Persona-Based Marketing

Changing your marketing approach to
consider persona-types of constituents

Intro

I'm a nonprofit, not a marketer.
Why does this stuff matter?

Whether you know it or not, you're a marketer. Do you communicate to more than internal employees or team members? Yup – you're a marketer. As such, it's vital to know how to communicate effectively. Many orgs spin their wheels, trying to gain traction with a disinterested donor base. We're here to be the nudge to get you back on the road.

1. **ABE is the new ABC.** Turning an old sales adage into an impactful ideology.
2. **Keep me engaged!** Contextual communicating.
3. **Who are you?** Stage-based versus persona-based communication.
4. **You Should Know Who Your Friends Are.** Persona-based constituent engagement.

Marketing isn't as tough as people make it. Focusing on a few of these key elements will turn your life around. Or at least they'll help you communicate better.

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CHAPTER 1

ABE is the new ABC

Turning an old sales adage into an impactful ideology

It's time for some real-talk. It's too often in the nonprofit sector that the phrases "always be closing" or "always be asking" come up in regard to donors. This outdated sales adage may work for some, but let's be honest: by constantly asking donors over and over for a donation, they're getting burned out.

Transform Fundraising Results: Take Donor Engagement to the Next Level

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Think about it this way. Would you want to be friends with someone who is constantly emailing you, sending you letters, calling you, texting you – and all they do is tell you about themselves and ask for something? No! A real relationship is beneficial for both parties. It's time to stop thinking of our donors as ATM machines, and start thinking about them as friends we give back to.

A new way of thinking about your donors

Instead of ABC – "Always Be Closing" – let's reframe that mindset to "Always Be Engaging" – ABE. Start thinking about how you can give back to donors by keeping them engaged – emotionally, physically, and mentally. Our friends at Masterworks have been pulling together some great research around the fact that engaging donors on a holistic level is the future of donor relations: "behavioral economists believe engagement is *the* definitive predictor of growth in our marketplace today."

> *"Engagement is the definitive predictor of growth in our marketplace today.*

Constituents are more likely to be loyal to your organization if they are presented with opportunities to stay engaged and connected, not by being treated like an ATM.

Pop the big engagement question

We'll really dive into engagement in the upcoming chapters, but let's start with a little exercise. To look for commonalities in your constituent base that can get you started down the path of ABE, ask yourselves some of these engagement questions:

1. **Do some research.** Try talking to some of your loyal supporters. Ask them why they have stayed engaged with your mission. Why did they get engaged with you in the first place? How do they want to engage?
2. **Take inventory.** What engagement opportunities do you currently offer? Are there any ways people want to be engaged that you don't offer?
3. **Types and frequency.** What communication mediums do your constituents prefer? How frequently do they like to be communicated with?
4. **Check the source.** How did your constituents hear about your organization in the first place? What inspired them to get involved?
5. **Check inspiration.** What are your constituents getting out of supporting your mission? What motivates him/her to stay involved?

Throw all of these answers up on a white board and see if there are any common threads. From these common threads, can the constituents be grouped in any way? Can this be scaled to other segments of your constituent base?

Now that we can segment and scale a bit, let's talk about how to engage those donors.

Bonus: Just for you, we've included the Engagement Checklist, a quick little guide to run through and discover where you're doing well or have places to improve. Go forth and engage! You'll find the checklist on the next page.

ENGAGEMENT CHECKLIST

Finding similarities in your constituent base allows you to engage your supporters in the right ways. Use this checklist both to start learning more about your supporters and to begin creating your personas.

Check all of the ways your constituents can engage with your organization (any group: donors, volunteers, etc).

- [ ] Volunteer Opportunities
- [ ] Sponsorship Opportunities Events
- [ ] One-time Giving
- [ ] Monthly Giving
- [ ] Blog subscription
- [ ] Email newsletter
- [ ] ____________________
- [ ] ____________________

Take a straw poll: how did your constituents first hear about your organization?

- [ ] Event
- [ ] Friend
- [ ] Social Media
- [ ] Mailing
- [ ] Online search
- [ ] Other

Does this answer differ based on how the constituents engage with your organization? Do you see any patterns?

What inspired your constituents to get involved?

- [ ] Mission statement
- [ ] Personally affected by organization
- [ ] Religious reasons
- [ ] Referral
- [ ] Other

Does this answer differ based on how the constituents engage with your organization? Do you see any patterns?

Why do they continue to support your organization?

- [ ] Mission statement
- [ ] Personally affected by organization
- [ ] Religious reasons
- [ ] Referral
- [ ] Other

Can you group any of your constituents based on this answer? Do these answers deviate from the previous question?

What communication mediums do your donors prefer? *Tip: determine how much revenue you receive per channel.*

- [ ] Email
- [ ] Social Media
- [ ] Print mailings
- [ ] Phone calls
- [ ] Events
- [ ] In-person meetings
- [ ] Other

Do they correlate with any previous groups you've identified?

How often do your donors prefer to be communicated with? *Tip: Compare this with how often your donors actually give.*

- [ ] Weekly
- [ ] Monthly
- [ ] 4x a year
- [ ] 2x a year
- [ ] Yearly

Put all your answers up on a whiteboard to see if you can find common threads. Then use those threads to find new constituents!

CHAPTER 2

Keep me engaged!

Contextual communicating

In the last chapter, we introduced the idea that the “Always Be Closing” concept needs to be replaced with “Always Be Engaging”. Today’s donors are sick of being treated like an ATM, and in a sea of competing organizations and priorities, it’s vital to stay top-of-mind with donors by keeping them engaged.

Some donors reported to researchers at the Society for Nonprofits receiving hundreds of solicitations in a single year!

“But how,” you may ask, “do I keep my donors from feeling fatigued or becoming uninterested?”

Great question!

In response, let’s take a step back and look at customer engagement.

Customer engagement with perceived value

In the for-profit sector, customer engagement has been defined as the emotional connection between the customer and the brand. Gallup says that customer engagement techniques are the “types of emotional connections that drive long-term profits and loyalty.” The for-profit sector – specifically businesses centered on maintaining subscribers or attracting return customers – is constantly focused on what it takes to maintain a sense of perceived value by the customer, and the perceived value "depends on the product's [or service's] ability to satisfy his or her needs or requirements."

> "A company's job is to maintain a sense that their product or service fulfills the requirements of the purchaser."

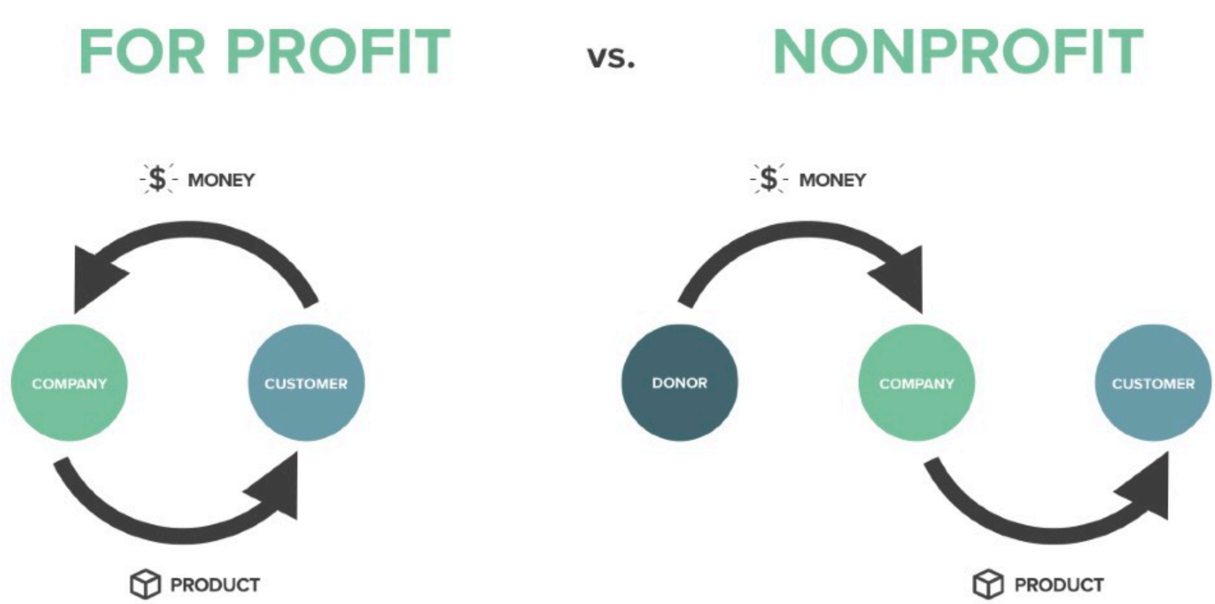
That's a lot of detail – let's break it down a bit. Here's how that translates:

A company's job is to maintain a sense that their product or service fulfills the requirements of the purchaser. A great example of this is a subscription-based business like Dollar Shave Club, who is building a customer experience aimed at keeping subscribers. This is extremely effective marketing – and we can prove it here, and here.

So what does this mean for you, a nonprofit organization?

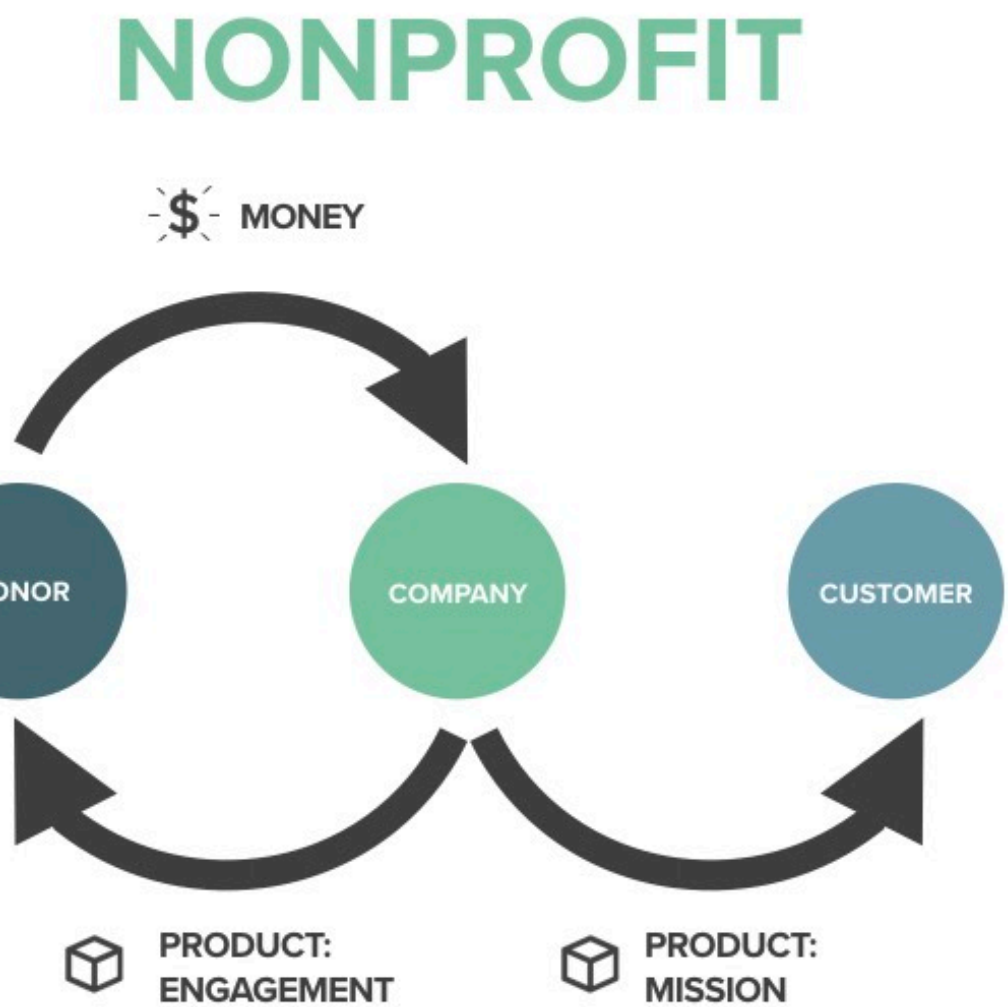
Well, aren't organizations constantly trying to keep from losing return donors, volunteers, board members, and staff? Maintain a sense of perceived value for these constituents to maintain an interest in your mission. Below is a graph that may look very familiar, depicting the difference between a for-profit and nonprofit business as the separation between the donor and the end recipient of the product (who your mission is serving).

This graphic depicts a very broken and outdated analogy.



Instead, organizations need to focus on both delivering value through our mission as well as delivering value back to constituents. This “product” to the donor will come in the form of engagement.

You can see it a bit easier in the updated graph below.



Changing directions

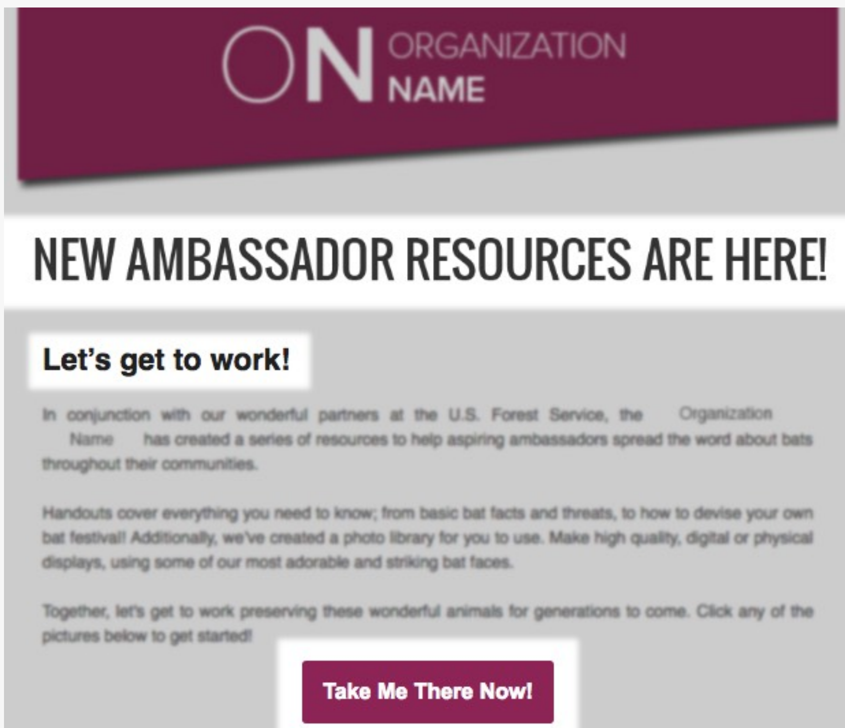
That all sounds good…but how are nonprofits supposed to accomplish that?

Keep donors engaged by building emotional connections. Feed into the motivations that got your constituent involved in the first place. Instead of selling products to donors and volunteers, you're selling a sense of belonging to the mission. A sense of doing something good; a sense of progress; a sense of filling a need. It's your role as a nonprofit leader to not only solicit your constituents, but also give back to them through engagement.

Appropriate engagement opportunities need to be presented to constituents based on their interests and prior engagements.

Let's look at an example from the real world.

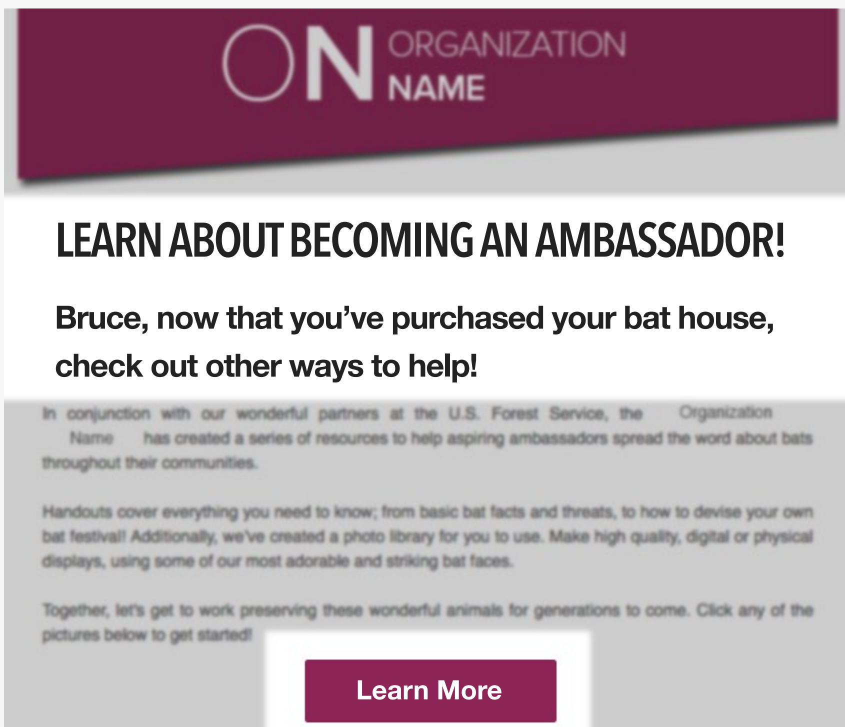
Below is an email from an anonymized organization, that focuses on the preservation of bats. This email was sent after purchasing a bat house from their webstore. To note: the purchaser had never interacted with the organization before purchasing from their webstore, and had not interacted with them at all prior to receiving this email.



First off, let's highlight their efforts: the organization is attempting to keep the donor engaged right off the bat (no pun intended), by inviting them to become an ambassador. However, there are a few things here that are missed opportunities by not considering this donor's "persona."

1. There is no reference to what being an Ambassador actually means. The donor may be interested in becoming an Ambassador, but now they have already labeled the recipient as one without any context.
2. They are soliciting to “get to work” when all that has been done is the purchase of a bat house. At this point, the purchaser doesn’t even know much about the organization. The only thing that has occurred so far has been a purchase/donation.
3. This email is not long, but because it’s so impersonal, it doesn’t warrant inspiration to click on the call-to-action. There is very little contextual relevance to the ask.

Let’s look at another way of presenting this email in the same scenario (a new purchaser/donor).



1. The donor is brand new, and likely doesn’t know what an Ambassador is, so the organization is introducing something new to the reader in the header.
2. This small personalization of adding a first name and acknowledging prior engagement gives context. Following context, the org can then appropriately introduce what could be a next step.

3. Since there is now more context, the call-to-action is more inviting and appropriate – “Learn More’ is very approachable.

These small changes can make a big difference. Changing the perspective of how your org communicates is hard – especially when bringing this mentality to all your constituent communications. But the payoff is huge, keeping donors engaged, resulting in more donations over their lifetime.

Context is – as we’ve just explored – obviously an integral piece to properly communicating with constituents. But how do you know a constituent’s context aside from their interaction with your org? If you’re on the edge of your seat, don’t worry – you don’t have to wait for next season. We’ll tell you in the following chapter.

CHAPTER 3

Who are you?

Stage-based versus persona-based communication

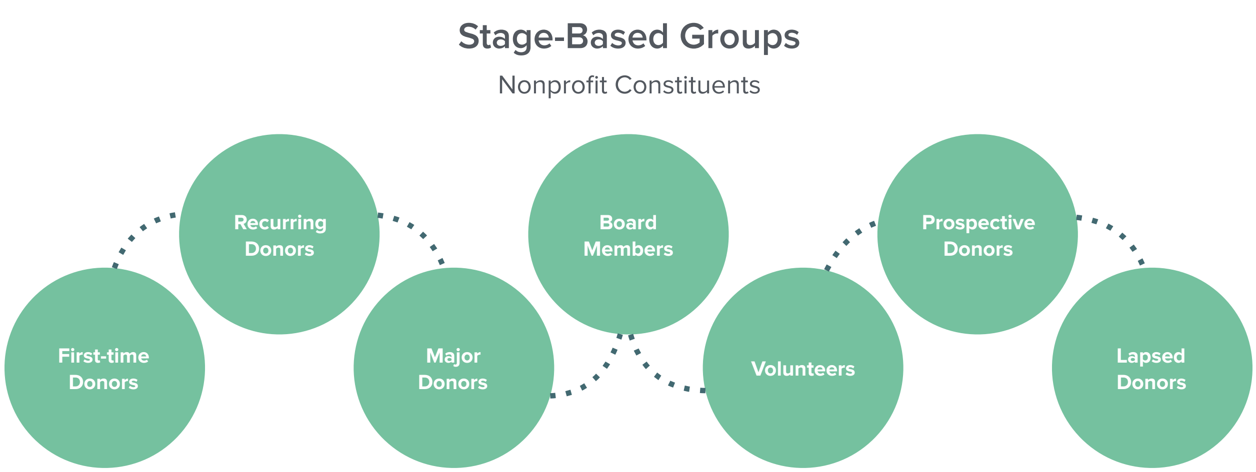
Now that we've explored the importance of presenting engagement opportunities to your constituent base as "products," the next logical next question is: "How do I present the *appropriate* engagement opportunities to my constituents?"

The Science of Building Better Buyer Personas

Before we answer that question, it's important to look at how you may currently be segmenting and talking to your donors.

Stage-based groups

Many organizations currently break their constituent base into Stage-Based Groups: groups defined by the stage a constituent is on in the midst of a timeline. For example, groups could be defined like this:



Your organization may create a workflow based on communicating to these constituents when they enter a group (e.g. make their first donation). Likewise, you may send out a mass-communication to all people who have previously volunteered about an upcoming opportunity.

While this is not necessarily wrong to do, we think there's a better way.

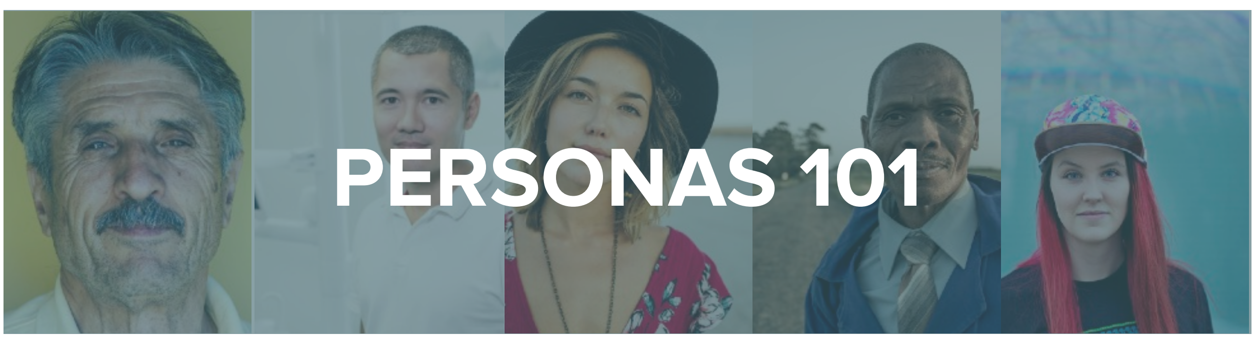
Group constituents based on Personas.

Hubspot found that "using personas made websites 2-5x more effective and easier to use." Behavior-targeted ads were twice as effective, and persona-based emails drive 18x more revenue than broadcast emails.

The results are pretty staggering. With such great outcomes, it's important we break down what a persona is and how to refine it. Doing so could be your next amazing step toward successful marketing.

We'll walk you through our very own course on getting your personas up-and-running, and how to effectively communicate to these groups.

Get ready for class! No textbooks necessary (but there might be a pop-quiz).



What is a Persona?

A persona is a semi-fictional representation of a constituent type. Based on their relationship with your organization, a persona's identity is supplemented by real data about how these people get involved.

Each time a constituent engages with your nonprofit, or you engage with them, there is a treasure trove of data that can be learned about them. By collecting data and investigating its trends, these semi-fictional representations can be developed and refined. This will directly determine how to engage with personas and that persona's group.

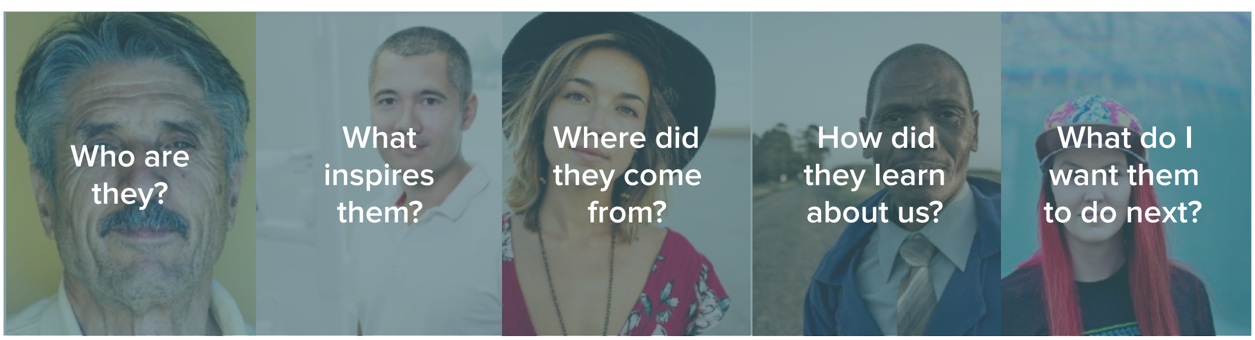
To build personas, basic demographic questions need to be asked to narrow down this category of constituent. Finding out what inspires a certain persona, how they like to engage, how they like to be engaged with, what they are interested in, how they learned about you, and more.

Below are some examples of questions to help you build out personas.

For each organization, some questions will be more relevant than others. Take some time to come up with demographic questions that you feel are most valuable. Use the questions above as a starting point, but try to delve even deeper in each category. From this, can you find commonalities in the answers? Can they be grouped? If so, try putting a face and a name to the persona – you may find this to be even more helpful!

Once personas are created and defined, you can begin to understand how develop engagement points to a persona group that will be more appropriately aligned with them as an individual.

With this broader understanding of what a persona is, we'll take a deeper look on the importance of using persona-based marketing in the next chapter. Stand up, stretch the hammies, and get ready for the last chapter. It's gonna' be good!



CHAPTER 4

You Should Know Who Your Friends Are

Persona-based constituent engagement

We've covered why classifying people into personas instead of stage-based groups can bring more appropriate and contextual communication. But why does this matter for donors? After all, they just need to donate…the end, right? What's the big deal?

How Make-A-Wish is Telling New Stories with Audience Personas

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Golf and friends

If I receive an invite to a golf outing, but I don't play golf, I may not pay as close attention to this message. Instead, if I'm invited to a next free concert event because I first engaged with the organization at their last free concert, there's a much greater chance of keeping me engaged.

It's important to remember that whenever you're participating in mass communication, you're still just communicating with individuals in a particular time and place. If this communication isn't relevant to that individual, it's just noise.

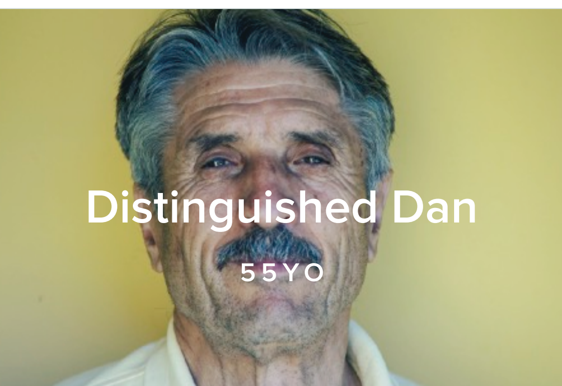
Think about how many messages you filter out every day because it's not relevant. The more personalized a communication can get, the better the chances of meeting constituents with relevant engagement opportunities, which will ultimately create higher engagement and more donor participation.

Constituent engagement is a lot like a friendship. A healthy friendship consists of listening and giving, not just asking and taking. When you get the privilege of meeting new constituents, you need to listen and give. You should be asking why he/she is interested in getting involved, how they want to engage, how they like being communicated to, and more.

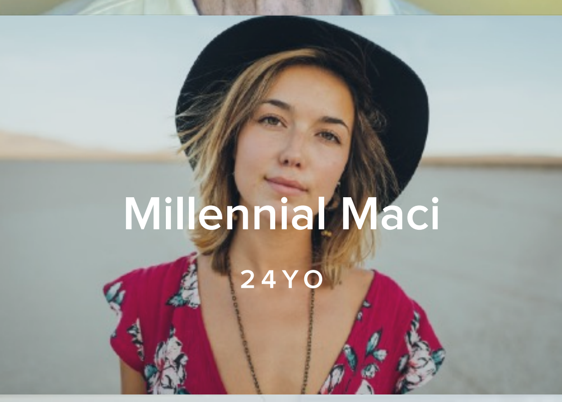
These methods are in stark contrast to the common practice of dropping him/her into a group and put on a path of mass communication.

Example: First Time Donors

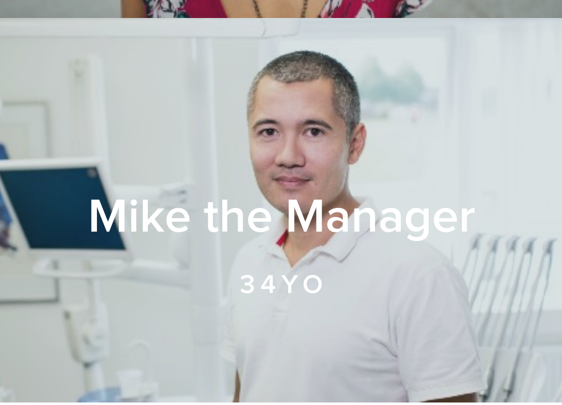
Let's take a look at three people who just gave to your organization for the first time. Let's meet Distinguished Dan, Millennial Maci, and Mike the Manager. In many organizations, when a first-time donor gives, they are dropped into a development cultivation plan to keep these donors giving. However, if we look at these three constituents for what they are – very different types of people – we can see that we need to engage them in different ways.



- Nearing retirement, on the tail end of a successful career
- Still reads the Wall Street Journal, and watches the news every night on TV
- Approached for gifts regularly and has to be picky
- Likes giving a small gift to an org before considering a larger gift
- You can find him on the golf course on the weekend



- She's relatively new to the workforce, but isn't right out of college
- A friend shared a video post on Facebook
- She considers herself as a socially conscious consumer
- She was inspired to give by the impact that $20 could have
- Maci lives an active lifestyle



- Established career, father of 2 children
- He frequently listens to podcast and reads blogs
- Time and convenience are valuable commodities
- Wants to be a part of something bigger than himself
- Wants to show his children the value of giving

By following up with these new constituents, we can learn a lot of things about them. Dan would be a great person to invite to a golf outing, where Maci may not even own a set of clubs. Maci loves to be active and could be invited to volunteer on the weekend, where Mike seems like he could be engaged with a monthly giving program that gives updates he can share with his children.

Using the knowledge that you have about your personas, you can appropriately create and introduce engagement points to the right people at the right time.

Think about the scores of emails you get on a daily basis. It's very likely the organizations that send the most are the ones you read the least. Point being: touches of contact with constituents is numbered. The more you reach out, the more they begin to be desensitized to asks. However, if you can target what you say, how you say it, and who you say it to, your impact will be drastically increased.

"If you can target what you say, how you say it, and who you say it to, your impact will be drastically increased."

Wrapping Up

It's important to remember that these personas are a semi-fictional representation of constituents within your organization's reach. They're meant to encapsulate a number of donors who are like Dan, Maci, or Mike. It's your job to learn more about these people as they come to you, and find ways to keep them engaged. Building out engagement tracks for each persona type may help your organization more effectively plan for and prepare appropriate engagement points.

Today's organizations have the technology to gather and sort through more data than ever before – and it's time to capitalize on it. Take a look at how Make a Wish America is doing just that, and using persona-based marketing to attract and engage their constituents.

You have this potential. The opportunity to reach out and keep your donors engaged is right at your fingertips. Take advantage of the information you have. As you craft your next communication, think about these personas and watch the engagement soar!

Want to learn how Kindful can help your organization begin to implement persona-based engagement?

Click here to request a demo