Thank you for taking time to learn more about using the data you collect in Salesforce to develop a data driven engagement strategy.

After this session I hope you will not only understand more about engagement strategy but that you'll see your Salesforce system as more than CRM – you'll view it as an engagement management platform.

What is Engagement Strategy?

A ***strategy*** is a framework for making decisions about how to achieve goals.

Engagement is the ongoing interaction
between an individual and an organization in exchange for meaningful value.

Engagement strategy is the framework that guides you in building
relationships that deliver value to the people who help you achieve your goals.

Sometimes Engagement Strategy is understood as "marketing tactics" – writing appeals, creating brochures, sending emails. It is actually a full strategic framework that starts with a clear Vision and **guides** decisions about program design, fundraising messages, volunteer outreach… everything where an organization is inviting a constituent to participate.

You want to engage your constituents no matter the role they are playing (participant, donor, volunteer) AND you need to engage them underlined differently.

Nonprofits are familiar with being strategic when it comes to fundraising and cultivating major donors – that is what we know as Moves Management. I am suggesting that we apply this same strategic approach to engaging *all* constituents no matter the role they play.
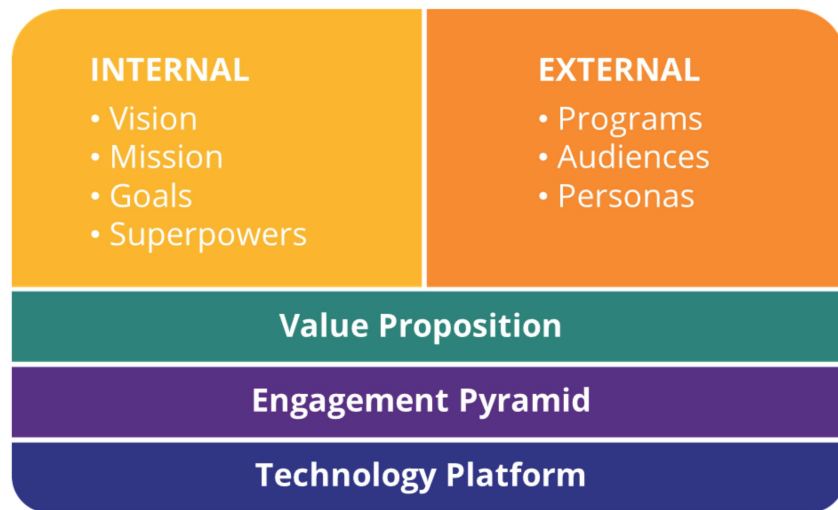
The INTERNALLY focused Components help you **understand**:
1. **what** you are **trying to do**, and
2. **what makes you unique**

The EXTERNALLY-focused Components help you **understand**:
1. What you want to offer so people outside your organization can participate in your mission
2. who you want and need **to engage in your programs** to achieve your Vision, Mission and Goals, AND
3. what makes them tick

Connecting the two sides we have the Value Proposition, Engagement Pyramid and Technology
- Your value proposition is how you communicate your superpowers and the value you offer each Persona.

- The engagement pyramid is the measurement framework

- and the underlying Technology Platform tracks and supports it all
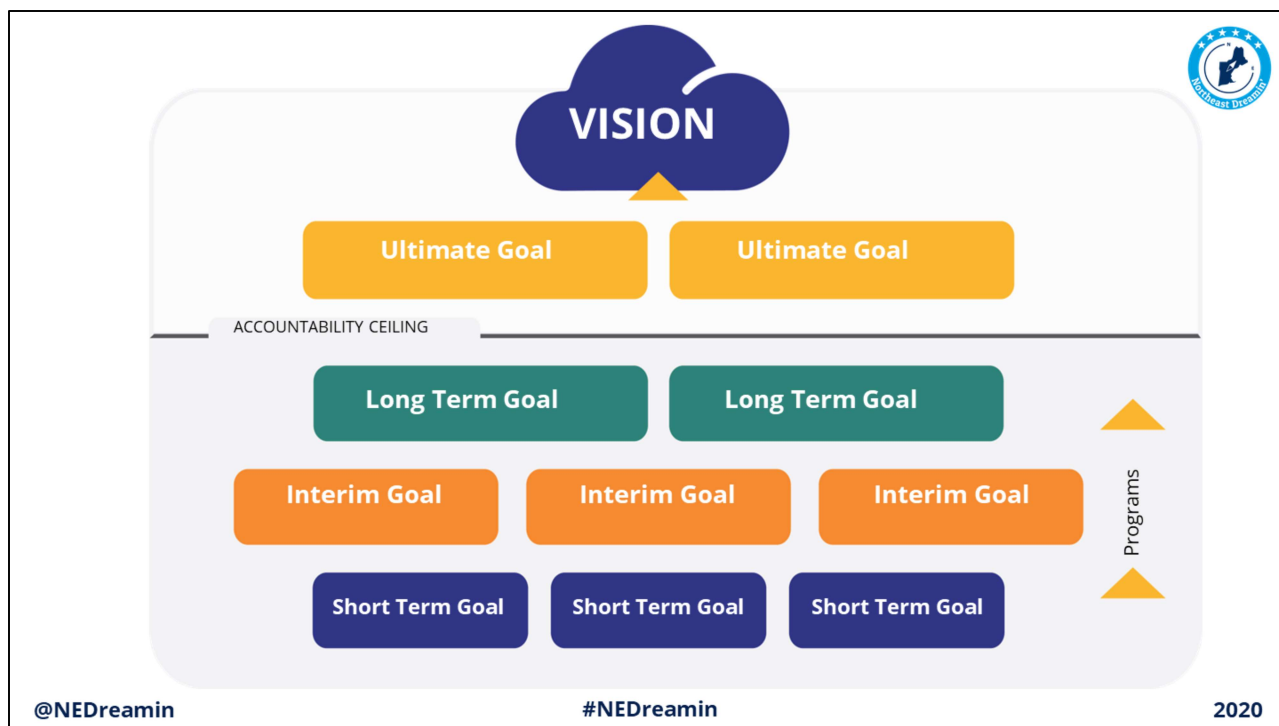
Here is another way of looking at it.

Your Vision is a lofty, aspirational outcome of your mission work **AND** the work of others. That is why the "ultimate goals" are above the 'accountability ceiling'. All that means is that your organization cannot single-handedly achieve those goals.

However, there are many goals you **can** achieve. Those are below the accountability ceiling. This is where you say – "within our mission we are going to do a certain type of work or provide certain services (depicted here as "programs"), and all of our work will be designed to help us achieve these specific goals over time."

Engagement strategy takes this further by saying that you will **engage others** in your mission through these programs. Therefore, you also need to design your programs and services in a way that delivers value to members of your audience (those personas we mentioned!).
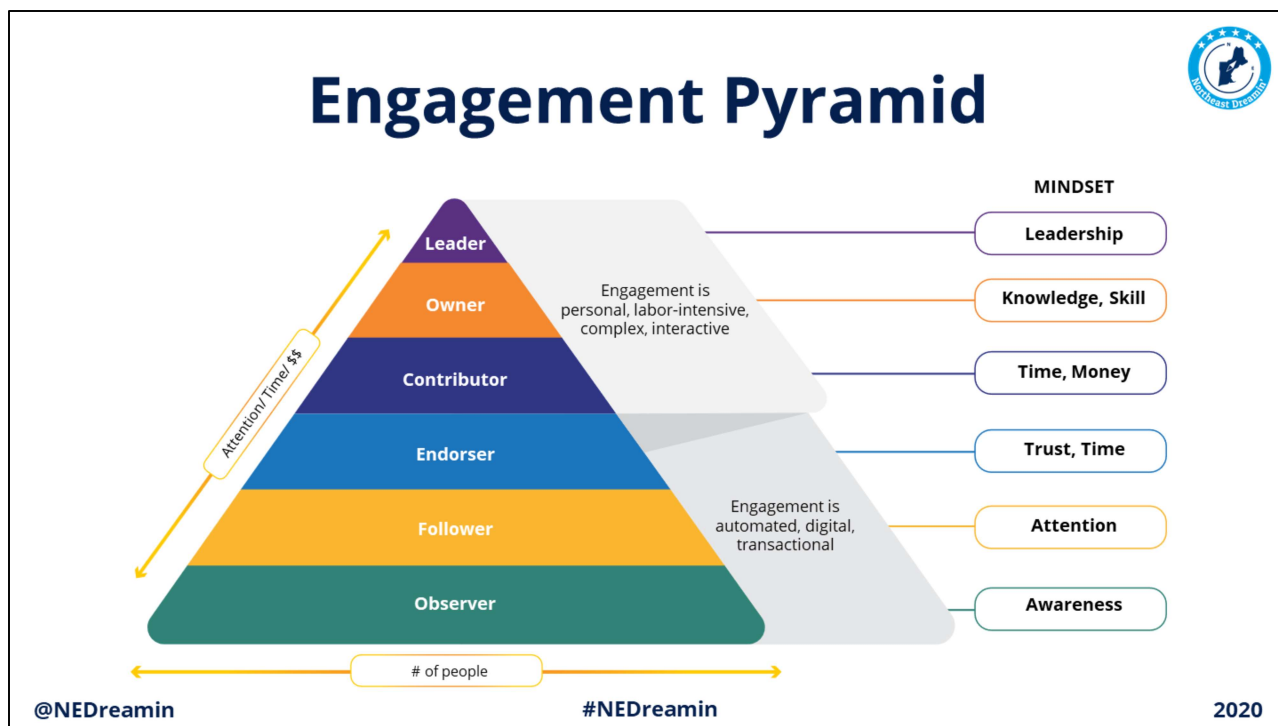
The pyramid shape is important, more so than a ladder or a funnel - it most accurately depicts the need for a wide base we can draw on to fulfill increasingly demanding roles. Remember, this is not about weeding people out and it is not necessarily a linear path – it is about measuring the level of engagement of each constituent in helping you achieve your goals and the relative value that engagement contributes to your mission.

Each level has a label that describes increasing engagement
- The shape shows us a different number of people is expected at each level (wide base, strong middle…)
- The 'mindset' chart shows us how constituents are thinking and what they're willing to contribute at different levels
- And on the right side we see how your organization outreach needs to differ between lower and higher levels of engagement

An important takeaway here is having a strong middle - making sure you OFFER OPPORTUNITIES AT EVERY LEVEL so people who wish to get more involved *can*

You want to be sure you aren't losing those Followers who are paying attention. Similarly, you want to be sure you aren't asking an Endorser to make the leap all the way to Leader – that could be overwhelming or feel imposing. Thus the need for an engagement strategy – it helps you design constituent journeys that offer opportunities at every level and that meet your constituents where they're at.
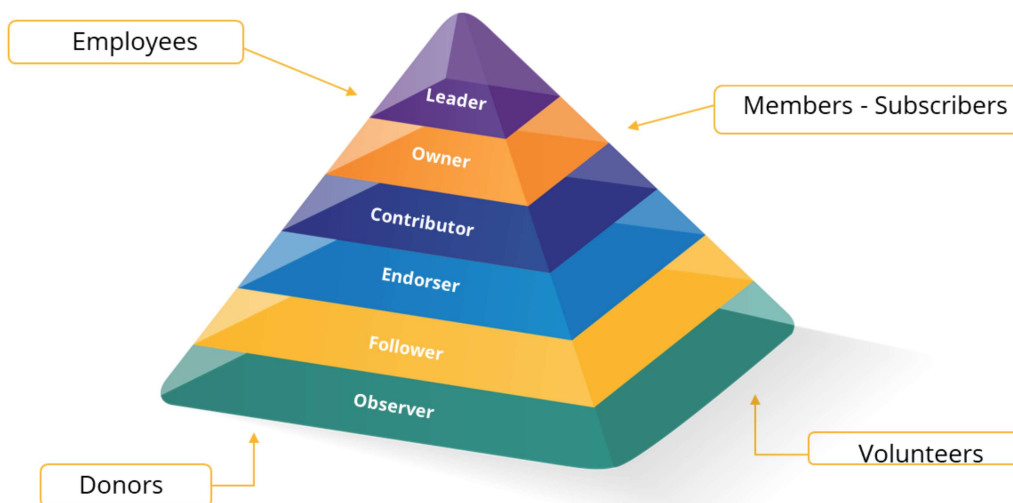
I am often asked if we should create different pyramids for different audiences. The fact is – while constituents play many different roles, we have only one pyramid. We reflect this multi-facted engagement with a 3-dimensional pyramid. (and for the record, we show 4 sides here but there are as many as you the roles you have to offer)

We take on different ROLES when we engage – sometimes we play the donor by making a financial gift, sometimes we play the volunteer when we contribute our time.

Depending on the specific action we take while in those roles we might stay at the same level or we may move up, back down and around. Ultimately the actions and associated levels are determined by you as you define your strategy. More on that soon.

Ex: We talked about moves management earlier - Moves Mgt is a strategy and I suggested it is only one channel, or pathway, within an overall engagement strategy.

Moves Management focuses on the role of a DONOR and the journey to becoming a major donor. The journey passes through increasing levels of engagement; e.g., from the first-time gift to

participation in special events to Making a major gift

The constituent who becomes a major donor by your definition is likely considered

at least a Contributor on this pyramid. At the same time, **they may also be engaging in other ways:** they may volunteer or even serve on your board. With engagement strategy – we measure all those interactions.

Their **overall highest level of engagement** is where you would track them: the donor interaction places them as a **Contributor,** the Volunteer activity may fall at the **Endorser** level, and serving on the Board places them at the Leader level. **ALL OF THIS combined places them as a 'Leader'.**

When their Board term ends if they continue making major gifts, their engagement level will drop to Contributor unless you offer new ways for them to stay more highly engaged.
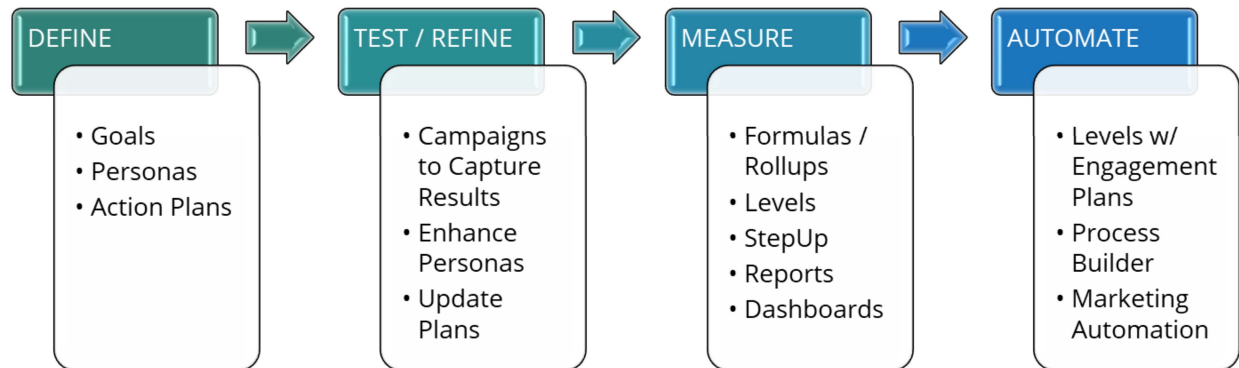
While it is very tempting to jump into Salesforce and start configuring and reconfiguring, we aren't quite there. When we start with technology we may feel forced to work the way the system works. The system should work for us - not the other way around.

1. Set goals
2. Design activities to achieve the goals
3. Test your plans (run those activities and evaluate results)
4. Measure the engagement
5. Automate proven processes

Let's start with PERSONAS

We can capture data that represent key attributes of a Persona. We haven't actually gone through training on how to develop a Persona so this is high level and focused on basic demographics and interests.

When you design campaigns with Personas and Goals in mind you are more likely to be successful.
Not only can Salesforce Campaigns show you the results of the campaign itself – Responses, and 'Won Opps' – we can use Campaigns to measure constituent engagement.

For this objective, you need to have determined a value – or engagement level - for the Campaign. Some activities we offer require low engagement. Others ask for more. All of them are important because, if you recall the pyramid, we want to engage our constituents at all levels and meet them where they're at ...while always offering more.

In this example – we have a VIP Breakfast.
 > The target would likely be people already at a mid to high level of engagement.
 > You can imagine that this Campaign is set up such that when a gift is Closed-Won, a campaign member is created or updated with a status set to 'responded'.
 > That participation places the constituent at the Owner level of engagement. (in our pyramid example that is the 2nd highest level)

How do we get the information from the Campaign level to the Contact level? Let's take a look at some tools that help us do just that.

Tools at all Levels

pun intended ☺

Salesforce/NPSP

✓ **Formula Fields**

✓ **Rollup Summaries**

✓ **DLRS**

✓ **Levels (NPSP)**

Apps

✓ **StepUp***

Advanced

✓ **Einstein Analytics**

✓ **Tableau**

*StepUp is an app available from Percolator Consulting

Example Formula Field

Donor Eng Calc

/*Calculates Donor Engagement Score based on giving */

/*Score given based on number of gifts last 5 years. Customizable rollup tool calculates number gifts last 5 years*/

IF(Number_of_Gifts_Last_5_Years__c > 4, 10,
IF(AND(Number_of_Gifts_Last_5_Years__c > 1, Number_of_Gifts_Last_5_Years__c < 5),7,
IF(Number_of_Gifts_Last_5_Years__c = 1, 1,0)))+

/* Add to that score given based on total gifts this year + last year */

IF((npo02__OppAmountLastYear__c + npo02__OppAmountThisYear__c) > 10000, 18,
IF(AND((npo02__OppAmountLastYear__c + npo02__OppAmountThisYear__c) > 2000,
(npo02__OppAmountLastYear__c + npo02__OppAmountThisYear__c) < 10001),13,
IF(AND((npo02__OppAmountLastYear__c + npo02__OppAmountThisYear__c) > 499,
(npo02__OppAmountLastYear__c + npo02__OppAmountThisYear__c) < 2001),10,0)))

This is a sample formula field to calculate Donor Level. Keeping in mind that engagement is ongoing, we factor in FREQUENCY and RECENCY along with AMOUNT. Specifically, we can see value is given to
- Number of Gifts in Last 5 Years
  AND
- The SUM of Total $s This Year + Total $s Last Year

This is only an example of what is possible using Customizable Rollups along with the out-of-the-box NPSP Rollups. Now, we use this field with Levels.

In this example, you can see I set up NPSP Levels according to a moves management strategy looking to increase *donor* engagement. The points earned for the actions just described are assigned a Donor Level.

Contact Donor Level ▼ 📌

16 items · Sorted by Donor Eng Calc · Filtered by my contacts - Donor Eng Calc · Updated a few seconds ago

		Name	Donor Level	Donor Eng Calc ↓	Total Gifts This Ye...	Total Gifts Last ...	Number of Gifts Last 5 ...
1	☐	Rita Velvet	Major Donor	23	$5,000.00	$4,050.00	5
2	☐	Peter Piper	Major Donor	20	$5,000.00	$500.00	2
3	☐	Jack Bean	Major Donor	20	$6,000.00	$3,000.00	4
4	☐	Joshua Kadison	Major Donor	20	$7,800.00	$250.00	3
5	☐	Gary Busey	Major Donor	20	$5,000.00	$2,500.00	3
6	☐	Susan Elbow	Major Donor	20	$6,000.00	$0.00	2
7	☐	Michael Jordan	Major Donor Prosp...	17	$0.00	$500.00	2
8	☐	Stephen King	Major Donor Prosp...	14	$6,000.00	$0.00	1
9	☐	Craig English	Major Donor Prosp...	14	$5,000.00	$50.00	1
10	☐	John Mellenca...	Recent Donor	11	$0.00	$500.00	1
11	☐	Tina Turner		7	$0.00	$50.00	3
12	☐	Mary Anne Bean		7	$0.00	$300.00	4
13	☐	Clifford Red		7	$0.00	$250.00	2
14	☐	Peter Frampton		1	$0.00	$200.00	1
15	☐	Diana Ross		1	$0.00	$0.00	1
16	☐	Alan Greenspan		1	$0.00	$180.00	1

Your outreach to move a constituent along is the strategy.
Salesforce supports the strategy by recording transactions, calculating points and assigning the level.

We have heard it repeatedly throughout this conversation – there are many ways constituents engage with your organization.

Here we see examples of engagement at all levels – from subscribing to the e-newsletter to volunteering to donating to being a board member.

Your strategy for reaching out to your constituents and your pyramid determine what level of engagement all of this adds up to. Remember --

➔ What we are looking at is **data** – there are many records in Salesforce that were counted and totaled to arrive at these numbers and dates.

➔ What we want is to **tell a story** with this data.

We want to create journeys and drive engagement. The data can only do that when you have a strategy defined – the engagement strategy is the **guide** for making decisions and building relationships. Because we have a strategy, we knew what information to draw out from our data to help us tell the engagement story.
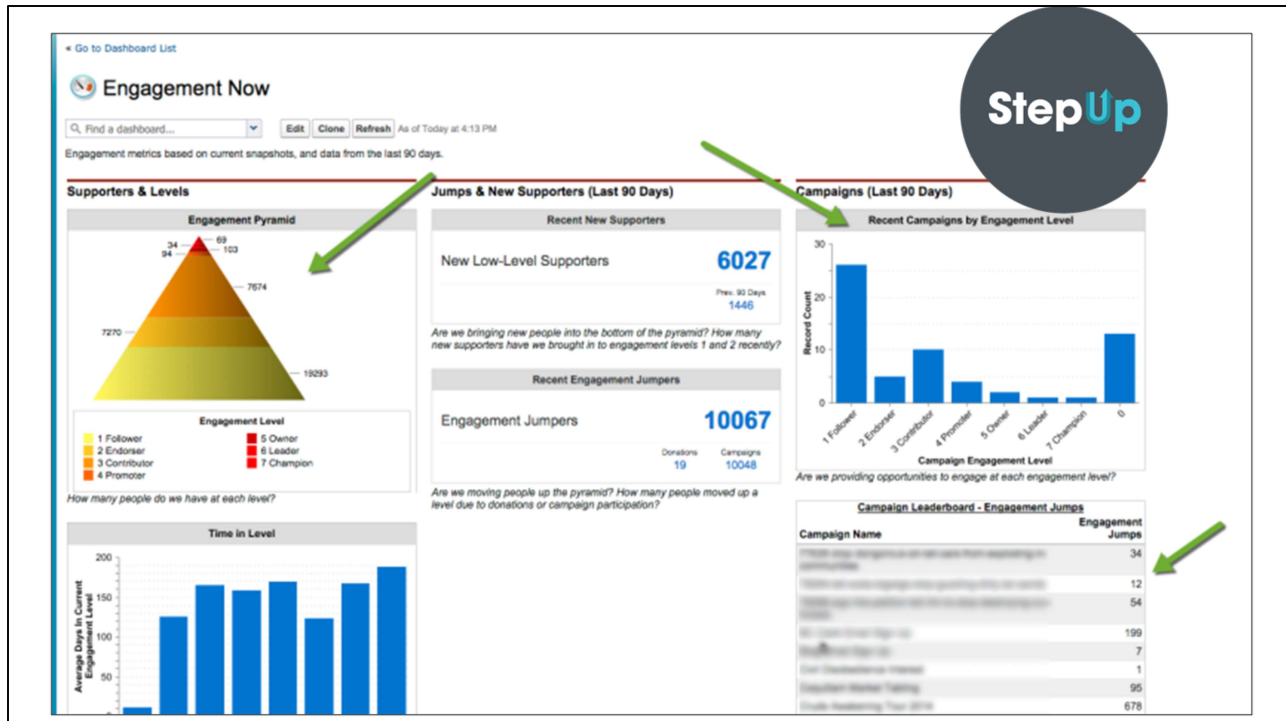
A great option for measuring overall engagement is an App called Step Up. This is an app created by the good folks at Percolator Consulting.
PLEASE NOTE: StepUp is Lightning-ready!! Even though this screenshot shows Classic

StepUp is based on Campaign participation and any field captured on the Contact. It can be configured to calculate engagement levels based on specific actions, without getting into a more complex point-based system. As with any tool, it requires you to have the strategy in place first.

For example, a Campaign Member may achieve the designated level by having Responded to the Campaign or simply by being added to the Campaign. According to your strategy, you configure StepUp to evaluate the date of the campaign, the campaign member status and the campaign engagement level.
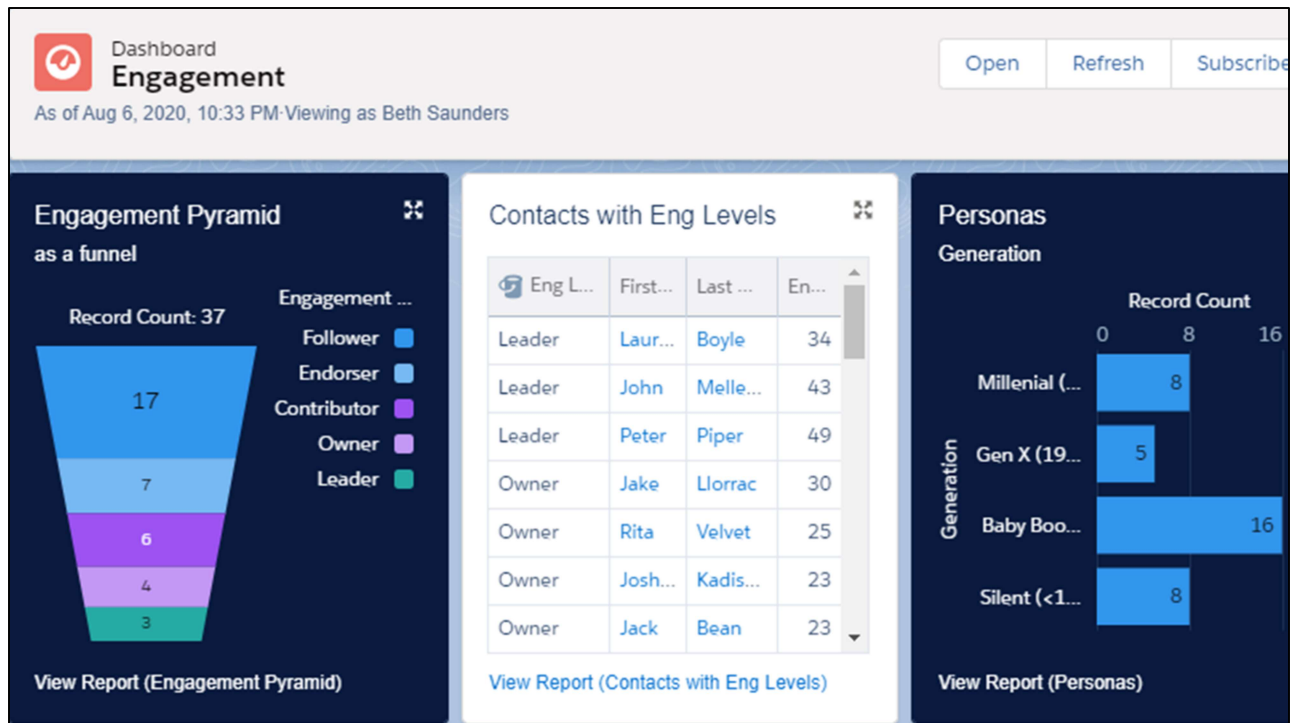
With the strategy defined and the engagement being tracked and measured we can begin to tell stories. These are a few simple Salesforce Dashboards drawing on some of the data we saw throughout the presentation.

Maybe someone wants to put in an Idea to Salesforce to offer a Pyramid shape for dashboards – I had to use the funnel so please use your imaginations and envision this the other way around ;-)

If you use other data visualization tools such as EINSTEIN or TABLEAU you can surely create other dashboard components such as maps and more interesting shapes.

Take Aways

1. Of the many components of engagement strategy, the pyramid is the most important. All the others feed into or support the pyramid.

2. A robust pyramid is all about "the middle." Build out that mid-section!

3. A constituent's journey is winding.

4. Technology is critical to tracking and measuring engagement -- and to a robust, responsive strategy.

5. There are many Salesforce features and Apps that help track and measure engagement - don't be afraid to explore!

No matter which tools you employ the key is to start by designing your strategy.

A clear VISION supported by concrete GOALS that you aim to achieve through your PROGRAMS & SERVICES that deliver VALUE and engage the PERSONAS in your audience are essential for data driven engagement.

The keys are
- ❖ **to MAKE SURE YOU ARE OFFERING OPPORTUNITIES AT EVERY LEVEL so anyone at any level who wishes to get more involved can AND**
- ❖ **to configure Salesforce to track and measure engagement according to your strategy.**

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