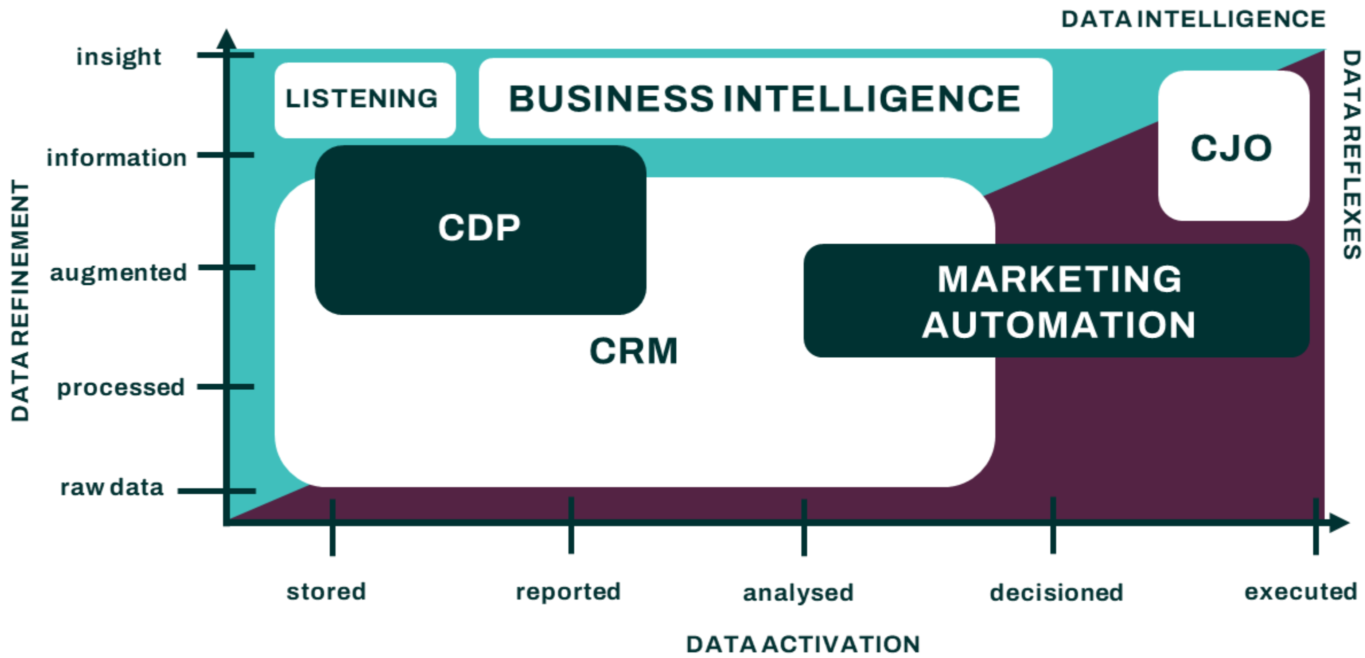
If you are struggling to understand the boundaries between some of these technologies, you're not alone. That's because many of them overlap in their functionalities. Depending on the original design of a tool and how it developed over time, some tools will tick the boxes of several of the above categorisations.

Here is an attempt at mapping how the various systems relate to one another:



Inspired by Scott Brinker, VP Platform Ecosystem at HubSpot and Editor at chiefmartec.com

And these are just the tools that are most relevant for supporter experience. For a full view of known MarTech tools on the market you can check out a [Marketing Technology visual landscape](#)for 2022, by [chiefmartec.com.](#)

A logical leap will lead many to assume that the best solution is to have one mega-CRM that can do everything. Some CRM solutions have indeed acquired technologies rapidly and made a concerted effort to integrate and overtake as many varied functions as possible into one big ecosystem.

The benefit of having an all-singing, all-dancing CRM ecosystem is that data is much more joined-up. This means that operational processes, marketing functionality and insights and analytics are easily accessible. It also means that if a charity is not ready for some of the more advanced functionalities, they don't have to use them, but they leave the door open to the possibility of using them in the future.

THE ROLE OF TECHNOLOGY TO DELIVER GREAT EXPERIENCES

The downsides of this approach are that firstly, many such CRMs will charge for access to different packages or functions within their ecosystem. These costs can quite quickly add up and may not be as cost-effective as having disparate but integrated systems. Another downside is that it is an enormous project to have to shoehorn many types of data into one infrastructure. This can easily be an extremely resource-heavy piece of work and, if done hastily, can seriously compromise data quality.

For example, if your charity works with beneficiaries where their personal data is extremely sensitive, it may be very difficult to create a data infrastructure which suits both beneficiaries and supporters and could require lots of bespoke architecture. This means lots of time and money.

Finally, for infrequent users and people who aren't confident with tech, 'an all-singing, all-dancing CRM' can be daunting and off-putting. Without on-going training and support people can become scared to use the tech and you end up with people keeping their own spreadsheets and data in places and ways that make it easy for them. This can be frustrating but is human nature!

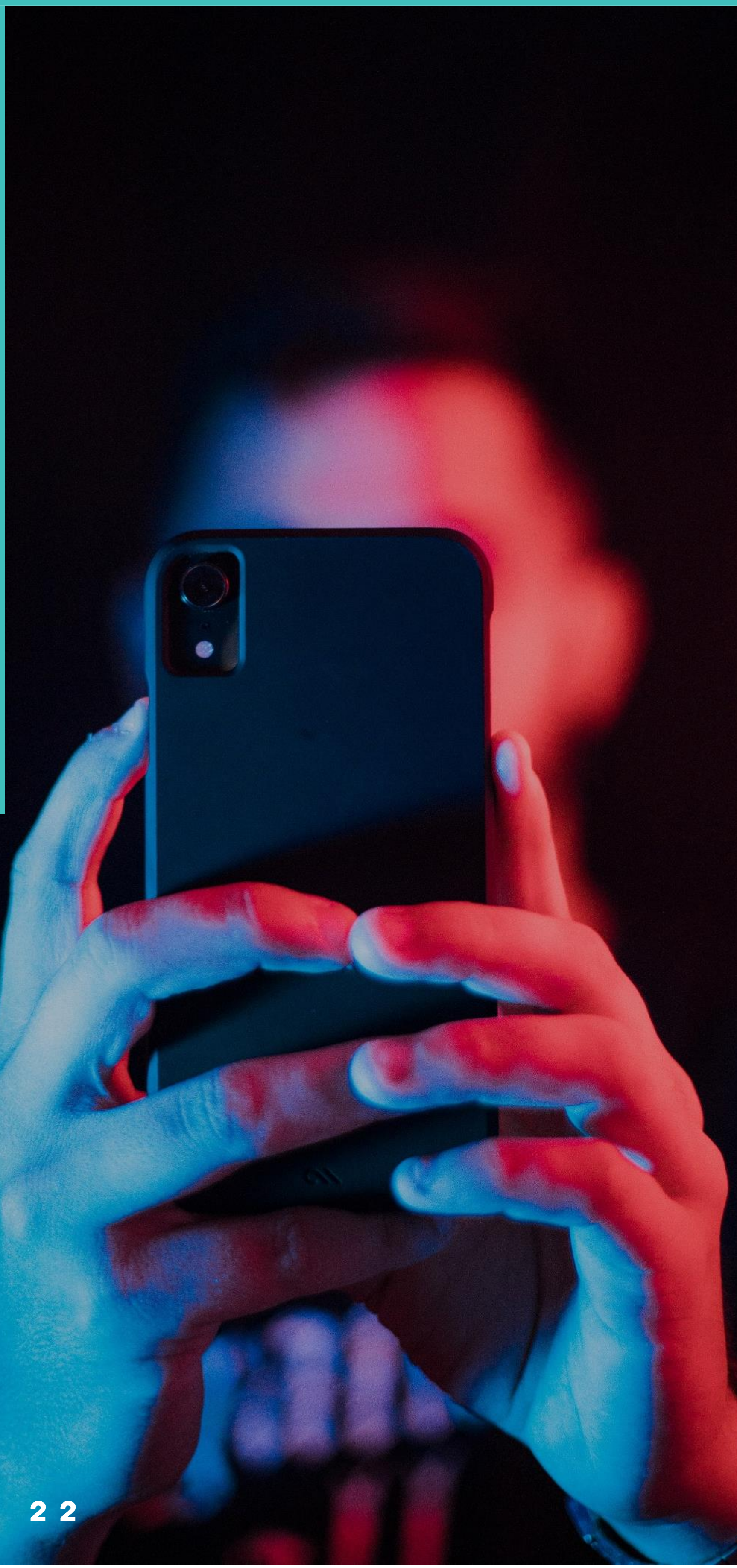
Rather than force every legacy piece of information into one CRM a Lego brick approach may be of benefit. That is to say, review all data sources and repositories, clean, standardise, and ensure each is fit-for-purpose and cost-effective, and finally integrate the varying strands of information in a data warehouse

THE ROLE OF TECHNOLOGY TO DELIVER GREAT EXPERIENCES

CHECKLIST

Whatever solution and tech you decide to go with it is crucial that:

1. processes are documented
2. users are trained (using a variety of methods to meet different learning styles)
3. there is timely and helpful support in place
4. people are clear on how the tech can make their job easier and help them achieve their goals



THE ROLE OF TECHNOLOGY TO DELIVER GREAT EXPERIENCES

How to choose the right technology for your needs

The most important thing is to have clarity on what your organisation is trying to achieve.

Platforms should aid an organisation's objectives, but they shouldn't be the objective.

For example, you shouldn't have a new email platform because you want to send emails. You should look for a solution to communicate with your audiences in a way that resonates with them. What is the right channel, timing, and voice? How will you segment? How will you know that you are succeeding?

If you know the answers to those questions and have identified that you need an email platform – then you know where to go.

Secondly, it is important that the organisation is communicating effectively internally and considering technology solutions holistically.

When technology decisions are made in isolation, they may provide the solution to a niche problem but create more issues in the long-term.

Consider this example: a charity needs a new website. The IT person, who used to be a developer, is asked to lead the project so he decides on an amazing CMS platform that will deliver the best user experience.

The solution is open source (aka it's 'free'). But it requires some low-level coding. This seems pretty simple to them, but the organisation simply doesn't have the skills in-house for a full-time member of staff to be responsible for web-coding, nor do they have the budget to outsource it. The IT person is suddenly stretched too thin and moves on to another role.

Or another real-life example: the volunteering team at a charity need a better way to store volunteer data. They also want volunteers to have a portal that they can log into to access training and shift information online. They go to tender and pick a new bespoke CRM system which best suits their needs.

A few years later, the charity realises that they need to join up volunteer data with other supporter information, but the volunteer CRM is so bespoke that it is near impossible to integrate. Now the charity is really struggling to understand which volunteers are donors and campaigners, and vice versa. Not only that, but the bespoke volunteer CRM is eye-wateringly expensive and out of step with the market.

This has happened because the people who chose this platform were experts in volunteering but didn't have any experience in CRM tools.

THE ROLE OF TECHNOLOGY TO DELIVER GREAT EXPERIENCES

To avoid this, try taking the 'everyone and their dog' approach.

Get every affected team in the room for a discovery workshop. Make sure that there is input from both technical and non-technical staff. You should have representation from supporter care or whoever will be fielding feedback from the audience in question. Think about which less obvious teams might have a stake in better understanding the prospective changes. Make sure that everyone's requirements are listened to and considered within the framework of the project objectives.

Thirdly, it is important to think about what the charity needs now, but also where the charity wants to be in three years' time.

Make sure that you are future-proofing your tech stack.

Take the opportunity to evaluate what the organisation currently does and what it wants to achieve in the future.

Consider the expected growth, strategic priorities, and expected changes in the market. Spending some time understanding where the growth lies, and what the overall plan for the short period is very important. You don't need a 50-page strategy or a crystal ball, but an indication of where the organisation sees the biggest growth.

An organisation planning to grow their trust and foundations income has very different needs to one that plans on investing in their community offering.

Technology is not going to be a silver bullet.

Could your objectives be achieved by better processes or stronger internal communication?

Many organisations have been using the same processes for years and no one knows why. Someone might have asked for that flag on their contacts but no one really knows what it does anymore. Rather than bin the whole CRM, your objectives might be achieved by undergoing a data and processes audit – something which would need to take place ahead of any data migration project anyway.

Finally, if you do decide to take on new technology, make sure that you invest properly in the project management of any new tech solution.

New technology and tools have a habit of becoming a bit of a Pandora's box. Charities underestimate the work required and end up having to start anew or drastically overspend because something wasn't right. Don't rush it. Just because something is easy or cheap to deploy, it doesn't mean it's the right solution.

THE ROLE OF CULTURE AND LEADERSHIP

Leadership

Organisational culture is incredibly important when it comes to implementing a successful supporter experience strategy. Without the right culture and the support of leadership, any new technology or tools will not have the desired impact.

Technology and tools can only be effective if senior leaders understand and support the overarching objectives that the tools are trying to achieve.

Even with the tools and tech in place to deliver practical improvements you need leadership to see supporter experience as an organisational priority. Otherwise, alternative projects may take priority and be considered more valuable.

A challenge that many charities report coming up against is the failure of organisations to translate theoretical support for improving the supporter experience to actual investment.

The challenge is often that those aspects of supporter experience which result in immediate financial gains, such as improving the online donation experience or spending money on feel-good acquisition campaigns will get support.

But investing in increased content relevancy, embedding insightful feedback loops, and having clear supporter experience measures are things that may not generate in-year income, and are therefore often left on the chopping block.

Any new technology or tools which can deliver automated journeys, generate deep audience insights, or create beautiful dashboards will flounder unless there is the strategic direction in place to make the most of them, and clarity around the problem that they help to solve.

Leaders who are knowledgeable about the importance of the supporter experience demonstrate the following behaviours:

1. Rewarding behaviours that improve supporter experience
2. Making space and time for staff to consider the supporter in their day-to-day work
3. Measuring supporter experience and holding the organisation to account

and crucially…

4. Thinking about supporter experience as an income strategy and investing in it as such

THE ROLE OF CULTURE AND LEADERSHIP

Process and ownership

Each and every person plays a vital role in the organisation's mission, and the same can be said for reaching your supporter experience goals. Supporter experience must be considered at every stage of the customer lifecycle, from awareness and engagement, through to ongoing retention and advocacy.

More and more, charities are recognising that supporters cannot and should not be pigeon-holed as 'just' donors. fundraisers, volunteers or campaigners. They are multi-faceted and their support for any cause can be too.

Only in treating supporters as long-term partners in the mission can we really hope to build life-long relationships and deeper engagement.

But as much as we can talk about breaking down silos, internal communication isn't enough. The technological and structural element needs to be thought through as well.

- **Does your charity still think of different types of supporters as 'owned' by one specific team? How might supporter data reflect that?**
- **Do teams believe they "own" data, or think it's just the data team's job to own it?**
- **How are communications planned and are they based on what supporters want to hear or what the charity wants to say?**
- **Do you have the insights needed to meaningfully segment content based on relevancy?**
- **Is it down to individual teams to decide on how and when to make asks or 'cross-sell' or is this led by holistic supporter insights? Do all teams join the dots between insights and business planning?**

In order to truly become supporter-centric, we must think about the role that the organisational structure and processes play in the ongoing supporter experience. Only then can we understand how technology can enhance or uplift best practice, rather than cementing old siloed ways of working.

IN SUMMARY

In this paper, we've looked at how technology can help you deliver better experiences for your supporters.

However, before diving straight into the tech you need to understand where you currently are in terms of SX maturity. This will help you put in place an achievable strategy that will help you improve SX in a structured way.

Be honest with you and your organisation. Ask yourself:

- Do you have the internal processes, leadership, and culture to facilitate better SX?
- Scope how you want to measure SX – what gets measured gets done!
- Understand the technology you have – is it fit for purpose?
- If you do decide to bring in new technology, what do you actually need?

Only then should you take the final leap and procure the tech you need to deliver a great experience.

Einstein famously said if he had an hour to solve a problem, then he'd spend 55 minutes defining the problem and alternatives and five minutes solving it.

You should take a similar approach to deciding on the tools and tech you need to deliver a great supporter experience.

1. Identify your objectives and business needs first
2. Evaluate what will help you deliver your objectives
3. Look at all the options – do your homework
4. Involve stakeholders in the scoping process
5. Consider how new technology will interact with the existing stack
6. Explore how the tech will work cross-functionally
7. Make sure your transition / migration project is well resourced

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