

The Bonsai Bush, the Orange Tree and the Saguaro Cactus

Let's Level Set Your F2F Stakeholders

Presenters:

Sherry Bell, President, PFFA Board of Directors and CEO, Grow Fundraising & Consulting Inc.

Michael Scully, Founder & CEO, Zenterprise and Co-Founder, Britevox



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Agenda

- Who's who?
- Identifying your stakeholders
- Which F2F program do you have? Want?
- What do trees have to do with my F2F program?
- Top Line Program Audit
- Channel Diversification - what is the next big idea?
- Summary

Who is Sherry Bell?

- Founded the Working Group for F2F in 2014
- Volunteer leading the PFFA since formation in 2016
- Founder & CEO of Grow FC US
- Experience in F2F since 1998
- Began fundraising and retention journey in 2005
- Worked for both nonprofits and for profits
- Fur-Mom of Benson



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Grow Fundraising
& Consulting



Who is Michael Scully?

- Co-Founder of Britevox
- CEO & Founder of Zenterprise

What is the PFFA?

The Professional Face-to-Face Fundraising Association

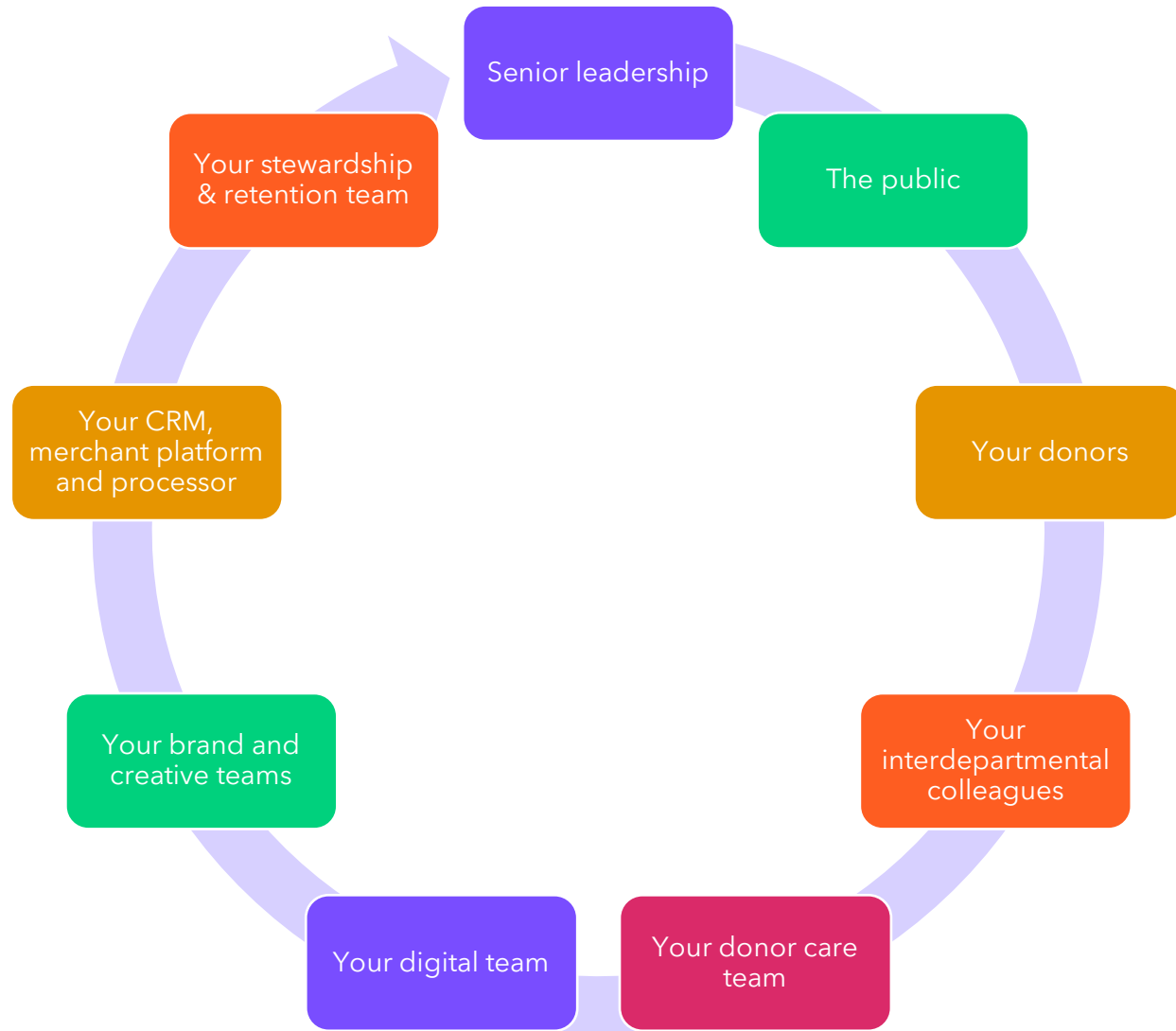
A nonprofit, self regulatory organization

Nonprofit led board

Membership Organization with nonprofit and for-profit members

More than 50 members

Who are your stakeholders?



**So which program do you
have?**



If you are
counting on your
magic 8 ball...

don't!



The Bonsai Tree

Bonsai trees are hard to grow for beginners. This is because of the **constant maintenance, care, and patience required to successfully grow bonsai**. It also takes years of pruning and growing before a new plant will start to resemble bonsai, and so can be frustrating if growing from scratch.¹



1. <https://plantpaladin.com/are-bonsai-trees-hard-to-grow/#:~:text=Bonsai%20trees%20are%20hard%20to,frustrating%20if%20growing%20from%20scratch.>

The Orange Tree

An orange tree needs **lots of water, good soil, proper drainage, and to be weed free** - Still, a range of **viral diseases can kill your otherwise healthy orange tree**.



The Saguaro Cactus

- Slow and steady growth.
- Warmth, water, time.
- Full grown Saguaros can store up to 200 gallons of water which makes is extremely resilient.



Channel Optimization

- When you have completed an audit and have considered all points on the checklist.
- When 90% of best practice at each stage is achieved: Bonsai > Orange > Saguaro
- When changes translate into program performance boosts.

Program Audit: Technical & Financial

CRM

Processing platform and merchant processor

Reporting

Inbound calling

Bank

Retention

Program Audit: Sustainer Retention

Sustainer Journey

Nonfinancial engagement

Frequency of contact

Testing, Testing

Donor communication preferences

Communications audit

Leverage social

Business rules for well, everything

Program Audit: Fundraiser Retention

Fundraiser career path

Monthly brown bags

Fundraiser field visits

Contests, bonuses, rewards

Buttons, badges, swag

Annual trainings

Updated materials

F2F page/F2F on SM

Mystery Shopping

F2F field time/a day in the life

Gratitude

Business rules for inbound fundraiser/employee complaints

Program Audit: Donor Care/Services

Business rules for
inbound calls,
posts, emails,
SMS, letters

Training - F2F
101

Scripting

Processing

Reporting

Verifying

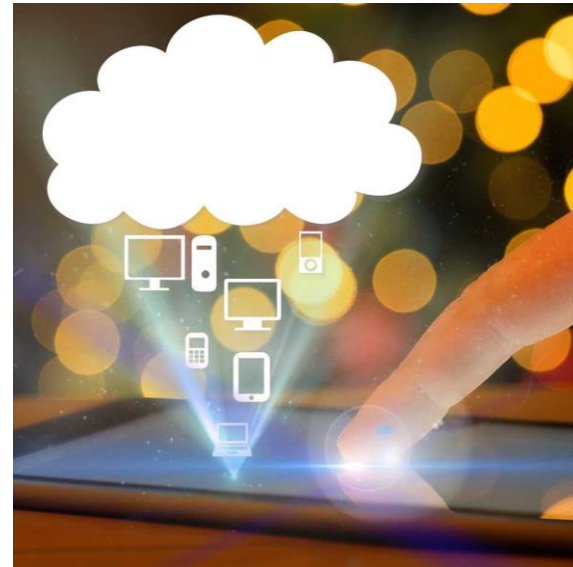
Incentives and
contests



Program Audit: Brand Risk Mitigation

Program Audit: Channel Integration

Digital and F2F are an excellent fit



Program Audit: Channel Integration

What about mobile and SMS?



What about outbound TM?



Is DM appropriate for F2F?



Channel Diversification: A Fresh Idea...



CONTACT US

**Thank
you!**

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