

# THE NEW MODEL OF MOVES MANAGEMENT FOR EFFECTIVE FUNDRAISING



DEVELOP MORE ENGAGED DONORS BY  
INCORPORATING SOCIAL DATA TO BUILD  
RELATIONSHIPS & INCREASE INVOLVEMENT

# Executive Summary

David Dunlop, the Cornell University senior development officer who developed the concept of moves management, has described the idea as “changing people’s attitudes so they want to give.” Moves, he explained, help “develop each prospect’s awareness of, knowledge of, interest in, involvement with and commitment to the institution and its mission.”

A successful moves management model, at its core, takes specific, targeted, quantifiable efforts and actions to shift influential donors or members from a passive or one-time contribution to an active, ongoing relationship with the organization that takes place through multiple channels and feedback opportunities. As Dunlop’s comments

make clear, the goal is to encourage moves that increase engagement and involvement, long-term loyalty and, ultimately, giving.

The challenge for today’s member-based organizations and nonprofits, however, is to determine how to best develop and nurture a deep, long-term relationship with key “influencer” prospects in ways that go

beyond traditional transactional interactions — yet are also measurable, trackable and easily automated to “set and forget.” Transactional interactions — such as soliciting annual dues, sending holiday party invitations or coordinating volunteer committees — are essential, of course, and through them your organization becomes an integral part of a donor’s life.

But to grow and maintain a healthy, vibrant donor community that fuels your mission and reaches for future goals, how can you nurture key relationships in ways that are truly donor-centric, multi-dimensional and mutually beneficial? How can you engage with your best constituents year-round, without necessarily asking for money or time, in ways that still help you stay on the right moves management track toward effective fundraising?

**The answer:** Incorporating social data, through the use of social CRM tools, into your moves management efforts.

CRM, or constituent relationship management, is the technology tool that can help you manage your moves management strategy in an effective, trackable, integrated way. Want to add increased engagement, ongoing relationship building and human, natural interaction? That’s where the magic of social data, which is tracked, analyzed and managed by CRM technology, comes into dynamic play. That is the power of *social CRM*.



# The New Social World:

## *An Exciting Environment To Nurture Moves Management*

Social media has become an increasingly important, fast-growing part of nearly every organization's efforts to increase engagement and build long-term donor relationships. According to the *2012 Nonprofit Social Network Benchmark Report*, 93% of nonprofit respondents have a presence on commercial social networks, such as Facebook, Twitter, LinkedIn, YouTube and Pinterest, and growth has been fast and furious over the past year. For example, study respondents' Facebook pages grew in terms of number of "Likes" by 30% compared to 2011 results, while respondents' Twitter followers expanded by 80%.

This growth and increased level of commitment in the social media space comes as no surprise: After all, Facebook has grown to over 800 million worldwide active users, adding more than 200 million in just one year, while Twitter boasts over 100 million users, and over 64 million North Americans alone use LinkedIn. It's clear that the social space is where members and donors spend a good portion of their time. According to Nielsen Research, social networks and blogs account for nearly one-quarter of all time spent by people online — and U.S. Internet users spend three times more minutes on social media than on email.

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- 2012 Nonprofit Social Network Benchmark Report

Thanks to the power and possibilities of social media, times have certainly changed when it comes to engaging with influential donors through a moves management model: Your donor is now firmly in the driver's seat, actively speaking up when he/she wants, sharing thoughts freely with others and participating on his/her own terms. But while the dizzying rise of social media may occasionally seem daunting, these networks also offer exciting, unprecedented opportunities for nonprofit organizations to improve and expand on moves management efforts that increase engagement and build relevant, two-way relationships — leading to more effective fundraising.



In fact, a recent study by NetwitsThinkTank.com found nonprofits that take advantage of social networking sites, such as Facebook, Twitter and YouTube, communicate with their networks more regularly and send more messages, leading to increased fundraising results by up to 40%. However, while many nonprofits use social media sites for direct fundraising (46% of the 2012 *Nonprofit Social Network Benchmark Report's* respondents said they do), there are other essential ways you can take advantage of the power of social media toward more effective moves management and increased engagement.

The latest social CRM tools can help you meet and even surpass your donors' increasing expectations regarding social media, which include:

- Being able to network with personal or professional peers;
- Being aware of conversations on social networks involving the organization; and
- Offering prompt responses to questions, complaints and concerns posed through social media.

By helping you make sense of a bountiful array of social profile information in an organized, trackable way — everything from status updates to professional information and recreational interests — you can apply the power of social CRM technology to take your moves management model to the next level in terms of engagement and long-term relationship building. That is, you can go right to where today's active, influential donors are and communicate with them in a personalized, relevant way that moves them along the journey toward increased engagement and donations!



# Boost The Bottom Line:

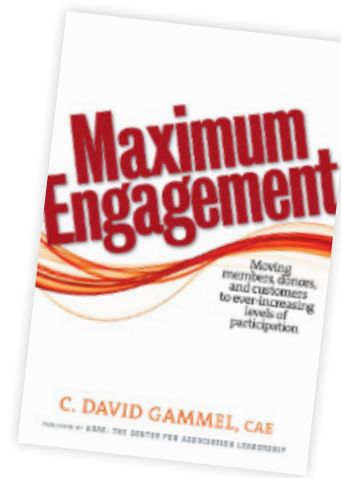
## Transforming Social Data Into Actionable Data

If you are willing to invest in developing authentic, real-time interaction and engagement with donors through social data and its transformation into actionable data, you will begin an ever-evolving engagement process that provides a significant bottom-line return. Your donors will likely begin to move along what author C. David Gammel, in his book *Maximum Engagement*, calls the “engagement acceleration curve.”

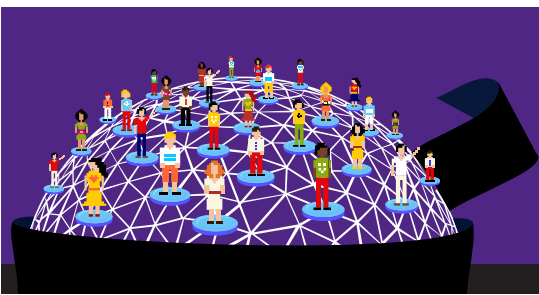
The idea, Gammel explained, is that key members and donors can be encouraged to move toward increased active participation and engagement, spreading the word about important issues and contributing to your group’s overall mission. Through a 360-degree view of your constituents, you can build the kind of long-term loyalty that leads to thriving organizational growth and boosts bottom-line results when it comes to education, networking, fundraising and community.

But how do you get a full view of your key donors’ involvement that helps you to reach your moves management goals? Five important areas of focus have been identified:

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Purposeful relationship development incentivizes community and word-of-mouth influence. The book “Maximum Engagement” highlights how to use social media to shift people toward greater engagement, as well as a self-assessment to determine your organization’s readiness and tips to optimize audience interactions.



# 1. Manage Moves Holistically Throughout A Donor's Lifecycle

In her book, *Donor-Centered Fundraising*, author Penelope Burk points out that “donors are people too.” That is, fundraising is not just a numbers game. It's about engaging donors in a two-way dialogue that goes far beyond the traditional transactional approach of simply asking for annual contributions.

To achieve that well-rounded, holistic view that boosts moves management (including your bottom line), social media is invaluable throughout the donor lifecycle. You can listen and respond to your donors' interactions on social media sites; you can capture, gather and consolidate social information; you can analyze social information and allow it to inform future decisions; and you can prioritize and automate responses to incoming data in order to react promptly, in the most relevant way, to your donors' needs.

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## 2. Increase Engagement & Involvement By Leveraging Social Data

As we have described, the latest organization-friendly tools can provide you with everything you need to nurture relationships with key prospects and donors through the exciting and opportunity-rich landscape of social networks. And, it can do so in a smooth, seamless way.

With the right social data options that help organize, analyze and automate, your foray into social media can become a natural progression toward increased engagement on all fronts, whether it is sharing content online, attending a conference, writing or speaking, volunteering for a committee, serving in a leadership role, buying advertising or donating large sums of money.

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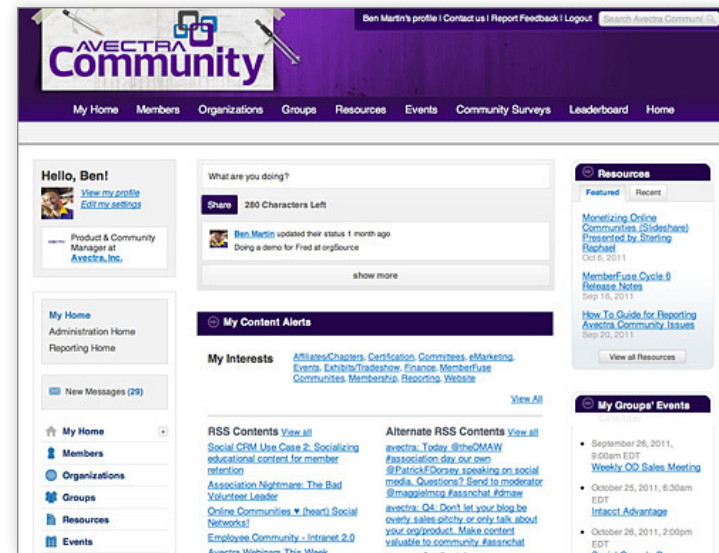


### 3. Provide Private Platforms To Connect With Donors

While public social networks offer an incredible opportunity to leverage data, there are new tools that help you create a closed, dedicated online community that can help increase participation and allows you to control its look and feel, advertising and access. You can observe, analyze and sometimes steer the conversations to resolve issues, all within a private platform. You can add value in terms of what is relevant to your donors instead of letting outside social networks control the conversation, the commerce and the data.

A private —donors only— community is a new model of networking that highlights your donors and the relationships between them, as your most valuable asset. You don't need to give that value away to an outside company via public social media platforms. Instead, you can offer a safe space for your donors to connect and collaborate by sharing documents, discussing opinions and networking. This becomes a value-added offering to your donors, while at the same time you gain the opportunity for ongoing analysis, measurement and reporting which helps you stay relevant to your donors, offer targeted and pertinent information, and anticipate their future needs.

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## 4. Monitor The Motivations For Moves Through Social Media

By listening to and monitoring the feedback and activity of donors across multiple social media platforms, you can find out how your relationships are really panning out in terms of comments, reviews, concerns and motivations. You can monitor, organize and analyze, and finally, respond to those conversations by publishing relevant, timely content, creating personalized messaging and offers, and planning future campaigns that meet their needs.

There's no doubt that more and more of your donors' online interactions are taking place on social media platforms, but they don't have to happen without you in the picture. In fact, today's social media users expect, and want, the communities they are a part of to understand their needs and respond appropriately. Serving your constituents, after all, is central to your future and to your bottom line.

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## 5. Measure The Impact Of Moves Management For Powerful Results

As with any organizational effort, for a moves management effort to work, it must be quantifiable. The most successful organizations are those that are able to track their progress toward creating increased donor engagement, while providing evidence of their short-term and long-term success.

The sheer amount of social data and sources, while incredibly valuable and filled with opportunity, can make measurement and analysis seem daunting — and possibly stop a perfectly well-oiled organization in its tracks. But what if you could consolidate all of that member information into one single dashboard, and produce a single score based on qualitative and quantitative analysis, which is easily visible and simple to decipher? And, what if resulting responses and campaigns could be automated and triggered to handle various donor questions, problems or communications? Through social CRM, you can do just that — resulting in a stronger bottom-line focus, an efficiency boost, and freed-up resources for other projects.

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## Conclusion:

### *Dynamic Moves Management Through The Seamless Use Of Social CRM*

According to an article in the *Nonprofit Times*, with today's still-struggling economy, nonprofits need to "work harder than ever to cultivate strong relationships with constituents if you are going to compete effectively for donor dollars." Moves management focuses on developing the donor relationship — and not just soliciting donations — with the long-term goal of moving toward greater giving.

Social CRM for nonprofits has a similar goal. According to social media firm Socialfish, the simplest definition of social CRM is "the discipline of applying social media to donor management." It is, at its heart, a philosophy and a strategy about long-term relationship building that is supported by powerful technology tools.

With the sheer scale of your donors' presence on social networks, both commercial and private, the power of social data as it applies to moves management is undeniable — including everything from the information on social media profiles about key and influential constituents' lives; to donor interactions with peers and with the organization; to their connections with others. All of this information can be used to boost your moves management efforts with the donors and prospects that matter most.

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- *Nonprofit Times*

Moves management, as conceived by David Dunlop at Cornell University, was meant to add a sense of discipline to the fundraising and relationship-building process with key, influential members that ultimately boosts an organization's bottom line. Today's social media space offers unprecedented opportunities to increase engagement and build long-term relationships — while social CRM tools add the layers of discipline and science that moves management requires.

The excitement and opportunities surrounding social media show no signs of slowing down, as news of the rapid rise of Pinterest and the acquisition of Instagram by Facebook make clear. You can harness those boundless opportunities with the goal of boosting your moves management model through the use of social CRM.



# About Avectra™

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For almost 20 years, Avectra has translated the business needs of associations, not-for-profits and member-based organizations into market-leading software and award-winning services.

We automate your business, so you can focus on serving your members. And with Avectra Social CRM and an array of social business solutions, our mission is simple:

Enable organizations to engage both internal and external audiences in more sophisticated, relevant and transparent relationships to promote advocacy, community and action while driving business value.

## **John Clese, Director of Product Marketing, Not-For-Profit for Avectra**

John Clese is a longtime fundraiser with extensive and diverse experience in the fundraising and not-for-profit space. He leads Avectra's product development for fundraising capabilities within netFORUM. John previously served as CEO and Executive Director of the YMCA at Martha's Vineyard.



Follow John on Twitter

