

STRATEGIES FOR YOUR AGENCY

TO SURVIVE & THRIVE

The Advancement Group's Marketing Team:
Brittany Stokes & Ashley McKinney

the
Advancement
»» group

PRESENTATION OUTLINE

Key topics for survival

- Part 1.** How to Lead & Influence
- Part 2.** How to Communicate with Donors
- Part 3.** What Stories to Tell and How to Share Them
- Part 4.** Survive and Thrive with Innovation
- Part 5.** Your Endowment to the Rescue



Brittany Stokes

Vice President of Marketing

Brittany Stokes put her communications degree to work at a large advertising agency serving clients like Under Armour, Inc and other outdoor brands for several years before diving into the philanthropic arena. Brittany is passionate about helping organizations share their mission and grow donor affinity. She is an avid speaker on the topic of corporate branding and nonprofit innovation. With a unrelenting heart to care for, value, and love orphans and vulnerable children, Brittany co-founded Project Orphans non-profit organization in 2011.



Ashley McKinney

Creative Director & Storyteller

Ashley is a seasoned storytelling guru with over 12 years experience as a graphic designer, marketing specialist, and photographer. She began a freelance photography business in 2015 specializing in visual storytelling for brands in the Commercial Industry and works with major industry influencers. She's an avid volunteer and loves to utilize storytelling through different social channels to spread cause and attract new donors for non-profit organizations.



part 1

HOW TO LEAD & INFLUENCE
EFFECTIVELY



HOW TO LEAD

*"Any kind of crisis can be good.
It wakes you up."* RYAN RENOLDS

The coronavirus (COVID-19) has caused businesses, nonprofit agencies, and people around the world to wake up! For the first time in a long time, we are having to behave differently, try new technologies, and work innovatively to communicate our message.

Right now, there is a desire from donors, volunteers, staff, and those served by organizations to be led by words and efforts they can trust!

Trust during times of uncertainty allows you to lead and have influence! People will follow those they trust. Donors will give to charities they feel are doing the right thing with the donations they receive. And your staff will remain dedicated to your mission as long as you care about their safety and concerns.

Before you can lead your donors and your team - you must be a leader who is not anxious and does not make decisions out of fear!

ACCORDING TO A HARVARD BUSINESS REVIEW ARTICLE WRITTEN BY JACK ZENGER, TO BE AN EFFECTIVE LEADER YOU NEED YOUR TEAM'S TRUST.

Words of Inspiration



ARGUABLY, THE HIGHEST **PERFORMING
SQUADS IN OUR FORMATION ARE THOSE THAT
ARE BUILDING TRUST. TRUST IN THEIR
LEADERS AND **TRUST** IN ONE ANOTHER."**

- Daniel A. Dailey, Sergeant Major of the Army

Did you know?

70%

of employees are more aligned with their company's purpose compared to employees in low-trust environments.

STRATEGIES TO DEVELOP TRUST

AMONG YOUR STAFF & YOUR DONORS/VOLUNTEERS

POSITIVE RELATIONSHIPS

- Stay in touch on the issues and concerns of others. This means picking up the phone and calling donors, employees, and volunteers! Check in and listen to what they are saying.
- Be transparent with your team and donors - as much possible.

BE A TEAM PLAYER & LISTEN

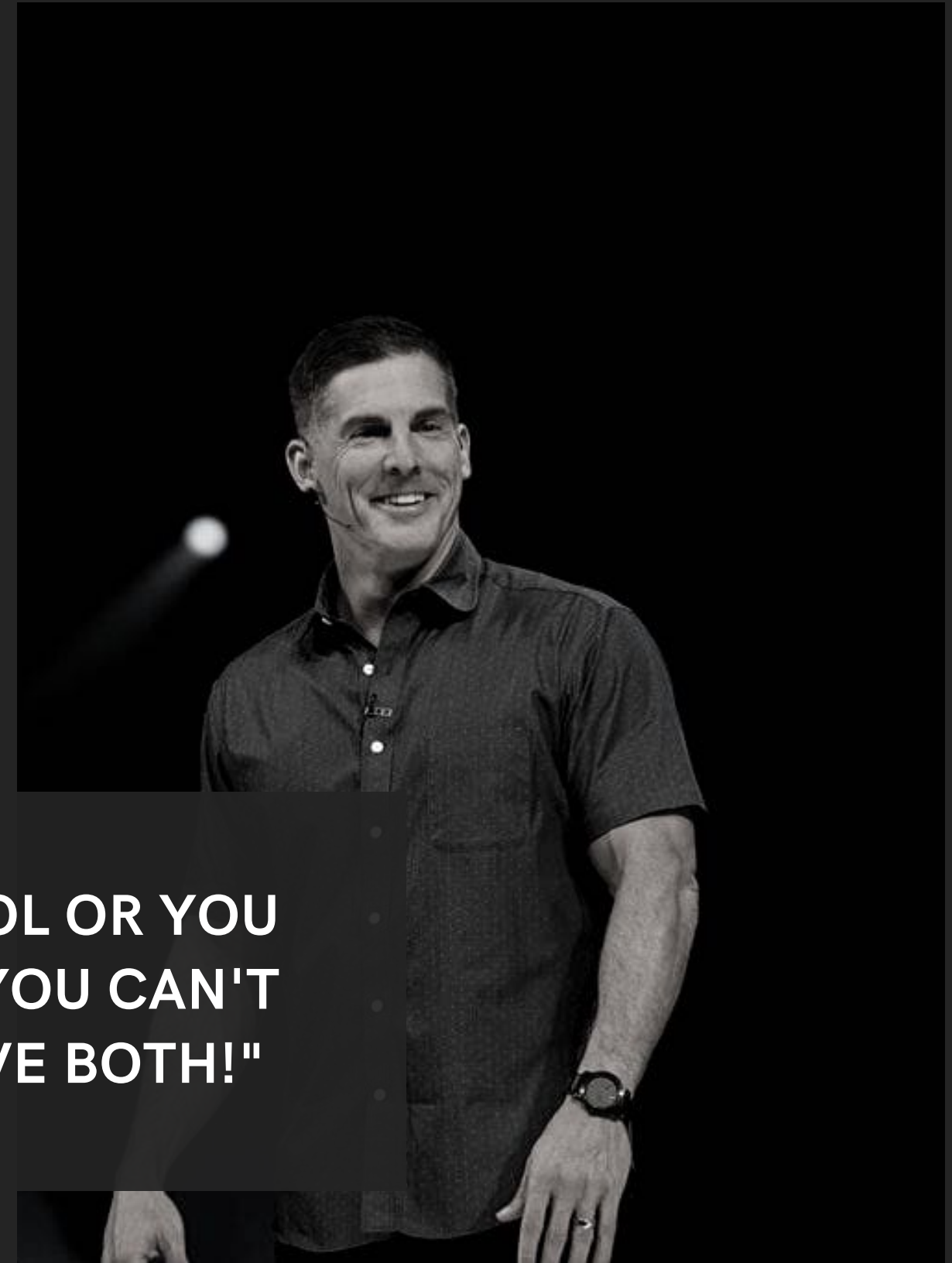
- Give your employees, volunteers and donors a feeling of camaraderie. Let them know they are appreciated for walking alongside your organization during this battle.
- Seek after opinions and ideas. Everyone can help the organization survive!
- Be flexible with your team - we are all going through uncertain times with new demands.

CONSISTENCY & CLEAR VISION

- Be sure you are being a role model within your organization and that your organization is being a role model to your community.
- Set the tone of your organization. Be clear on how your agency is going to thrive during this time.
- Follow through on commitments to donors, staff, volunteers and those you serve through your mission!

Craig Groeschel

*Senior Pastor of Life Church & Award
Winning Author*



**"YOU CAN HAVE CONTROL OR YOU
CAN HAVE GROWTH. BUT YOU CAN'T
HAVE BOTH!"**

FURTHER READING & LEARNING

4 Ways to Engage Major Donors During the COVID-19 Crisis

Published by the Chronicle of Philanthropy

[Read Here](#)

How to Inspire Your Team

Published by the Craig Groeschel Leadership Podcast

[Watch Here](#)

10 Steps to Effective Coronavirus Crisis Leadership

Published by Winnie Hart, Entrepreneurs' Organization

[Read Here](#)

Fundraising in a time of crisis: could this be fundraising's finest hour?

Written by SOFII founder: Ken Burnett

[Read Here](#)



part 2

HOW TO COMMUNICATE
TO DONORS

Donors want to hear from you.
But what you say now will
affect the future!



Your donors have been there for you. They have helped you grow to where you are today. Now, many of your donors are hurting...

Right now, you have a chance to deepen relationships, show empathy, and serve your donors!

We promise, if you focus on a long-term strategy, your donors will show up stronger than before.

Think long-term



many
thanks

Small Actions & Honesty

Show your donors that you care. Now is a great time to grab your pen and paper and show your appreciation through handwritten letters.

Prioritize your immediate needs and remain honest. Share how the coronavirus is impacting your work. If you need a little extra care and support, don't be afraid to ask.



Technology & Mail

Everyone is glued to their phone and computer. Donors are stuck at home and want to hear from you. So, don't be camera shy. Get on Facebook Live or Instagram and share how you are meeting the needs of those you serve, what is happening within your organization, and take questions!

Also, people are reading their mail. Donors are enjoying their walk to the mailbox, so make sure they hear from you!



Talk to All Donor Levels

It's important to stay connected to your donors and show them how your mission is at work during this crisis. Create a strategy to touch your major, monthly and other donors at least once per month! This is critical to your success.

Ensure that your communication is carefully written and does not appear to be self-serving. Think of everyone (*i.e. donor, your staff, and those impacted by your mission*).



Address Upcoming Events

If you have had to cancel a fundraising event, it's important to stay positive, still ask for support and highlight any urgent needs.

Let your attendees and event sponsors know there are plans to reschedule.

Words of Inspiration

“

**If you need to raise funds from donors,
you need to study them, respect them, and
build everything you do around them.”**

- Jeff Brooks



WHAT STORIES TO TELL
AND HOW TO SHARE THEM



YOUR
STORIES
MATTER
BECAUSE
THEY ARE
UNIQUE TO
YOU.

AND YOU
MATTER TO
YOUR
DONORS.



WHY STORYTELLING?

"Storytelling is about connecting to other people and helping people to see what you see."

MICHAEL MARGOLIS, CEO, FOUNDER, AND CHIEF STORYTELLER OF STORIED

Storytelling is an extremely powerful form of drawing out feelings and putting them into action. Sharing meaningful stories with your audience is what will ultimately maximize your organization's visibility, impact, and fundraising. It should be treated as a compass for your marketing strategy.

Your donors and constituents are expecting transparency, authenticity, and personality. They want to know that their gift has or will make an impact and HOW. Heartfelt stories can communicate this idea in compelling ways that create opportunities that influence, educate, and inspire.

Stories are

22

TIMES MORE
MEMORABLE

than facts about your
organization.

Source: Quantified Communications

56%

of donors say compelling
storytelling is what *motivated*
them to take action in the first
place.

Source: Tech for Good

Words of Inspiration

Always speak
the language of

HOPE

YOU ARE BRINGING **GOOD NEWS** IN THE MIDST OF HARDSHIP

KEYS TO GREAT STORYTELLING

01 KNOW YOUR GOAL

Make sure the storyline ties into the overall marketing and fundraising goal of your nonprofit. Know what your call to action is prior to crafting the content.

02 BE TRUE TO YOUR IDENTITY

Be true to the distinctive value you can/do bring to your clients. Avoid all gadget tools that are not true to the DNA of the organization.

03 HAVE A CLEAR CENTRAL MESSAGE

When the message and story are simple, your audience can spread the word to their network of friends, expanding your nonprofit's reach even further.

04 SHOW PASSION FOR YOUR MISSION

Don't tell a story for the sake of telling a story. You must showcase the passion for what your organization does to make an impact. Always remember that your agency IS THE SOLUTION to a problem.


Audiences are yearning for **genuine**
interactions. We must connect in
authentic and **thoughtful** ways.

What stories move

YOU?

If the story doesn't affect **YOU** on an emotional level, you can't expect the audience to be affected either.

TEAM HUDDLE



Incorporate storytelling in your weekly meetings

Make storytelling a consistent part of your weekly internal team meetings. Find stories that move you and are worthy to share!

- What is your team personally experiencing?
- Are there any interactions with staff, volunteers, donors, or the people you serve that are relevant to the current environment and align with your mission goals?
- What stories are coming out of your current initiatives?

The good works your doing impact your team as much as they impact the people you're helping. Your agency's team has unique perspectives, gifts, and talents. Involving them can enhance your mission by giving donors a 360 view of your organization, bring transparency, and show the true character of your agency.

*Share stories.
Inspire ideas.*

We're in this together



When there is
UNITY
there is always
Victory

- Publilius Syrus

TYPES OF STORIES TO SHARE

01 *Current Wins*

Share the success of your current initiatives. What did the donated dollars do?

02 *Current Needs*

It is your duty to put out the truth as it is, so don't hesitate emphasizing that more work needs to be done. Just be clear on the current problem, and the solution you are providing.

03 *Donor & Volunteer highlights*

Donors and volunteers play a crucial role in the success of your mission. It's great to honor them for their contributions, and highlight WHY they've chosen to be part of your organization.

04 *First-hand accounts*

Let the people you're serving show how your organization helped them improve their lives. When your audience is able to place a face to the mission and identify them with the cause, they're more likely to help!

HOW TO SHARE STORIES

The *tools* you use need to fit your *target audience*.



Pick up the phone to hear and share stories with your donors. Be intentional, ask them how they're doing and share successes and wins during this time.



Now more than ever, people are home reading their mail. Utilize handwritten notes, newsletters, and your annual fund to share stories.



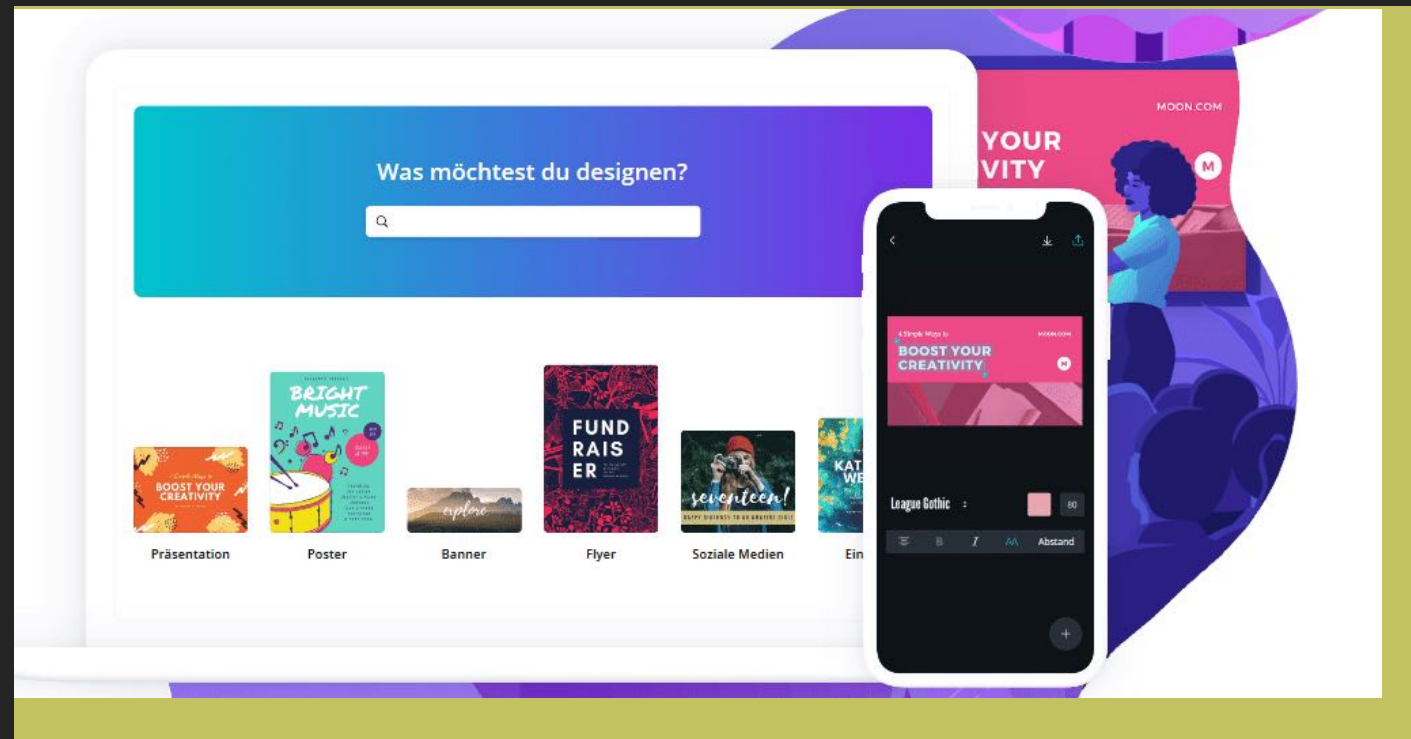
Social media prioritizes stories, provides instant feedback, is shareable, dynamic, and easy to consume.



Visuals

are the most effective communication vehicles for
evoking emotion and getting people to **take action.**

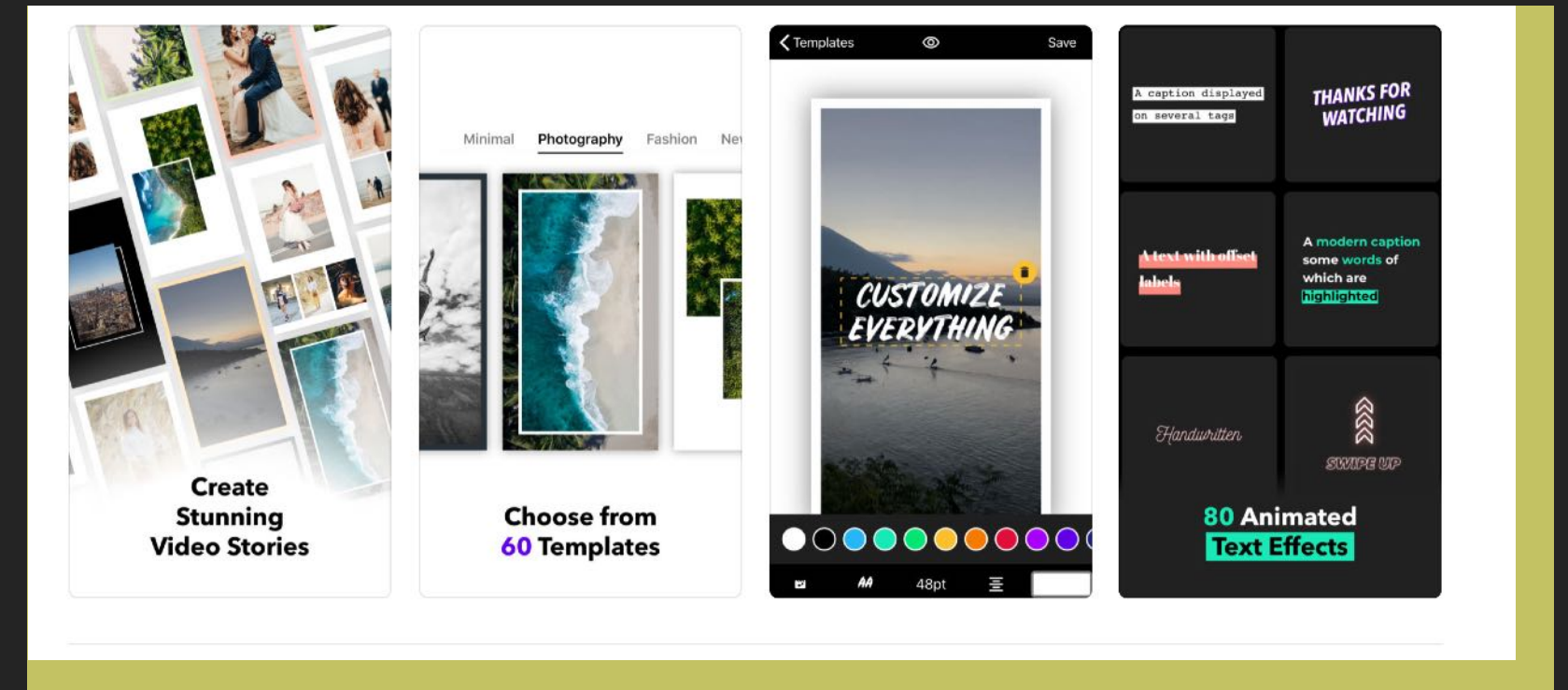
DIGITAL MEDIA RESOURCES



CANVA // Story Maker & Design Tool

Create free stylish templates and with easy design tools!
Use the graphics you create on Facebook/Instagram
Stories, Posts, and emails.

[> VISIT NOW](#)



MOJO // Video Story Maker

Create stunning video stories with customizable
design templates, animated text effects, and audio.

[> VISIT NOW](#)



part 4

**SURVIVE AND THRIVE
WITH INNOVATION**



INNOVATION

COMMUNICATION COMBINED WITH TEAMWORK WILL HELP YOU SURVIVE - **ADD INNOVATION** & YOUR ORGANIZATION WILL **THRIVE**.

COVID-19 and this crisis will pass. We will return to normal. Right now is a great time to learn what your team is capable of and create strategies to improve ways to build real connections with your followers, donors, and those who need your mission.

We are all facing a crisis. During this time we must be focused on taking advantage of building and developing innovative techniques that are practical for your every day operation and missional.

This means people are in need today who weren't a month ago — crisis creates the opportunity for you to exercise your mission muscle and serve differently and/or stronger than before.

Creative and intentional brainstorming meetings will help your team discuss ways to work efficiently, determine where unnecessary spending can be cut, and explore new techniques to communicate to your organization's network.

80% OF NONPROFIT LEADERS CONSIDER INNOVATION TO BE MANDATORY, YET OF THOSE, ONLY 40% THINK THEIR ORGANIZATION IS READY FOR INNOVATION.

Study conducted by the Bridgespan Group

ENGAGE YOUR AUDIENCE

No strings attached

Provide innovative experiences that engage with your audience. Interaction is key to making donors feel like a part of your story.

Social Questionnaires

Create a fun, shareable questionnaire that your audience can fill out and share with their followers.

Scavenger hunt

Engage your audience in a scavenger hunt, have a winner and a prize that associates with your agency goals!

Caption suggestions

Create a post and allow the audience to write a clever caption.

Start Conversations

What are some things you can get people talking and thinking about? Start conversations!



TIME TO BRAINSTORM

Internally create a document that outlines the different ways you can create experiences and moments for your organization's network to engage with your mission.

Determine different methods and tools that help advance your programs or share how your donors can be virtual volunteers and be purposeful at home!

If the current COVID-19 crisis is hurting your organization - chart out the most important thing that must be done to keep moving forward and survive.

Work as a team to assign deadlines and tasks so that the most important goals are addressed.

Discuss ideas of where to cut costs right now.

From unnecessary travel to renegotiating your contracts... now is a great time to talk as a team and determine ways to save and keep saving throughout 2020!

Record simple, candid videos that share updates from your team and volunteers. Share these videos online and with engaged donors!

Make a financial plan for what you'll do if the crisis lingers or the economy doesn't bounce back as quickly as we want.

Discuss and layout each scenario and/or trigger point. It is important to make an immediate plan, 2020 plan, and then a survival plan - just in case things get worse.

When the time comes, just follow the plan and execute out of wisdom not fear.

Create and design your yearly marketing plan. Discuss annual fund mailing dates. Determine if events need to be pushed back and when collateral needs to be mailed and posted.

Design a social media plan and incorporate monthly themes! Lastly, create a strategy and communication plan for your different giving levels and cohorts based on your donor data!

Tackle projects that have been placed on pause. Have an event planning and creative meeting. Take advantage of this time to get together as a team and discuss the things you have been wanting to implement!

As a team, discuss ways to simplify your operational processes and communication efforts. This will help you design simplified strategies that can be initiated and completed quickly.

If you haven't regularly and frequently met as a team, think of ideas and times to connect during the week! Be flexible.



part 5

**YOUR ENDOWMENT TO
THE RESCUE**



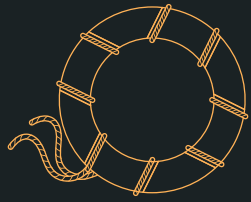


Protecting Your Nonprofit Fundraising Efforts

"Retain donors and volunteers, and retain talented board and staff members. Create an endowment, save, cut costs, share expenses with other nonprofits. Collaborate with other organizations to deliver expensive but necessary services and programs..."

Nouriel Roubini, Economist

Trevor Neilson
Contributor & Co-founder & President, Global Philanthropy Group i



YOUR ENDOWMENT IS YOUR **LIFELINE**

- NOW MORE THAN EVER, DIVERSIFIED FUNDING STREAMS ARE NEEDED TO BE STRATEGIC DURING TIMES OF UNCERTAINTY
- THOSE WITH A ROBUST ENDOWMENT ARE ABLE TO:
 - Weather economic downturns more easily
 - Relieve pressure on current fundraising goals
 - Provide independence from economic, governmental, or political influence
 - Build a pipeline of future gifts
- NON-RESTRICTED ENDOWMENT FUNDS CAN BE USED AS A SHORT TERM “LOAN” TO HELP THE CURRENT OPERATIONS RATHER THAN A LINE OF CREDIT
- ENDOWMENT FUNDS CAN PROVIDE A BRIDGE FOR CURRENT FUNDING NEEDS

HOW TO COMMUNICATE WITH LEGACY DONORS & LEGACY SOCIETIES

- LEGACY DONORS SHOULD BE TREATED LIKE MAJOR DONORS
- WHATEVER STRATEGIES YOU ARE USING TO ENGAGE WITH YOUR MAJOR DONORS, USE THOSE SAME STRATEGIES WITH YOUR LEGACY DONORS:
 - Be genuine - check on their health and safety
 - Be supportive - is there anything I can do for you
 - Be sensitive - isolation is difficult, be a friend and lifeline
 - Be solution oriented - do they need help with planning, finances, investment, retirement, etc... let them know that you are there should they need to connect with someone trustworthy to talk to
- SEND THEM THOUGHTFUL NOTES, EMAILS OR TEXTS
- CALL AND LET THEM KNOW YOU APPRECIATE THEM AND THEIR SUPPORT AND CANNOT WAIT TO GET TOGETHER WITH THEM AGAIN
- THE TIME YOU INVEST NOW TO CREATE GENUINE RELATIONSHIPS WILL BE TIME WELL SPENT FOR YOUR ORGANIZATION'S FUTURE AND THE DONOR'S DESIRE TO GIVE

COVID-19 RESOURCES

We are constantly updating the TAG Marketing portal with updates, sample letters, articles and information that can help you during these times of uncertainty.

VISIT
[TAGPGMARKETING.COM](https://tagpgmarketing.com)
FOR INFORMATION AND
ADDITIONAL TOOLS TO
HELP YOU SURVIVE &
THRIVE!

