

A Spotlight on PVA and Merkle RMG: A Partnership Serving Those Who've Served

About the Client

Founded in 1946 by returning World War II veterans, the Paralyzed Veterans of America (PVA) has developed a unique expertise on a wide variety of issues involving the special needs of armed forces veterans who have experienced spinal cord injury or dysfunction. PVA is a leading advocate for its members regarding quality health care and research and education; available benefits resulting from military service; and civil rights and opportunities that maximize members' freedom and independence. PVA has nearly 19,000 members and provides services through 69 service offices and 34 chapters.



**Paralyzed Veterans
of America**

Background/Situation

PVA receives over 34,000 calls and more than 50,000 e-mails annually from donors and other individuals regarding the organization and its programs. Those communicating with PVA also want to update their information in the database, request more mailing labels, and make donations.

Recognizing the need to stay focused on its core mission of supporting paralyzed veterans and their families, PVA had long ago outsourced their donor contact center services. The organization requires a partner for this critical function that can respond to donor inquiries in a timely manner and provide accurate information about its purpose and activities.

Merkle Response Management Group (RMG) began to serve PVA in early 2007 as a result of an acquisition. At that time, response times to both PVA donors and staff were poor and the interactions didn't always reflect well on the organization's service levels.

"PVA was facing a difficult situation at that point," said Dana Hickman, Associate Director, Database Management at PVA. "We couldn't handle the incoming contacts ourselves and we needed a service partner that would provide a consistently positive experience for our donors and be responsive to our needs as well."

The Merkle RMG Solution

Merkle RMG brought the experience it had developed from serving nonprofit organizations since 1983 to begin to immediately improve the donor experience and manage the calls according to PVA's requirements.



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Merkle RMG's ISO certification and focus on staff training have been significant factors in that initial transformation and ongoing success in supporting PVA's needs. Merkle RMG has been certified to ISO 9001:2008 since 2002, a quality management and continuous improvement framework that requires complete documentation of all business processes. The framework also requires regular audits both internally and externally to confirm conformance.

Responding to information requests requires Merkle RMG staff to be highly versed on PVA, including its mission, culture, philosophy, involvements, programs, business rules, policies, procedures, history and constituents. All of this is captured in a 120-page document that also serves as the basis for initial and ongoing training of Merkle RMG donor care representatives. Constantly updated in coordination with PVA staff, this detailed documentation and training ensure that the agents have a thorough and extensive knowledge of PVA, enabling them to provide reliable and quality responses to their donors.

"Merkle RMG operates on the front line in serving PVA's donors," said Hickman. "The majority of the time, the first interaction donors have with PVA is through Merkle RMG and they make sure it is a positive one."

The Merkle RMG solution also incorporates an "ask" into nearly every incoming call – effectively making every conversation an opportunity to generate revenue. In 2015, the highest percentage of incoming calls came from donors requesting general information about PVA. By first responding to the donor's initial inquiry and then following with a donation request before ending the call, Merkle RMG has been instrumental in helping PVA increase its donation revenue, meeting and even surpassing yearly fundraising goals for the contact center.

A significant percentage of contact center calls come from donors who wish to be removed from the nonprofit's mailing list. Merkle RMG gives PVA's callers the option to simply reduce the number of mailings they receive, as opposed to being permanently removed from a mailing list. This approach is considered an industry best practice for improving donor retention, typically leading to between a 15 and 25 percent increase in retention rates.

Not content to rest on their laurels, PVA and Merkle RMG have bi-weekly live call monitoring sessions and also review audio recordings of selected calls so both organizations can collaborate on understanding what donors are saying, what responses they are receiving, and what refinements the two organizations can make together to be even more effective.

In addition to contact center services, Merkle RMG manages PVA's premium fulfillment, helping the nonprofit more quickly and accurately deliver promised items such as calendars, notecards, CDs, lapel pins, tote bags and program literature.

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Results

Over the decade since the partnership began, PVA has seen a consistently high level of service and has been able to continually raise the bar in donor care and revenue generation. Merkle RMG's solution has resulted in timely answers to phone calls and e-mails, consistently accurate answers to questions from donors, and swifter back-end fulfillment.

In his role at PVA, Hickman has been working with Merkle RMG since the partnership began. He has personally observed significant improvements over the course of the relationship. "Merkle RMG is incredibly responsive," Hickman said. "What used to take us two weeks or more is now accomplished in one week or less."

Merkle RMG's practice of soliciting donations from every incoming call has yielded significant returns. In each of the last three fiscal years, PVA has surpassed its revenue goal by over 100 percent; in 2015 the annual revenue for the contact center at Merkle RMG was nearly \$283,000 – more than 160 percent above goal.

"On its own, PVA would need to significantly increase its staff to manage a workload of this size," Hickman noted. With Merkle RMG's support, the organization is able to more cost-effectively serve its donors and allow PVA staff to focus on its mission and the veterans it serves.

A Relationship With a Past and a Future

By consistently delivering proven and measureable benefits, Merkle RMG has forged a trusted relationship with PVA. As a result, the client is confident turning to Merkle RMG to provide additional services. Most recently, the nonprofit began forwarding donations received at their Washington, D.C. headquarters to Merkle RMG for processing support. With this added responsibility, Merkle RMG becomes even more integral to PVA's donor relations.

By providing a seamless experience as the first point of contact for PVA donors, Merkle RMG effectively functions as an extension of their client organization.

"To our donors, they *are* the PVA" said Hickman.

The relationship between Merkle RMG and PVA is characterized by a shared sense of partnership. PVA credits its success to Merkle RMG's well-trained staff, who have a clear understanding of PVA's mission, business rules, culture, voice, expectations, and goals. PVA ensures that Merkle RMG contact center staff members have the necessary current information so they can more effectively serve as ambassadors of the organization.

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