INTEGRATION

**Attract, Retain and Mobilise:
The Power of Unified Supporter
Engagement**

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Bringing together the tools, systems and platforms that you use to run any organisation will help your team **break down productivity barriers, become more efficient and empower you to deliver more impactful, effective work.** Thats so important in the charity sector; every extra pound raised, every hour saved and every moment you're not thinking about your systems, you're freed to do more good, transform more lives and help make the world a better place.

Unified platforms and stable integrations can potentially **save you and your team hundreds of hours on manual processes every month**. That sounds like a bold claim, right? But at NDP studio we've helped public and private sector organisations do just that - now we're working with the charity sector to help transform the way you use technology to do good.

> *"If you've got these systems and they're not all fully integrated, then you've got an issue: you're not going to squeeze the most out of them."*

At the end of 2022, we conducted a survey with charity sector organisations, learning about their different experiences using technology platforms. From this, **we discovered just how much time was being saved by charities who used**

integrated technology stacks and unified digital platforms, and just how much time was being wasted by charities using disjointed, disconnected technology solutions. We saw a huge opportunity to help make good causes more efficient and more effective.

Another key learning was how siloed some organisations were, and how moving to platforms and systems that were joined up, open and accessible pulled together people, teams and whole organisations. **Using unified and integrated systems increases the return on the investment that you've made on these different systems, because all of a sudden the tools you use, the insight you generate and the supporters you engage aren't siloed off into the team who has the access.**

When everyone is able to get access to the exact information they need all in one place, a unified platform, or integrated set of platforms, enables teams, leaders and project groups to better access the rich data, that's the life-blood of your organisation.

Working with charities like RNID, where we're integrating their unified digital platform with Microsoft Dynamics, we've seen these pain points firsthand and the impact you can deliver when you address them head on. **At the end of the day, bringing your systems together helps any organisation achieve their unique missions and goals** - here, it can help you do more good in a world that desperately needs it!

And after charities standardise their processes through unified platforms and integrations, what does it feel like for leadership teams and the people they lead? **It really is quite freeing.**

Adam Dustagheer

THE TIME IS NOW

It's hard to remember a time when efficiency, effectiveness and insight-led decision making has been more important in the charity sector than it is today.

With inflation driving costs up, 55% of people saying that their financial situation is making it more challenging to donate[1] and house prices falling at their fastest rate in 14 years[2], **its never been more important to invest money where you can be sure it will deliver the greatest impact.**

At the same time, more of our services, engagement activity and fundraising actions are delivered online than ever before. To use your digital channels effectively timeliness, personalisation and agility are vital, but these are key challenges as charities struggle with disparate systems, slow processes and a lack of integration between platforms, tools and teams.

"You want best-in-class systems that you can pull together - I think that's where we're seeing the world going"

Adam Dustagheer, NDP Studio

To get the most out of your audience, the teams driving you forward and the resources spent creating new ways to deliver impact, **connecting the platforms, tools and services you use will save time and money, deliver a better supporter experience and give you the insight you need to grow and flourish.**

[1]NCVO The Road Ahead 2023: The ongoing impact of cost of living
[2]Halifax House Price Index November 2022

Useful Definitions

Point Solutions

Point solutions are online service providers that offer specific functionality to their users. Common functionality of point solutions include communications needs such as email, text messaging or fundraising capabilities.

Point solution providers often focus on offering one type of service. For example, well known email point solutions include MailChimp and Dot Digital. Each provider may specialise in certain areas of functionality, such as deliverability, options for easy-to-use templates, or email testing.

A key selling point for many point solutions is their ease-of-use. Another of their value propositions is the ease with which users can deploy their services. Another benefit is the affordability of each individual service.

Each point solution will have its own individual reporting, data and technical tools and requirements. Moving supporter data in and out of point solutions is an important consideration when choosing to use a particular platform.

Unified Digital Engagement Platform

Unified digital engagement platforms are online service providers that offer a suite of software functionality to their customers using a software-as-a-service subscription model. Common functionality of these tools might include emails, text messaging, fundraising, peer to peer fundraising, membership, or online advocacy.

Depending on the service's business model, history or mission, the software tools available may differ. When selecting a platform, you will need to carefully determine your needs, and assess the tools that each platform offers.

The strongest benefit of using a unified digital engagement platform is that all the tools and the data they generate are in one platform, offering a seamless, consistent experience to supporters and staff. Supporter data can be used across the platform, enabling you to serve more varied, personal, relevant campaigns to supporters.

Unified digital engagement platforms also offer reporting tools so that users can track the performance of whole programmes over time and a single source of data, making data-flows simpler and less resource-intensive.

Constituent Relationship Management System (CRM)

A Constituent Relationship Management System (CRM) or 'database of record' is a software platform that stores supporter data from across an organisation. Well known examples include Raiser's Edge, Salesforce and Dynamics.

That data can include basic information such as name and address, as well as transaction information from a range of channels. Another key role for a CRM is coding and tagging so that supporters, activities and campaigns can be tracked and exported for analytical or marketing purposes.

For CRMs to be fully functional, transaction information must be imported into them on a regular basis from other platforms. This is often achieved by integrating platforms and tools, allowing data to flow between them with minimal staff effort, while also eliminating the mistakes that are made when data is manually moved between systems.

"Without a unified platform, your supporter journeys won't be tied together. In today's world, supporters expect that; you need to do it."

Josh Rosekilly, Sense.

REFUGE

Unifying your online actions

Agile organisations can transform their engagement, campaigning and fundraising programmes when their tech stack is unified and properly integrated. Refuge, the UK's largest specialist domestic abuse organisation, is the perfect case-in-point.

Always ready to launch campaigns in real-time in response to current events, Refuge has become an unstoppable social advocacy force. **Their unified digital platform has made it easy for Refuge to respond quickly and to raise awareness of their work.**

Being free to work in this way has seen Refuge grow their list by over 6,000% in just 3 years.

According to Beth Mullins, Individual Giving Manager, the organisation's donation pages were complicated, long, and offered a poor user experience before they moved. Low page conversion rates were a recurring issue and form abandonment rates were out of control.

In 2019, the charity switched to a unified digital platform, pulling campaigning, email, and fundraising into a single system that offered better functionality, seamless database integration, versatile page editing features, and a consistent, connected user experience.

"*I was very keen for us to be able to create campaigns - it wasn't something that Refuge had really done before*" said Anna Chowcat, Digital Mobilisation and Engagement Manager.

In 2020 Refuge launched their first campaign: The Naked Threat. This was aimed at criminalising threats to share non-consensual, potentially compromising images of people and ended up **helping change the law in the UK.** *"That campaign was really successful, not only in bringing people into our email list, but also in driving donations"* said Chowcat.

Ever since that first campaign, Refuge has sustained their growth through ongoing advocacy, email, and fundraising campaigns. Combining their agility with a powerful, joined-up set of tools has seen online income and engagement skyrocket. **They began with an active database of 3,000 people, their active list has now surpassed 200,000!**

Mullins was frank about where Refuge would be without their unified digital platform: *"We wouldn't have seen the sort of growth in our email list we have without it."*

> "There's always something happening. We're always trying to optimise - that's always a priority for us. That's how we're able to continue to engage new audiences."

Beth Mullins, Individual Giving Manager, Refuge

WAR ON WANT

Integrating your platforms

War on Want work with partners in the UK and around the world to fight poverty and defend human rights. As War on Want's fundraising and advocacy programmes have developed, **they wanted to create engaging, high quality, multi-channel supporter journeys** to enhance their fundraising, share urgent actions and send rapid response campaigns to help make an impact in the moment.

To achieve this they needed to work in more agile ways, with **data flowing between their digital engagement platform and CRM system seamlessly, while automating many of the manual processes their Database Team had been performing.** Through this they believed they could create a more effective programme, creating greater impact while using staff more efficiently.

To facilitate this they switched CRM, migrating to a customised version of Salesforce, that has been designed for charities.

By integrating their unified digital engagement platform and their CRM system, War on Want were able move data between the two in real-time. This allowed them to map contacts and transactions across their systems, with automations powering the journeys supporters go on.

Through this close integration between their systems, War on Want are also able to create more personalised content for their supporters, creating tailored communications and building supporter profiles based on the data they collect, which can help organisations choose the kinds of content and campaigns to send to groups of supporters.

With actions and transactions being mapped across systems, War on Want also have **up-to-date reports and business intelligence, allowing them to make decisions and react to the performance of their campaigns in real time**; unlocking agile working.

Powered by the integrations between their platforms, **War on Want are in growth mode; their mailing list doubled in the year following them integrating their platforms**, and now they're working to turn this growth into campaign success and new income.

"We're working more efficiently, more accurately and a with a better understanding of our audience..."

Tom Barns, Director of Income & Engagement, War on Want

"Having an integrated, unified platform enables us to layer in new ways of understanding supporters."

Josh Rosekilly, Insights Manager, Sense.

Sense
Accessing the information you need

Building and maintaining relationships with the different groups of supporters is hard work. It can be easy to forget that your supporters are real people behind the screen. **How can your team acquire a more holistic view of your community while remaining productive?**

The national disability charity Sense found their answer in an integrated, unified digital platform. It has **provided them with an understanding of the diverse range of people they engage, and with the tools they need to deepen that engagement.** By further integrating their platform with the business intelligence tool Microsoft Power BI, they are also able to visualise their audience, develop a sophisticated overview of their activity and provide insights to their teams and senior leaders, helping better inform their future strategies.

Looking for the most *sensible* solution, Sense were drawn to a unified digital platform because it was flexible, could integrate into their Raiser's Edge CRM, and could centralise all the data sets from their digital tools within a single accessible location. This has made their approach to digital engagement easier to carry out - no matter its level of complexity.

Profoundly, moving to a unified digital platform has underscored the fact that support comes in all different shapes and sizes. James Dungate, Head of Engagement Operations and Josh Rosekilly, Insights Manager, remarked on how pulling together their platforms has given them the ability to **put the right ask in front of the right supporter at the right time**.

For example, the cost of living crisis has put a strain on how much money people can give, for that reason frequent financial asks may not be appropriate for every supporter. With their platform, **Sense can automatically vary the content supporters receive based on their activity or profile.** *"Someone might still absolutely want to support you in every way they can, but the wrong ask at the wrong time will switch them off. Being able to use our tools to apply segmentations and integrate demographic information is crucial"* says Rosekilly.

For those who can't afford to donate, Sense can send alternative asks such as calls to sign petitions, volunteer or attend events. **Through this more holistic understanding of their supporters Sense are delivering against their core strategy**, engaging and supporting more people than ever before.

"The platform and the agency that we partnered with made it really easy to daisy-chain different asks and actions. The potential is massive."

Anna Chowcat, Refuge.

THE IMPACT

With all the challenges facing today's civil society, **you have to be able to deliver more impact with lower budgets and limited resources.**

By integrating the systems you use and using unified digital platforms, you can empower your teams to spend more time focusing on what really matters; delivering your mission and making the world a better place.

As your data comes together, you can work to better **understand your supporter's experience and work to improve it.** This breaks down the internal silos that can impact them, engaging supporters with a consistent look-and-feel, set of goals and calls-to-action, while ensuring supporters hear about **all the work you do and the impact they help you deliver.**

Communications can be more personalised and responsive, allowing you to quickly react to a supporter's actions in ways that feel appropriate and are designed to deepen their engagement with your cause.

Your organisation can **work more quickly and with the confidence to be more agile** - delivering actions in joined-up ways and with the oversight you need to be confident in the communications you share.

And because you have insight and intelligence generated from across your organisation at your finger-tips, you can **spend your time and energy focusing on what is working, considering your strategy and planning for the future.**

Integrated systems and unified digital platforms not only make your organisation more efficient, but they empower you to create more effective programmes, giving supporters and beneficiaries a better experience, while giving you the insight you need to plan an even better future.

FINDING YOUR BEST FIT

Now that you're thinking about the platforms and tools your organisation use, you can begin to evaluate the benefits of selecting tools that offer a unified approach, closely integrated into your key systems and business processes...

Point Solutions

Category	Description	
Data Infrastructure	We have the capacity to manage or support the integration of multiple data-feeds.	☐
Digital platform management	We have the resources to manage processes across multiple distinct platforms.	☐
Supporter experience	We are comfortable with our user experience and brand changing across platforms.	☐
Feature Sets	We'd like to shop around for specific feature sets from each platform.	☐
CRM Integration	We are happy to integrate multiple point solutions with our CRM, or to manually move data around.	☐
Campaign analytics	Audience behavior can be tracked in each platform and pulled together when needed.	☐
Reporting	We're happy to aggregate reporting across platforms, using staff to pull reports together.	☐
Getting help	We work with multiple support teams and can fix cross-platform issues ourselves.	☐
Managing suppliers	We can manage lots of relationships, contracts, and governance requirements in teams.	☐
	TOTAL:	☐

Unified Platforms

Category	Description	
Data Infrastructure	We're looking to simplify and streamline our data infrastructure	☐
Digital platform management	We want to manage all our digital tools in one place with a single user interface.	☐
Supporter experience	We want a unified brand and user experience for supporters across all our digital tools.	☐
Feature Sets	We're happy to use more general feature sets used broadly by organisations across the sector.	☐
CRM Integration	We want one integration with our CRM, minimising manual processes.	☐
Campaign analytics	We want consistent information, displayed in one place and available in real-time.	☐
Reporting	We want up-to-date information available in one place and accessible to everyone who needs it.	☐
Getting help	We're looking to work with fewer support teams who can help with a wider range of questions.	☐
Managing suppliers	We'd prefer to have fewer suppliers to manage and fewer governance processes to perform.	☐
	TOTAL:	☐

To talk more about the technology tools
that can power your programme, contact
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