



NONPROFIT

DIGITAL MATURITY MODEL for Marketing and Fundraising



Where is Your Nonprofit on the Digital Maturity Spectrum?

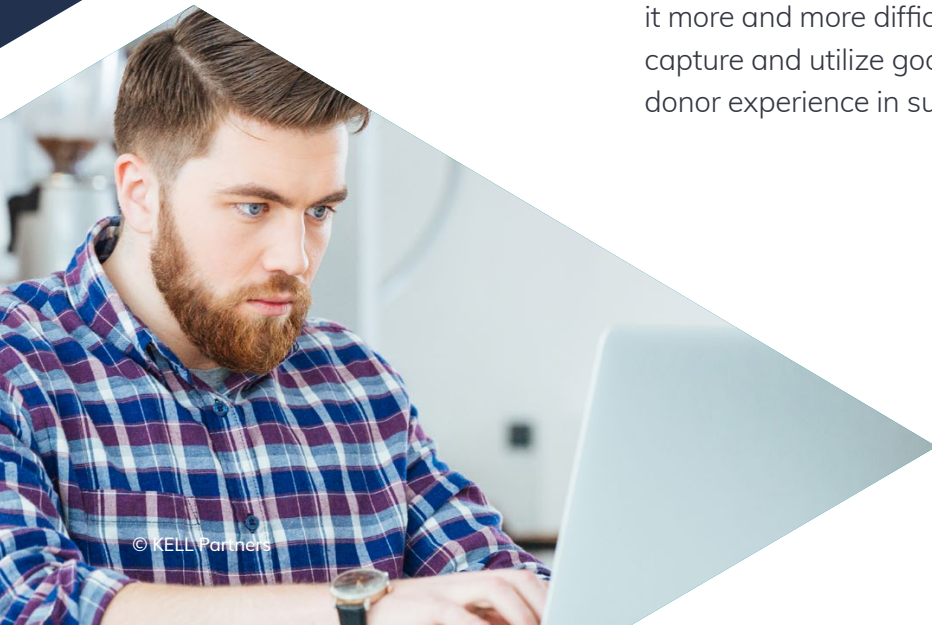
Let's face it, digital is both yin and yang. Nonprofits are benefiting from digital fundraising, which grew by 10% in 2019. But, they are also challenged by it. Email lists are shrinking (-2% in 2019), website interactions are moving to mobile devices (50% of traffic and 25% of revenue) and text message audiences grew by 26%¹.

The supporting technologies are many and the landscape of digital tools, privacy rules and donor preferences is shifting quickly. Adding new tools to support each new channel makes it more and more difficult for nonprofits to capture and utilize good data and deliver a great donor experience in support of its mission.

It's easy to find case studies about nonprofits that seem to do everything right, making us wonder, "Why can't we do that?"

With the digital landscape shifting like quicksand, an approach that is "more of the same" is often a recipe for stagnation. On the other hand, simply bolting on more tools to support each new channel can be counterproductive if it creates additional complexity, manual work and scattered messaging.

The solution, however, exists. Prioritizing investments in skills and technologies based on your organization's digital maturity can help lay strong foundations and build an effective support structure for improving your marketing and fundraising efforts.

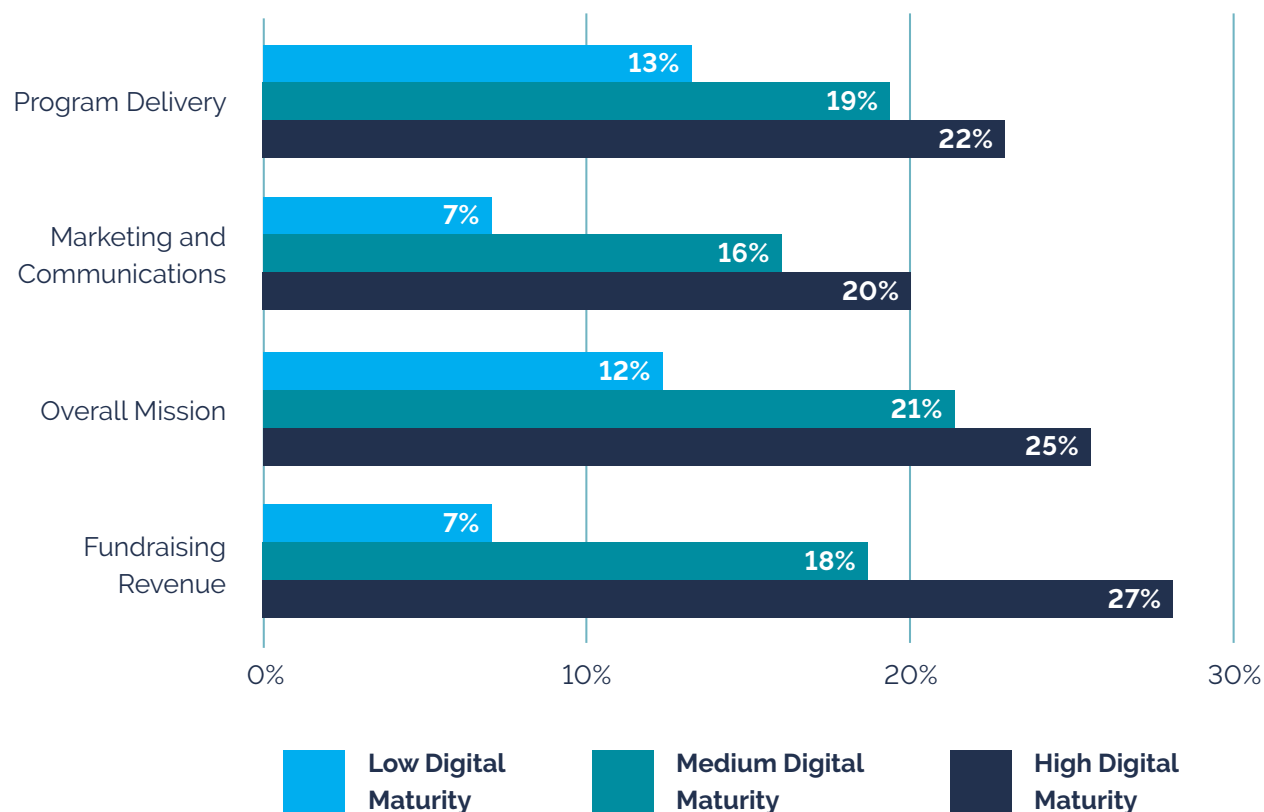


Digitally Mature Nonprofits Exceed Goals at Higher Rates²

Digitally mature nonprofits were more likely to have exceeded their goals across program delivery, marketing, fundraising, and their overall mission in the last six months.

High digital maturity was related most strongly to exceeding fundraising goals (27% for more mature organizations versus 18% overall).

NONPROFITS REPORTING EXCEEDING GOALS IN THE LAST SIX MONTHS



Source: Salesforce Nonprofit Trends Report, 3rd Edition, Nov 2020

Digital maturity is not about
doing 'more' digital things

Begin The Quest

In this guide, we will share what we've experienced in working with more than 1,200 nonprofits across the US and Canada. As we've helped our clients advance in their digital maturity, we've found that no single formula applies to all organizations. Often, the right next steps involve acquiring new skills, fundamentally changing how you engage with

your supporters and possibly even taking a step backward to make sure your foundational technologies can support your organization in the long-term. Choosing the "right" next steps begins with an honest assessment of where you are today and an understanding of how you want to support your mission in three to five years.



Where are you today?
Where do you want to
be tomorrow?

**Find out where your organization
stands on the digital maturity
spectrum.**



Identify your digital maturity level

1

EXPLORING

2

COORDINATED

3

INTEGRATED

4

INTELLIGENT

If you are looking to make a change, and to start standing out, your transformation starts here. The first step in your digital maturity evolution will be figuring out where your organization currently falls on our four-level scale. Then, plot out where you'd

like to be. If you haven't yet reached your goals, you can follow the rest of this guide for tips on how to progress. If you're one of those few nonprofits already delivering a best-in-class digital experience, this guide will help you optimize further.

1

Exploring

Digitally Opportunistic, Dabbling in Digital Initiatives

If your organization is just beginning to focus on the experience your digital efforts create for supporters and how technology can help you make that experience better, your digital maturity level may be best described as "exploring."

You've probably moved some of your fundraising and outreach efforts online and are dabbling in channel-centric tools. In this phase, it's important to align these efforts with your larger marketing and communication strategies.

DEFINING CHARACTERISTICS

Oftentimes in the exploring phase we see organizations using separate databases, standalone marketing and fundraising tools, and disparate success metrics. In some instances, they lack donor tracking systems. In others, we find data that is housed in separate, siloed systems, making it difficult and time-consuming to extract and analyze.

We also see organizations that work in silos, like having separate teams responsible for outreach to prospective and existing donors. This can result in inconsistent messaging in communications and fundraising campaigns.

Organizations in this phase also have trouble defining their technology needs and usually don't have a technology roadmap that aligns to their overall goals and plans.

Organizations in the Exploring Level...

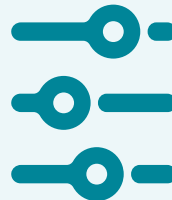
Often experience...

A bloated shared drive with spreadsheets in the absence of a CRM and a data warehouse

A calendar that drives campaign strategy rather than the other way around

A lack of visibility into campaign performance

Poor coordination between different teams



Begin to level up when...

The cost of inconsistent and mixed messaging becomes evident

They want to start planning strategic campaigns

Being "donor centric" becomes a lived mantra for the development teams

Growth goals are unattainable with the current rinse-and-repeat approach

The path forward

Coordinate Existing Efforts - Evaluate how your organizational structure and systems support or inhibit a more coordinated approach to engaging donors and capturing donor data.

› **Align teams with donor engagement efforts** -

How are your teams organized today? By donor segment? By channel? By campaign type? There's no one right answer, but be wary of having two disconnected teams trying to engage with the same set of donors.

› **Share metrics widely to foster discussion** -

At this early stage of digital maturity, more feedback and discussion is always better. Sharing metrics widely is a great way to make your data and metrics better and to reinforce the value of good data.

› **Organize data around online efforts** - As you explore new digital channels, be sure that you capture and organize data in a way that helps you understand the success of these efforts. Avoid the temptation to simply plug new data into an existing data infrastructure that's designed to analyze multi-year trends instead of new initiatives.

Focus on Building Data into a Centralized Location

Once you understand your data needs and you identify data gaps, you can centralize core donor data within a flexible CRM that can grow with you.

› **More than just transaction data** - If your goal is to build engaging digital experiences for your donors, you're going to need to capture donor behaviors and preferences as well as their transactions.

› **Make a donor data wish list** - If you could know anything about your donors, what would it be? Start with the questions you would ask, then move on to actual data that may answer those questions. You may find that you have tools to capture at least some of that data already.

› **Who will use the data and how** - A great way to ground your efforts at organizing and centralizing data is to consider who in your organization will actually use the data and how they will use it to be more effective.

Continue to Experiment in New Channels

You don't need to be active in every channel, but don't stop exploring once you've found something that works.

› **Learn from what works and what doesn't** - the channels and strategies that don't work for your donors can often be as insightful as those that do work.

› **What data do different channels offer** - Apart from your level of success, pay attention to the kind of data that each channel offers. You may discover new ways to evaluate success or learn more about donor behaviors.

› **Deep is better than wide** - Developing expertise within a given channel can take time. While you should keep exploring, you're better off going deep in a few channels than trying to dip a toe into lots of channels at the same time.

Escape The Volunteer Trap

Volunteers are often the backbone of small nonprofits. But, your chances of moving up the digital maturity curve with just volunteer tech help are slim. Now is the time to define a role that is responsible for ensuring that your systems and data are helping you pursue your

mission. This can start as a part-time role and evolve as your organization matures. In the Salesforce world, this role is a Salesforce Admin. Check out our [Virtual Salesforce Administration services](#) to get an idea of what this kind of role entails.



2

Coordinated

Orchestrating a Consistent Digital Experience

Nice!! You've learned a lot about your digital needs from your hands-on experience over the past few years. You've found a way to deliver a consistent and coordinated donor experience across multiple channels and touchpoints, and you're getting good results.

But, even with good performance in your digital marketing and fundraising, you're starting to see cracks in your technology foundation, especially if you're using a collection of disparate, siloed technologies to manage donor data and execute campaigns across different channels.

DEFINING CHARACTERISTICS

Your data may be inconsistent and difficult to maintain. Most data "connections" are done via nightly batch updates, manual imports and file transfers. It can sometimes feel like you live in a world of "lists". Even when all your data is pulled into a single CRM, it's difficult to maintain consistent and timely donor data that originated in different digital tools.

If you've bolted together a variety of marketing tools, your tech stack as a whole may feel inflexible. For example, by making a data change in one channel, corresponding data changes may be required in subsequent connected systems because they don't talk back-and-forth to one another. Keeping new tools and channels coordinated and connected is becoming more expensive and time-consuming.

This type of "bolted together" tech stack cannot support the growth plans of your organization. You may have saved money during the early days of digital marketing and fundraising; however, the complexity and cost of maintaining such a tech stack is becoming unsustainable.

Organizations in the Coordinated Level...

Coordinated

2

Often experience...

Higher quality engagements and campaigns that lead to more donations

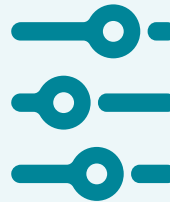
Expertise in coordinating systems to work for the organization's mission

Team processes are manual, but are aligned to deliver a consistent donor experience

A better understanding of mission-critical data and system functionality needs

Point solutions that are loosely connected together

Individual tools work well but the tech stack as a whole is complex and fragile



Begin to level up when...

They recognize that their current approach will not scale to meet the growing mission

They start to notice specific gaps in the systems that intersect the most in their daily activities

The benefits of specialized systems are outweighed by the human resource costs to keep those systems connected

They've done enough manual work to quantify the value of integrated marketing and automation

System failures and fragility prevent them from responding to new opportunities quickly

The cost of poor data quality becomes more obvious

The path forward

Planning for a New/Updated CRM – it's time to use the lessons you've learned about your data and system needs to build, or rebuild, your core CRM in a more purposeful and organized way to support your mission.

- › **Evaluate Your Options** - Look for systems that are open and flexible with a large community of happy users. Pay attention to the scope of solutions that each CRM offers beyond specific digital needs. Your CRM should not just be another “point solution”.
- › **Don't Forget The Data** - This is your opportunity to transform your data to make it more usable and valuable rather than just migrating it for record-keeping to a new CRM.
- › **Give Yourself Enough Runway** - Selecting and implementing a new CRM can easily take 12-24 months. Make sure your teams, technology and budget are aligned.

Graduate to Marketing Automation - A well architected CRM will allow you to shift your focus from building campaigns to building donor experiences with the help of an integrated marketing automation solution.

- › **Not Just Email Marketing** - Look for marketing automation solutions that allow you to send outbound messages (email or text) based on triggers that listen for specific events or behaviors. We call these “always on” campaigns, and they're the foundation of a great donor experience.
- › **Think in Terms of “Journeys”** - Find a solution that will let you plan and deliver a custom “journey” to each supporter in ways that are impossible if you're running every campaign as a batch.
- › **Don't Forget the Data** - Look for systems with native or well-tested integrations to your core CRM. The power of marketing automation lies in its ability to capture and respond to individual donor behaviors. Reliable integration with your CRM is a ‘must have’.

Think ‘integration’ with new channels -

If you need to add standalone tools, make sure they integrate with your CRM and marketing automation suite.

- › **CRM integration becomes a ‘must-have’ for new tools** - Beware of flashy new tools that look great but don't integrate with your CRM. You don't want to go back to the days of spreadsheet lists and file imports/exports.
- › **Avoid systematic data duplication** - You'll never completely eliminate data duplication, but make sure that new channels and tools aren't systematically and predictably creating duplicate donor records.
- › **Assess the donor experience impact** - Now that you're using an integrated technology stack, disconnected tools increase your risk of delivering confusing messages and experiences to your donors.

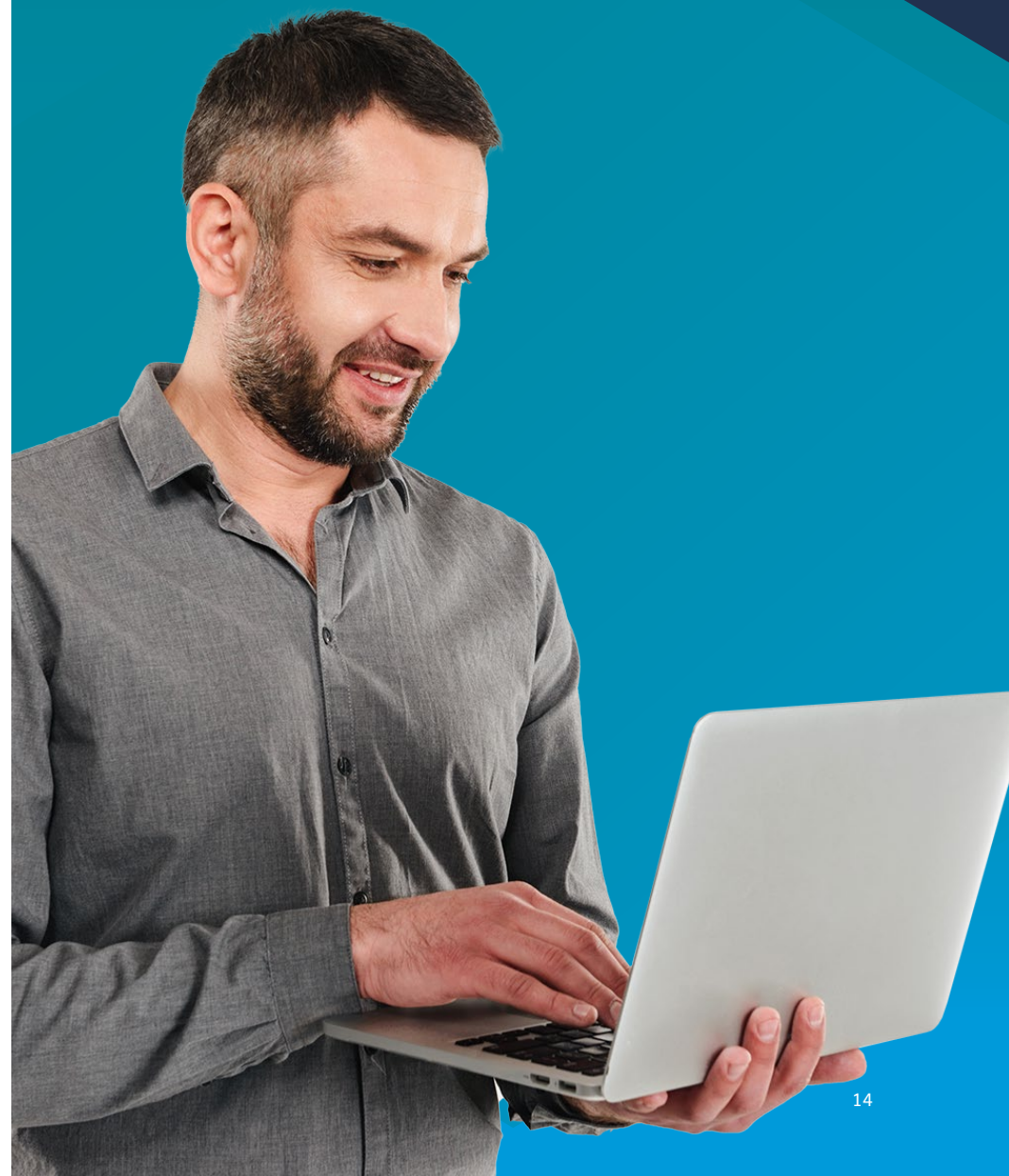
Resist the Urge to Track Everything

It can be tempting to want to track every little thing that happens across all of your systems and donor interactions. Some people say that “more data is better than less data”. We would say that “data that is used more is better than data that is used less”.

Prioritize your data for what will help you make the most important decisions.

Check out our guide to [“Fundraising Metrics that Matter”](#) to get started.

You can always capture more and better data. With an open and flexible system like Salesforce, you can always make adjustments to what data you capture and how you use that data.



3

Integrated

Connecting the Pieces to Create a Bigger Picture

You're experiencing what it means to work smarter instead of harder. Your investments in marketing automation and a CRM are paying off, and your campaign focus has shifted from simply getting things done to improving how you

engage with donors. At this level, you have more flexibility and control, so marketing campaigns tend to be more strategic and targeted with a greater emphasis on measuring results.

DEFINING CHARACTERISTICS

From a technology perspective, you're capturing much more data into a robust, scalable CRM.

Many organizations at this level of maturity also have a marketing automation solution in place that can listen for and report back on donor behaviors and preferences across channels. While you still run seasonal campaigns, much of your donor engagement is "always on." It may not be perfect yet, but your days of shuffling spreadsheets, laboring over "lists" and manual data imports are over. Woot, woot!

Your organizational focus has leveled up, too. Because results are being measured against a repeatable set of metrics, your teams can focus on the quality of their campaigns and begin to analyze the journey someone may follow from being a prospective donor to a fully-engaged supporter. Your perspective is starting to shift from an internal focus on execution to an outside-in view of the experience you're creating for your constituents.

Organizations in the Integrated Level...

Often experience...

Quicker time from idea to action

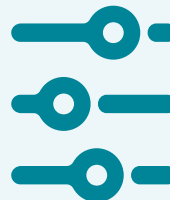
Better control over resource management

Visibility into campaign performance by channel

More efficient use of time for team members

Lots of good data to analyze

The move from an all-or-nothing approach to a segmented approach



Begin to level up when...

They start creating unique messages and journeys for each prioritized donor segment

Tracking donor behaviors generates new ideas for engagement

They put useful, real-time information in front of the key decision-makers

They have enough good data to see the value in predictive technologies

The path forward

Start Messaging Relative to Segments - With your baseline messaging and campaigns in place, it's time to start focusing on specific donor segments.

- › **Define donor segments** - The first step in creating a segmented messaging approach is to define your unique donor segments and understand what makes them unique. Segments may be a combination of who the donors are, how they support your mission and how your teams engage with them.
- › **Define messages and CTAs** - Now it's time to customize your messaging to each segment. Consider not only the characteristics of each segment but also what you will be asking of them (your call-to-action).
- › **Leverage marketing automation** - In the past, customizing your messaging to different segments required lots of lists and duplicate work. Marketing automation enables you to do send custom messages to custom segments at scale.

Personalize Donor Journeys - With your marketing automation system, you can effectively monitor your constituent's content preferences. Pair this with your segmentation insights to build personalized conversations.

- › **Start with common milestones** - If you haven't created basic donor journeys, start with common milestones like a first donation, a lapse in donations or a change in donation level.
- › **Think like a donor** - If you've already created basic donor journeys, find ways to make those journeys more personal to unique donor segments. A great way to do this is to think like a donor instead of a fundraiser.
- › **Test, test, test** - Creating a more donor-centric digital infrastructure will require time. Your first attempt will likely be an improvement but there is a long way to go. Continue to test everything that you create.

Throw Out the Calendar - the more you can shift communications to respond to constituent actions, the better their response will become.

- › **Create campaigns based on behaviors** - A strong CRM and marketing automation suite enables you to create campaigns that watch for and respond to donor behaviors instead of asking them to respond to yours.
- › **OK, you still need a calendar** - We wouldn't advocate eliminating your annual appeal, but your strategic campaigns should be driven more by donor behaviors than specific dates on the calendar.

Make Data Your Superpower

The data created by all of your stakeholder interactions is quickly becoming your organization's most critical and strategic asset. Make sure that you invest sufficient resources in the care and feeding of your data.

- › **Data stewardship** - Who is paying attention to the quality of your data?
- › **Data analysis** - Are your reports and analytics backward-looking or forward-looking?
- › **Next Level Skills** - Have you started exploring how predictive analytics or artificial intelligence could help your decision-making?



4

Intelligent

Scaling Technology to Scale Donor Engagement

After a lot of diligent work, your level of digital maturity is extremely high. You're running personalized campaigns across channels based on donor segments and behaviors. Your planning

and digital donor outreach is now less about technology and more about how to engage with donors, advocates and other stakeholders with an individualized and well-honed personal touch.

DEFINING CHARACTERISTICS

On the technology front, your marketing automation solution is making it easy to coordinate messaging and campaigns across channels. All data from digital campaigns and personal outreach is being captured into a well-organized, scalable CRM solution. You're focused much less on execution and much more on optimizing the performance of your donor pipeline.

The skill and focus of your teams have evolved with your technology. Now they spend time working on creative ways to speak more directly to targeted donor and supporter segments. Reporting and analytics used to be a monthly slog of data manipulation in spreadsheets. Now analytics are something that your teams monitor to validate performance and learn new insights with the goal of finding new ways to become more donor centric.

Organizations in the Intelligent Level...

Often experience...

Major improvements in fundraising performance

Loyal supporters who turn into donors and advocates

Campaigns that go viral

ROI from technologies that others consider
"bleeding edge" like AI and predictive analytics



The path forward

Take ‘Donor Centric’ to another level

- Being donor-centric is easier said than done. It can take hard work and time to fully change your organization’s mindset.

› Re-examine ‘tried and true’ campaigns

- When all you have is a hammer, everything looks like a nail. Now that you have lots of well-functioning tools, go look for nails to make sure they’re not something else

› Get out of the channel-centric mindset -

Where else are old habits pulling you away from being more donor-centric? Evaluate your metrics and reporting - are they still channel-centric?

Be Diligent about data quality and data

integrity - with a strong CRM and marketing automation suite, the quality of your data is even more important than ever.

› Seek out and fix ‘leaks’ in your data quality

- Maintaining data quality and integrity requires regular attention. When you see issues, dig deeper to identify the source of problems. Your data “leaks” may arise from system issues, campaign design or even user training issues.

› Ensure systems reinforce data quality -

Create systems to identify and escalate known data issues. Create and distribute reports and dashboards that measure data quality and highlight potential problems.

› Identify gaps in donor data -

Not all data issues come from bad data. Look for data that you want to capture but aren’t for one reason or another. Addressing these gaps can be as valuable as fixing more explicit problems.

Leverage Predictive Models for New Donor

Insights - Shifting your attention from analyzing past behavior to predicting future behavior can have huge positive impacts on your performance.

› Start with forecasting -

You don’t need super-sophisticated tools to start predicting donor behaviors. Start with basic forecasting. It’s not as sexy a term as “predictive models”, but it can be a great place to start.

› Focus on learning, not hype -

When you do start using more sophisticated data analysis and predictive models, it’s easy to get lost in the hype of AI and machine learning. Stay grounded with a disciplined goal of making some aspect of your donor engagement more effective.

› Learn about your own data -

Most predictive models rely heavily on a large volume of relatively good data. As you explore these new technologies, you may learn new things about your own data - both good and bad.



Striking the balance

1

EXPLORING

2

COORDINATED

3

INTEGRATED

4

INTELLIGENT

While it is tempting to aim straight for Level 4, the right next steps for any organization are based on its level of digital maturity. That means considering current organizational needs, available resources, skills, and most importantly the expectations of your supporters.

By acknowledging the context that frames your organization, you may conclude you're more than happy at Level 1 (Exploring) or Level 2 (Coordinated). With that in mind, determine if your digital maturity is appropriate for where you need to be. If you see that you are falling behind (perhaps in comparison to your peers), it could be time to start accelerating your plans.



Final Thoughts

A good strategy consultant who understands technology and has guided organizations through the transformation to integrated donor success can help you identify the strategies that will most likely work for you. They can also assess your current capabilities and help you develop a phased plan to reach your goals based on organizational priorities and realities.

By getting access to world-class CRMs, marketing automation, apps and expert partners, you can find more success as an organization and continue to improve and build on an industry-standard data architecture.

1. M+R Benchmarks Study 2020, <https://mrbenchmarks.com/insight>
2. Salesforce Nonprofit Trends Report, Nov 2020



About KELL Partners

KELL Partners is a consulting firm specializing in Salesforce solutions for nonprofits.

KELL Partners has helped over 1,200 nonprofits implement and train on the Salesforce platform. With services ranging from KELL360™ to implementations with complex custom needs, application development and data migrations. KELL Partners provides the expertise to set up and configure Salesforce, along with the hands-on training, guidance, ongoing support and consulting nonprofits need to ensure success.

We want to hear from you!

If you want the lowdown on services, solutions, support and all the red-tape-defying feats we can do for orgs like yours, get in touch.

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