



ISOBRO

Anna Hessenbruch

Hvad du måler, får du gjort.

**Sådan kan du måle
engagement.**

Anna Hessenbruch



-
- Head of Engagement and Experience hos Prostate Cancer UK
 - 12 års erfaring i velgørenhedssektoren i London
 - Supporter Experience Committee Lead for *Chartered Institute of Fundraising*
 - Formand for The Supporter Experience Network for for britiske velgørenhedsfagfolk siden 2018
 - Kvinden bag Supporter Engagement Blog medium.com/@supporterengagement

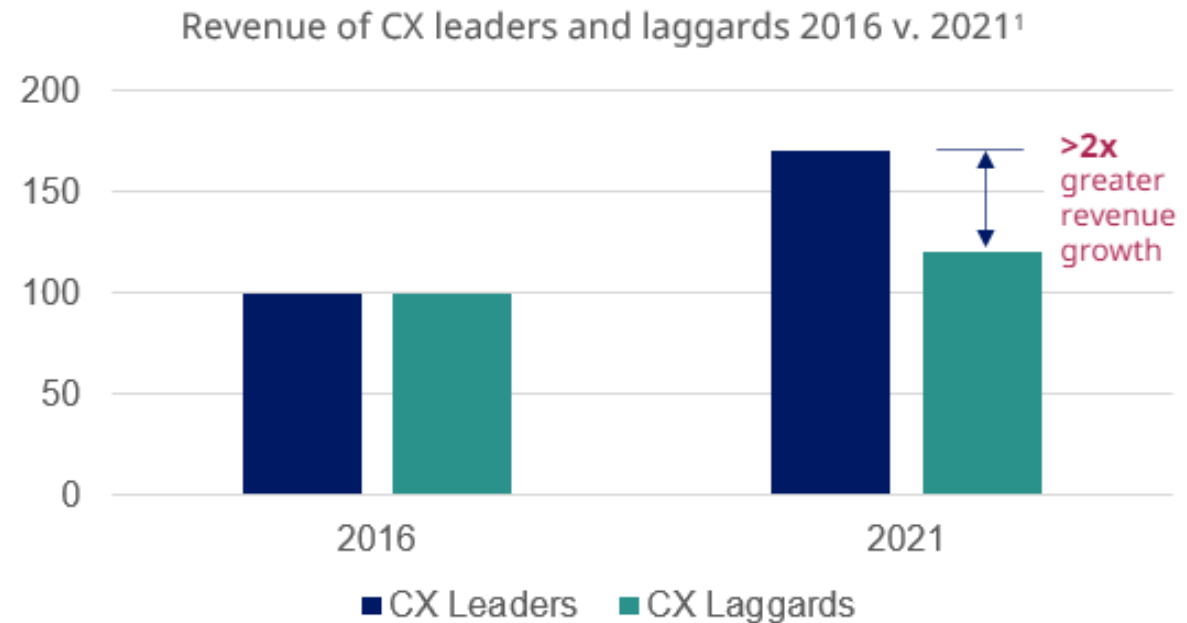
Hypotesen



Hvorfor tror vi på hypotesen?

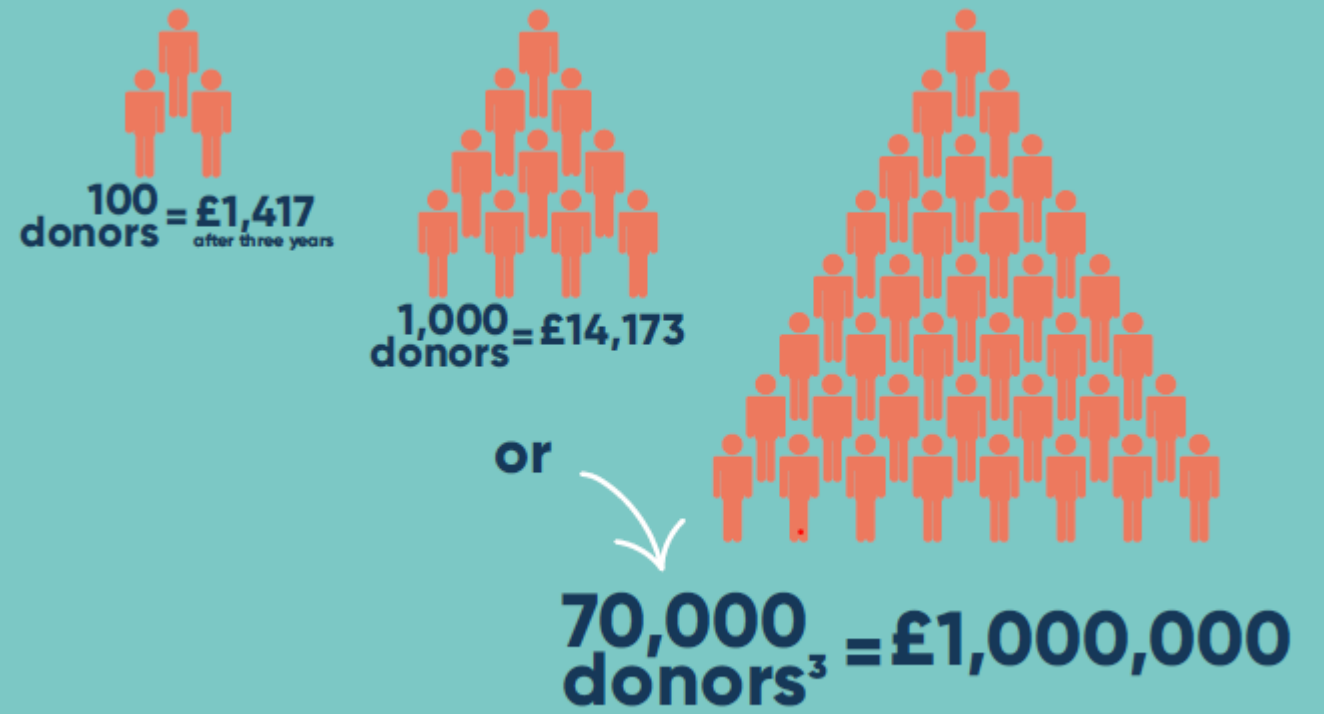
- **66%** of customers share that the quality of their CX experience has a strong influence on loyalty
- loyal customers being **5x more likely** to purchase again from a brand”

Companies across different industries who **lead in CX** are shown to **outperform competitors** on revenue growth

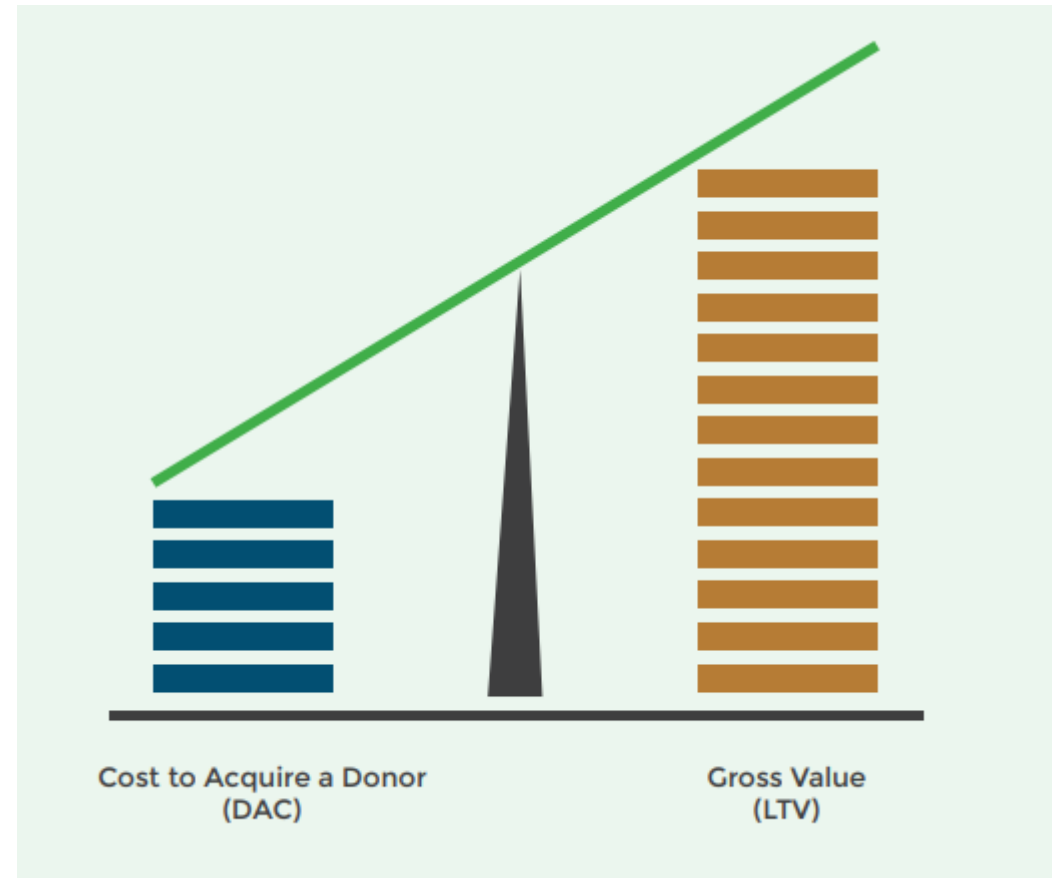


'Chase Index'

- 12 NGOer
- 50,000 donorer
- 3 år



Vi investerer ikke nok i engagement



Daily Mail

Why so many pills are **TOO BIG** to swallow GOOD HEALTH

Britain's biggest charities ruthlessly hound vulnerable for cash - even if they try to opt out of receiving calls

SHAMED: CHARITY COLD CALL SHARKS

Daily Mail INVESTIGATIONS LIVE

COWELL'S HEARTBR

THE Sun 40

OLDEST POPPY SELLER SUICIDE

Poor Olive, 92 was hounded by other charities 10 begging letters a day

KILLED BY HER KINDNESS

BRIDE & VROOM

£10 BIKINIS



The Commission on Donor Experience (2017)



STOP FOCUS PÅ ROI



**FORSTÅ KUNDEOPLEVELSEN
OG MÅLE DEN**

Hvordan har man typisk målt kundeoplevelsen?



Kunde support

Call Abandonment Rate
Time to thank and bank
Complaints



Donorer

Attrition rates in first year / Churn
Email opens / clicks / Unsubs
Consent
Survey engagement rates



Andre mål

Frivillig support
Proactiv engagement
SoMe engagement

| | Net Promoter Score (NPS) | Customer Satisfaction (C-SAT) | Customer Effort Score (CES) | Loyalty | Other |
|---------------------------------------|--|---|---|--|---|
| | A single measure of how your donors feel | Benchmarking your donors' emotional loyalty | Measure your donors' commitment | Understand how happy your donors are with each communication | Measure and benchmark donor satisfaction |
| Reason it works | One question can identify all of a donor's feelings about you into one action | This measures how donors feel at every Moment of Truth | Your role is to make it as easy as possible for a donor to do what they want to do. | Loyalty brings together many factors to understand feelings that a donor has into a measure of with feeling of support or allegiance | Measure and benchmark donor satisfaction |
| Question(s) | Using a 0-10 scale: How likely is it that you would recommend [charity] to a friend or colleague? | Various aimed at understanding different aspects of your communications | How much effort did you personally have to put forth to handle your request? | Various, aimed at understanding the key drivers of Commitment, Satisfaction and Trust | Various, depending on what your donors feel is most important. |
| Methodology | NPS = proportion of Advocates (score 9 or 10) less proportion of Detractors (score 0-6) | Depends on the questions. Multiple questions should be looked at together. | On a 5- or 7-point scale from very low effort (1) to very high effort (5 or 7) | Create an overall score based on these drivers or measure one of the drivers (usually Commitment) if that is most relevant. | Various, but usually quantitative |
| Uses – overall feelings | Good for measuring how donors feel about you or about specific products or events | Good for measuring how donors feel overall. | Good for measuring the ease donors experience at different Moments of Truth | | Good for measuring how specific communications make your donors feel |
| Uses – specific communications | | And good for measuring the impact of specific communications | | Good for understanding the overall impact of your communications on how donors feel. | And for measuring their overall feelings of loyalty |
| Advantages | Simple tool to use, measure and track Able to quantify and benchmark | Diagnostic: you can understand why donors feel the way they do Flexible: you can ask questions tailored to your needs and donors | Simple tool to use Able to quantify and benchmark | Looks at all aspects of how a donor feels Ability to focus on the most important elements or drivers | Tailorable: specifically for your donors and your charity Effective at educating and inspiring colleagues to get behind it |
| Disadvantages | May not be relevant for traditional donors who believe charity giving is a private decision. Simplistic: doesn't explain why people feel like they do | Less simple for the donor: Donors may not want to complete a longer questionnaire | Is this as relevant for a charity where ease of accessing a service is less important to a donor? | Risk of over-complication | Possibly complex and/or expensive Less tried and tested No ability to benchmark against other organisations |



Kundeoplevelse /
engagement KPIer
fra NGOer



‘Engagement Score’

Kunder får uddelt point når de...

- Kommunikerer proaktivt
- Deler deres forhold til organisationen
- Donationer/fundraiser
- Tilfredshed (survey)
- Attitude (survey)

Maximum på 100

Bruger journey segmentering baseret på point



5 pillars

- F-RES (Full resolution)
- C-SAT (Customer Satisfaction)
- Effort (Ease of use and making contact)
- Speed of answer
- Personalisation (Warmth and friendliness)

Post conversation feedback surveys

- Did we resolve your query?
- Were you satisfied with your experience?
- How easy was it to contact us?
- How quick was it for us to help you?
- How warm and friendly was your conversation?



What we ask our supporters
Full Resolution - How much our supporters felt their enquiry was fully resolved
Customer Satisfaction - How satisfied our supporters were with their experience
Ease of Contact (Effort) - How easy, and how much effort was needed to contact us
Speed of response - How quick our supporters felt their enquiry was handled
Warm and Friendly - How personal we made the conversation with you

We measure by combining top 2 ratings per pillar

| | |
|--|------|
| Outstanding is delivering beyond expectation | 90%+ |
| On Track is delivering what is expected | 85%+ |
| Developing is getting close with lesson to learn | 75%+ |
| Unsatisfaction is unacceptable and urgent repair | 75%- |

IN THE MOMENT FEEDBACK SURVEYS

BEHAVIOUR PILLARS OVERALL

| Weekly | Did we resolve your query | | | | Were you satisfied with your experience | | | | How easy was it to contact us | | | | How quick was it for us to help you | | | | How warm and friendly was your contact | | | | | | | | | |
|--------------|---------------------------|----------------------|-------|--------------------|---|-----------|------------|-------|-------------------------------|-----------|-------------|-----------|-------------------------------------|-----------|------|------|--|-------|-----------------------|-------------|----------------------|--------------|-------|----------------------|-------------|---------------------|
| | Surveys completed | Pillars Combined Avg | Top 2 | Beyond expectation | Fully | Partially | Not at all | Top 2 | Very satisfied | Satisfied | Unsatisfied | Very poor | Top 2 | Very easy | Easy | Hard | Very hard | Top 2 | Quicker than expected | As expected | Slower than expected | Way too slow | Top 2 | Very warm & friendly | As expected | Could be friendlier |
| Average | 41 | 95% | | 33% | 55% | 8% | 4% | | 78% | 18% | 2% | 2% | | 86% | 13% | 0% | 1% | | 74% | 22% | 1% | 3% | | 75% | 22% | 2% |
| Last year | 69 | 95% | 87% | 37% | 50% | 9% | 4% | 95% | 78% | 17% | 3% | 2% | 98% | 87% | 11% | 1% | 1% | 96% | 74% | 22% | 2% | 2% | 98% | 81% | 17% | 1% |
| Year to Date | | | 88% | | | | | 96% | | | | | 98% | | | | | 96% | | | | | 97% | | | |

NSPCC Supporter Happiness Score



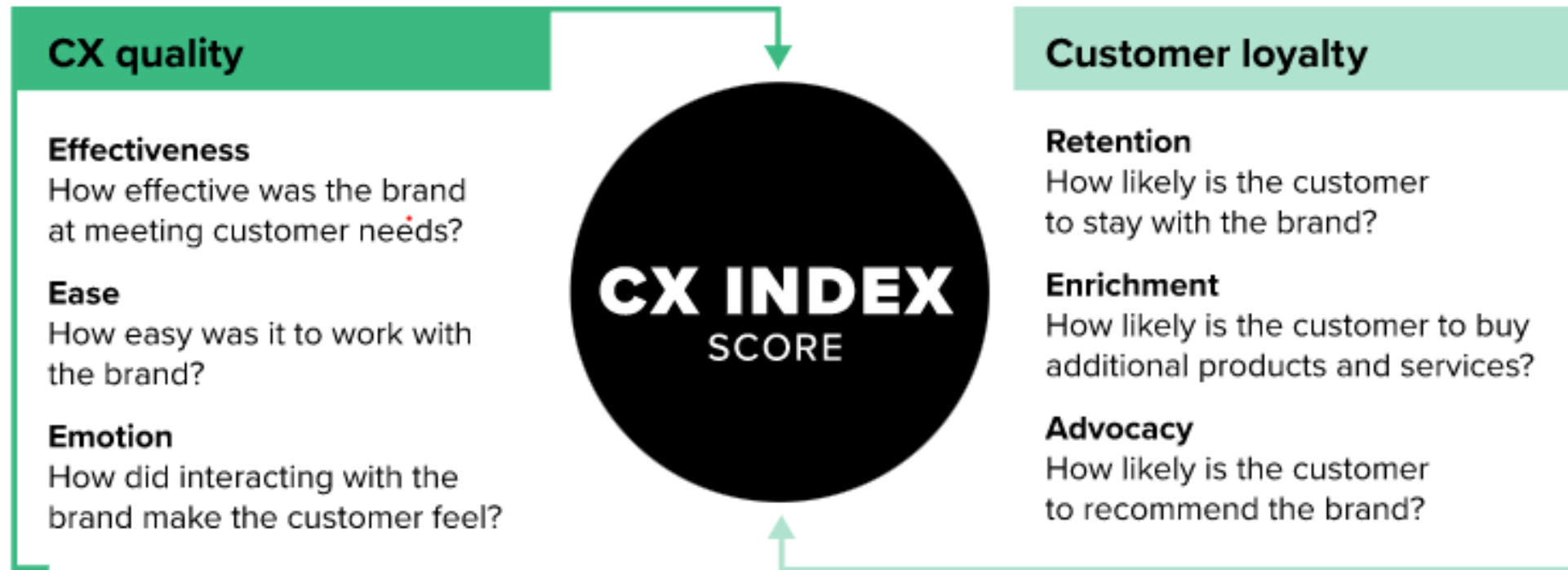
Trust, Satisfaction and Commitment have been shown through charity sector research study to be key drivers of claimed future support*



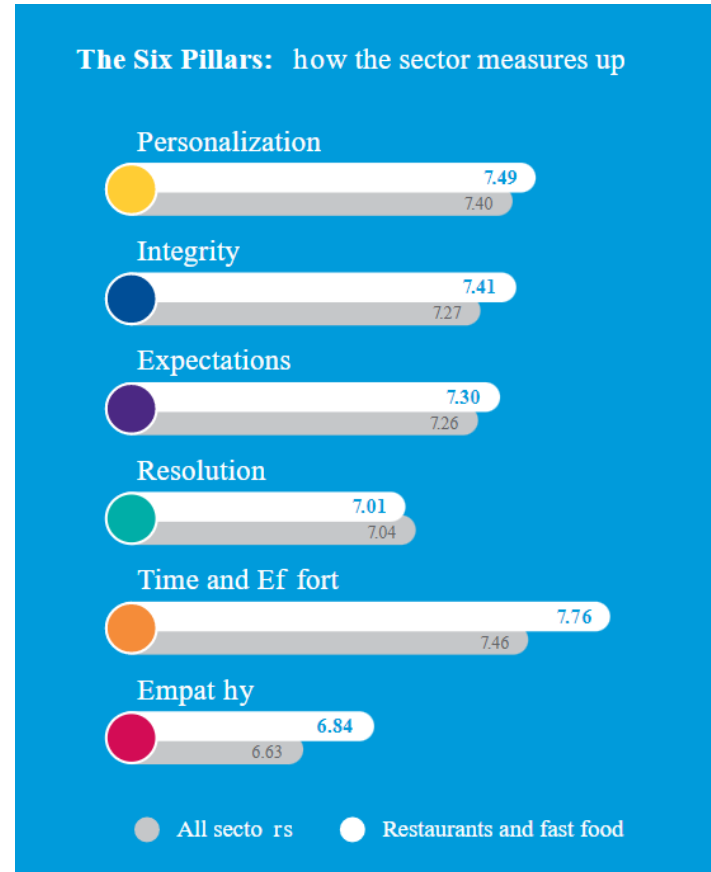


Mål brugt i det
private

Forrester CX Index



'Customer Experience Excellence' score of KPMG



The 2014 Customer Champions

| RANK 14 | BRAND | SCORE 14 | | RANK 13 |
|---------|---------------------|----------|-----|---------|
| 1 | first direct | 8.42 | ⬆️ | 3 |
| 2 | John Lewis | 8.33 | ⬇️ | 1 |
| 3 | | 8.30 | ⬇️ | 2 |
| 4 | LUSH | 8.22 | ⬆️ | 7 |
| 5 | amazon | 8.17 | ⬇️ | 4 |
| 6 | | 8.04 | NEW | - |
| 7 | Waitrose | 8.00 | ⬆️ | 10 |
| 8 | | 7.95 | ⬆️ | 26 |
| 9 | Specsavers | 7.90 | ⬆️ | 12 |
| 10 | | 7.89 | ⬇️ | 6 |

Measure Three Types Of CX Metrics



What **happens** during customer experiences

Sample metrics:
Call wait time, website errors

Sample sources:
Digital analytics, POS systems, Call Center systems

What customers **feel** about their experience

Sample metrics:
Satisfaction, Ease, CX Index

Sample sources:
Surveys, sentiment analysis

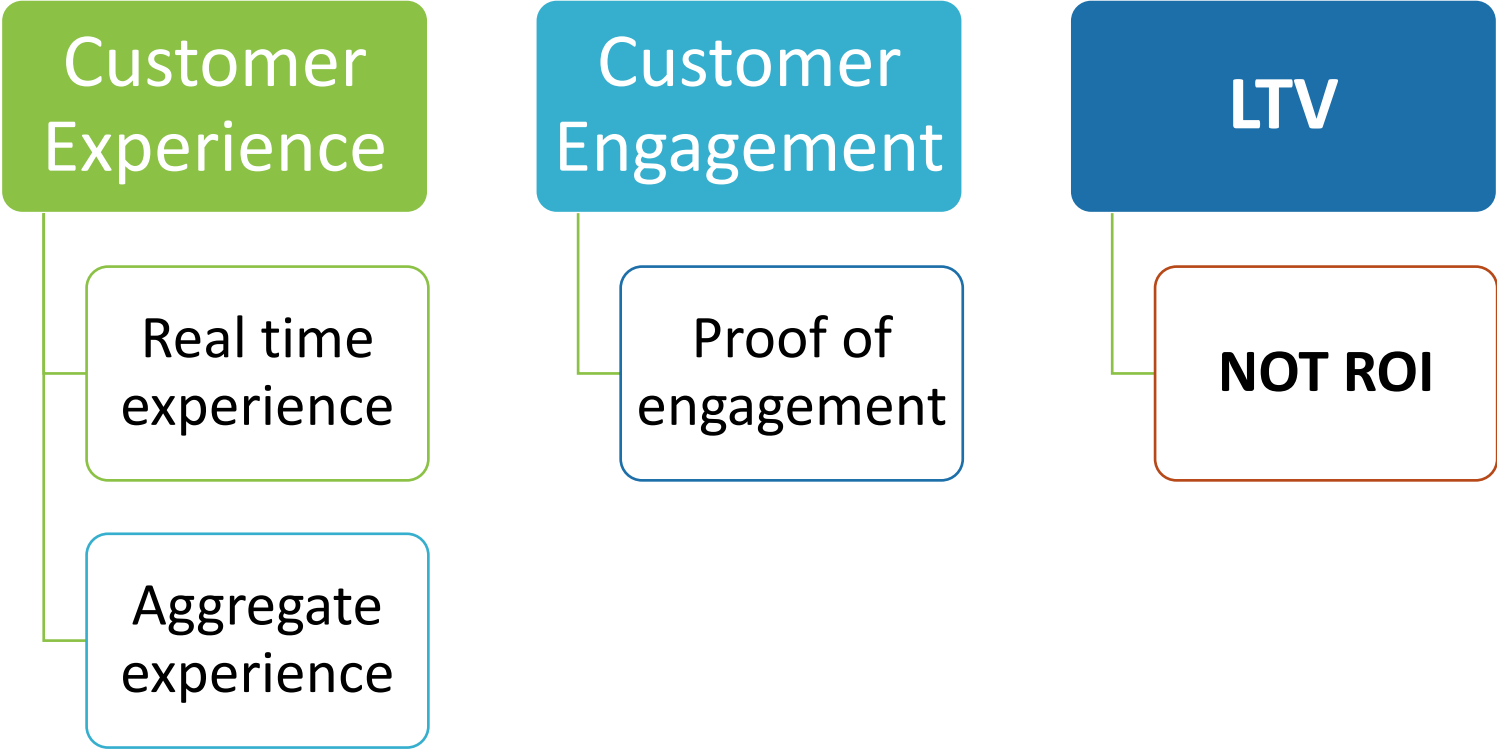
What customers **do** as a result of their experience

Sample metrics:
NPS, churn, product holdings

Sample sources:
Financial/transactional data, surveys

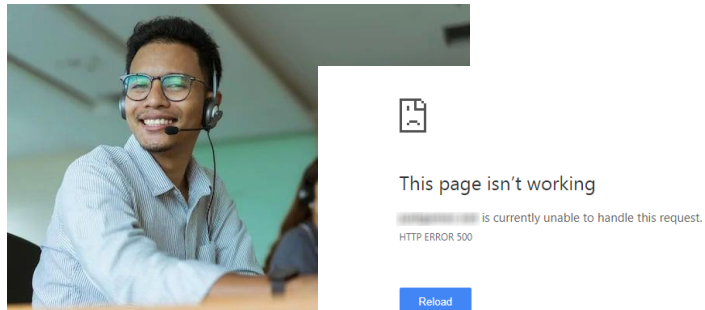
FORRESTER®

Prostate Cancer UK



Prostate Cancer UK

- **REAL TIME EXPERIENCE:**
C-SAT (customer satisfaction)



- **AGGREGATE EXPERIENCE:**
Customer Loyalty Score



Loyalty score = aggregate experience

Baseret på 'Chase Index'

THE SURVEY

Build an annual survey based on Chase Index Loyalty Survey.

Commitment, Satisfaction, and Trust.

Survey respondents have option to opt-in to record responses.

THE ANALYSIS

Where respondents opt-in to data match back, will be able to use that holistic data in analysis.

Analysis of survey data at an overall level, customer-type level, demographics, customer tenure...

THE INSIGHT

Deliver engagement and experience insights and recommendations for teams to action.

Customer Loyalty, Satisfaction, Trust and Commitment scores tracked over time, identify how correlates with behaviour.

Engagement Score

- Works on a **'points system'** to quantify how engaged customers are. LTV isn't the only measure of "good" - taking a more holistic approach by quantifying a 'value' for non-financial actions
- Customer stewardship may differ considerably depending on the engagement band

Super engaged Sarah: 76 points

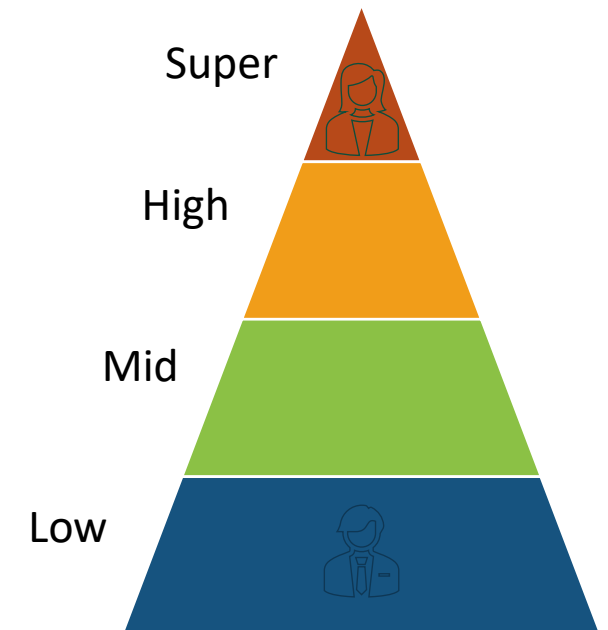


| Action | Points |
|---------------------|--------|
| Legacy Pledger | + 50 |
| Active RG | + 15 |
| Event sign up | + 9 |
| Cash gifts last 1yr | + 2 |

Low engaged Lenny: 3 points



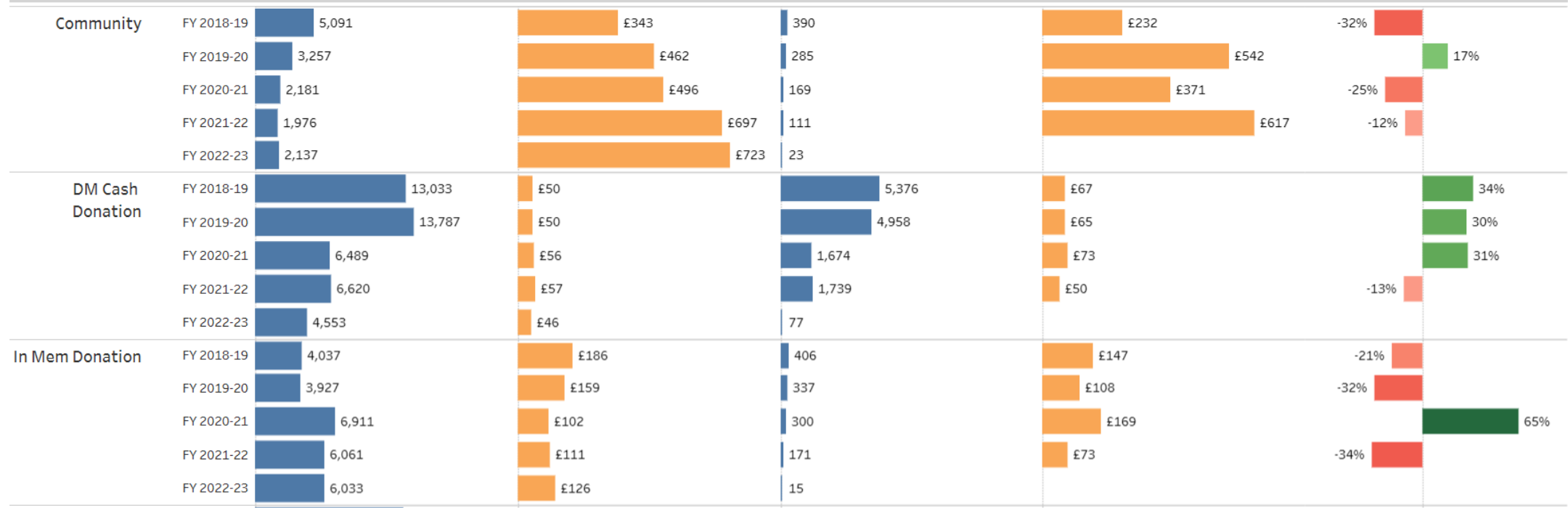
| Action | Points |
|------------------|--------|
| Bought pin badge | + 2 |
| Opens emails | + 1 |



LIFETIME VALUE

Customer Lifetime Value (LTV) YoY Change

> Customer LTV by Recruitment Product and Recruitment Year:



Prostate Cancer UK

| HOW GOOD IS THE EXPERIENCE RIGHT NOW? | | | | | | | | | |
|--|---------|---------|-------|--------|-------------|------------|-------|---------|----------|
| Customer Satisfaction Score - last 30 days | | | | | | | | | |
| | CX team | Website | Email | Events | RG lapse | | TOTAL | AVERAGE | % CHANGE |
| C-SAT score | | | | | | | | | |
| # responses | | | | | | | | | |
| % above target | | | | | | | | | |
| HOW GOOD IS THE EXPERIENCE OVERALL? | | | | | | | | | |
| Loyalty Score - Last cohort | | | | | | | | | |
| | Cash | RG | Shop | Events | Information | Volunteers | TOTAL | AVERAGE | % CHANGE |
| Loyalty Score | | | | | | | | | |
| # responses | | | | | | | | | |
| % above target | | | | | | | | | |
| HOW ENGAGED ARE CUSTOMERS? | | | | | | | | | |
| Engagement score - last quarter | | | | | | | | | |
| | Cash | RG | Shop | Events | Information | Volunteers | TOTAL | AVERAGE | % CHANGE |
| Engagement score | | | | | | | | | |
| # responses | | | | | | | | | |
| % above target | | | | | | | | | |
| HOW DOES THIS RELATE TO INCOME? | | | | | | | | | |
| Annual LTV | | | | | | | | | |
| | Cash | RG | Shop | Events | Information | Volunteers | TOTAL | AVERAGE | % CHANGE |
| Year 1 | | | | | | | | | |
| Year 2 | | | | | | | | | |
| Year 3+ | | | | | | | | | |
| # responses | | | | | | | | | |
| % above target | | | | | | | | | |

Hvad bruger vi det til?



Rapporter tilbage til teams, og identificer områder for forbedring



Identificer de følelsesmæssige drivkræfter, der skaber en følelse af loyalitet



Udvikle en skræddersyet loyalitetsscore og forstå, hvilke 'touchpoints' gælder mest



Udvikle taktikker for, hvordan vi kan flytte kunder op i engagementspyramiden



Optimere efter engagement og LTV!

Tak!

Man kan læse mere om Engagement Scores mm. på min blog.

medium.com/@supporterengagement