

## YOUR CONSTITUENTS DESERVE TO BE HEARD

### A FIVE-STEP PLAN TO ACTIVE LISTENING

These days, I have a lot on my mind. We all do. Sometimes those thoughts and feelings need to come out, but lately my focus has been on listening. Listening one-on-one. Listening to leaders and spokespersons of prominent groups and organizations. Listening to the news. Reading, learning and seeking diverse viewpoints.

Action is important, but listening comes first, which brings me to the point. **Organizations that have been listening all along are better positioned to start acting – now.** Are you doing enough to listen to your constituents and providing venues for them to speak?

I get it – these are challenging times. Many in the sector were already stretched thin before unprecedented change was thrust upon us from every direction. That’s ok. Change can be good and there are positive things happening right now that were unthinkable years - even months - ago. That means that you, and I, and your constituents, have different needs and perspectives than we did months or years ago. If you haven’t proactively engaged in listening, chances are you don’t fully understand those needs.

We cannot be content to tidy our offices, organize our files, and wait for things to settle down before reaching out to our donors, prospects, and friends. If family is important to you, do you wait until things settle down before reaching out? Or worry that you don’t want to bother them with all that is currently happening? No, you pick up the phone and check in to see how they’re doing. Chances are, they’d love to know you’re thinking about them and that you care. Your donors are no different, and if you aren’t treating donors like family, I’d suggest you start now.

Understanding your donor’s current needs, feelings and experiences is essential. This is especially true when seeking major and transformational gifts. The best way to show you care is through a personal connection. If you’re in an organization that values relationship-driven fundraising, hopefully you already know what your donors are thinking and feeling because you’ve been in touch recently and consistently. If you’re in a position or organization that relies more on engaging groups of donors rather than individuals, there are still ways to show you’re listening.

#### **1 Learn and respect your donor’s communication preferences**

Know your audience. Some constituents are happy to communicate through text while others may find texting impersonal. How do you learn someone’s communication preferences? You can start by observing how they act.

- When was the last time they answered your phone-a-thon call?
- Did they give in response to your last direct mail appeal?
- What’s their open rate on your email communications?
- Do they like your posts on social media?

If you don’t have a long history with the donor, or your records are spotty, then ask. Fundraisers know better than anyone that it’s amazing what people will tell you if you ask. Periodic surveying is an important but often overlooked tool for keeping a pulse on your constituents. You can start with a focus on learning communications preferences.

## 2 Build systems for tracking what you hear

Maybe the only thing worse than not listening is listening but behaving in a way that suggests that we didn't "hear" someone. If we can't build a personal relationship with every donor, the least we can do is observe, record and honor donor preferences.

- Are you tracking communications preferences and segmenting messaging accordingly?
- What about event attendance?
- Can you record social media activity in your CRM?

Your donors have been sending you messages all along. Chances are, if you weren't tracking these important data points, it may appear to your donors that you haven't been listening.

## 3 Analyze the data you already have to determine what is actionable

If you combine the data points above with giving and biographical information, deliberate analysis will provide you with valuable intelligence to drive your strategy. You can dig deeper by conducting a wealth screening, consumer behavior analysis, or even developing artificial intelligence models, but chances are, there are plenty of lessons to be learned from whatever data points you already have.

Analyze historical data to uncover trends and predictors.

- What roles do age, gender, and geography play in giving to your organization?
- Can you identify the best major gift prospects based on giving consistency, affluence, or programmatic interest?

## 4 Supplement what you already know through outside resources and partners

The opportunities for learning about your constituents are nearly endless.

- Want to find the most grateful constituents in your database? You can couple existing organizational data with machine learning to uncover who is most likely to give through artificial intelligence.
- Wonder how much a donor might be willing to give? Wealth and philanthropic screening can identify not only the capacity of a donor to give, but also important indicators that demonstrate philanthropic behaviors.

## 5 Build your strategies, and your structures, accordingly

If you've done your homework, you can start acting with confidence. Communicate with your constituents the way they prefer, either on an individual level or through strategic segmentation. Ask them to support the areas they're most passionate about. Know if and when to make additional appeals to increase support and connection. And don't stop there.

One of the beautiful, and maddening, things about regular analysis is that it forces you to ask more questions and think bigger-picture. This means you start reallocating resources to the areas of greatest promise and matching staff capabilities and strengths to the right organizational functions. In doing so, you can make a more meaningful and joyful experience for both your donors and your team.

Listening is important.

**Listening alone won't fully show your constituents that you care. Start today, work in small increments, and always be thoughtful in showing you're not only listening but also prepared to act on what you're hearing.**



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*Michael is here to help you cut through the noise and determine where to start. When he's not busy listening and learning, you might find him getting some fresh air on the trail, listening to records, or honing his very amateur woodworking skills.*