The telephone rings and instead of an automated voice, customers are surprised to be greeted by a friendly operator. Whether calling to check on cable bills or to change a credit card, everyone wants to be treated like a valued individual. At the same time, offering personalized treatment benefits organizations by making it possible to form relationships and influence callers’ decisions. Is your nonprofit taking full advantage of its inbound call center?

A call center might not be the first tool that comes to mind when nonprofits think of “tech,” but it is a form of technology that organizations can use to make a real connection. The hidden value of a call or contact center lies in the ability to build relationships with donors, while hearing and understanding the motivation behind their requests. Furthermore, by using tailored scripting to turn inbound donor calls into fundraising opportunities, contact center staff can have a significant impact on your overall fundraising goals.

Here are three conversations a contact center can turn into donations and opportunities to build relationships through a personal touch.

**I’d like to be removed from your mailing list.**

When a donor calls to ask to be removed from a mailing list, a personalized script allows call center professionals to respond to feedback from the unhappy donor. Hearing their concerns addressed and taken seriously can inspire donors to continue their relationship with the nonprofit and keep the potential for them to continue giving to the organization.

One way this can be achieved is by presenting them with an example of how they are impacting the cause and providing options that address their frustrations. Often reducing the frequency with which a nonprofit contacts a donor can make a significant difference. Some donors believe it’s all or nothing, but contact centers can help convey the multiple options for staying in touch with an organization. Nonprofits who take this approach are 15 to 20 percent more successful in retaining clients than those who immediately remove donor contacts upon request without listening to their true concerns.

**I ran out of address labels.**

When donors reach out for information about ongoing campaigns or to request an item like mailing labels, instead of simply answering the question, tailored scripting provides operators with the tools necessary to also capture a donation. By appealing to callers’ emotions and being responsive to their request, nonprofits can generate additional donations over the phone. When an appropriate ask is worked into the conversation before ending the call, inbound contact centers can be an extremely effective fundraising function and not just an overhead cost.

**Thank you for your gift!**

A donor doesn’t have to do the dialing to start a conversation. Nonprofits can also use call centers to make outbound thank you calls, which can help build stronger relationships and increase donations in the long run. This solution uses strategic scripting, a selective caller-assignment process and other best practices to help nonprofits strengthen relationships over the phone. Many donors expect a call to be a solicitation, so calling without an “ask” is a great way for a nonprofit to stand out and inspire donors. By implementing this strategy, nonprofits have seen a 53 percent higher than average gift amount in subsequent donations.

Regardless of the types of calls your nonprofit typically receives, every organization can benefit from contact centers that deliver personalized and serve a strategic role in your overall fundraising efforts. To learn more, including how a personal connection can improve fundraising for your nonprofit, check out Merkle RMG’s January blog post.
Customer Service News

I wanted to begin our Customer Service Spotlight by informing all of you that I recently celebrated my 10 year anniversary with the Merkle Response Management Group! Time truly does fly by when you’re having fun!

I have had the pleasure of working with the best non-profit, government, and commercial clients in the world over the past 10 years and many of you reading this article are not only my clients but my trusted partners and friends. I am thankful for each of you and the relationships we have developed over the years.

In addition to working with over 200 clients, I also have the pleasure of working with 575 employees that also care very much about you and the work they perform for your organization.

While we have had a solid Account Management strategy over the years, it’s time to take a new look at that strategy. One goal is to increase our Account Managers’ level of expertise within our industry. I want our employees to become experts in this area so we can exceed your expectations and not be complacent with just meeting them.

I am currently interviewing several of the finest Client Service Consulting companies in the country and expect to hire a firm soon. They will assist us in developing a road map that will not only redefine the way we look at customer service, but also help us revolutionize the way we think, react, train, and provide service back to you. I am looking forward to keeping you updated throughout the year with our progress as well as the delivering the end result. Outstanding customer service.

USPS News

Did you know that RMG tracks the deliverability of our USPS pick up locations by placing seeds in the mail for your organizations? Each month, my team selects clients and we mail from different drop off locations and then track the time it takes to receive the envelopes back at RMG. We not only track first class mail but BRE mail as well. We are compiling month’s worth of data on average deliverability time so we can help our clients make informed decisions about the postal facilities they should be working with. We believe as many of you do that the average length of deliverability absolutely has an effect on the donor experience. We want to get the acknowledgment in the mail as quickly as possible and having this type of data at your fingertips can allow us all to make USPS location decisions much easier and less time consuming than testing different locations. After collecting seventeen months of data, the average deliverability time from mail date to receipt date at RMG for the following USPS locations is below:

- Baltimore MD – 5.7 days
- Brentwood (DC) – 8.0 days
- Merrifield VA – 8.2 days
- Hagerstown MD – 4.3 days
- Greencastle PA – 2.8 days
Recurring gift programs simplify giving for donors and increase donor retention and lifetime value for nonprofits. As a result such sustainer programs have grown in popularity, but to maximize their effectiveness they also require a comprehensive sustainer processing and management solution to support them. Sustainer programs present both unique and familiar challenges, including accepting sign-ups through multiple channels, effectively dealing with donors’ desire to set their own giving schedules, securely handling credit card and EFT charges, and properly acknowledging gifts in a timely manner.

Merkle RMG now offers a complete sustainer processing and management solution that supports multi-channel sign-up and update capabilities, flexible giving schedule options, a robust processing engine and database, timely donor acknowledgment, donor service support via our contact center, and comprehensive reporting.

The centerpiece of our solution is our new custom-developed software application called Aeon. Our Aeon-based solution supports recurring gift set-up via phone, mail, online, and file upload; complete flexibility for giving frequency and amount; donor information and giving updates (including suspends); multiple pay types; credit card updating; exceptions identification and handling; triggered acknowledgments via e-mail, letter, or phone; and customizable reporting.

Please contact your Account Manager to learn more about Aeon and how our turnkey sustainer management solution can help you effectively manage and grow your recurring gift program.

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**Best Practice - Scanline Specifications**

Our recommended scan specifications are designed to maximize the quality of character recognition and limit the costs for scan line repair and manual data capture. Below are the primary takeaways from our Scan Specifications document.

**Document Construction Requirements:**
- Leave 1/4 inch of White space around scan-line
- Preferred white background behind data *(refer to your print vendor for approved drop out colors)*
- Paper Weight/Size/Material
  - 16 to 32 lb.
  - Maximum size 11 X 17** inches, Minimum size 2.5 X 2.16 inches
  - Leading edges must be squared *(i.e. no rounded edges)*
- No punch out sections on the reply portion of the document *(i.e. membership cards)*
- Ensure that any areas for signatures, endorsements or other items do not interfere with the pre-printed scan line
- Orientation of the Scanline should follow the document orientation *(i.e. do not place a Scanline vertical if the document is horizontal)*
- Same font size should be used for Name and address as used for the Scanline *(minimum of 10 point)*.

**Scan-line Construction Requirements:**
- Font size should be a minimum of 10 point Non Extended, fixed spacing
- Black color, non-bold type
- Approved fonts:
  - OCR A
  - OCR B
- Scan-line format = ID# + mail code + check digit *(if check digit is available)* with 2-3 spaces separating fields.
  - Note: If you are not able to adhere to the above format please contact your account manager/Implementation for further discussion.
- Do not stack or split scan lines
- Do not use dashes, slashes or symbols in the scan line
- Check digit routines strongly recommended for validation of the entire scan line

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**Service Spotlight - Recurring Gifts**

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Please contact your Account Manager to learn more about Aeon and how our turnkey sustainer management solution can help you effectively manage and grow your recurring gift program.