

Have you ever run a supporter survey, but not been quite sure what to do with the results?

Supporter surveys can provide an affordable base of quantitative insight to kickstart nonprofits on their journey to better understand their supporters. But to do justice to the valuable insights from such studies, survey data must be mined as thoroughly as possible. But without executive sponsorship and cross-functional engagement, actioning these insights is challenging.

In a two-staged project, The HX Consultancy worked with SFHD to fully leverage their supporter survey data and drive actionable results. The outputs have not only enhanced their supporter experience, but also driven buy-in and engagement across senior leadership and previously siloed teams to achieve results.



Stage 1: Supporter Survey Deep Dive

Last year, SFHD conducted a comprehensive survey of their supporters, gathering responses both online and via the post. Survey Monkey gave a nice download of pie charts, but having inputted their postal responses, they found that without research or analytical capacity in-house, it was proving tricky to bring their insight to the next level. And without coded responses to their open-ended questions, it was hard to draw out key qualitative findings from these valuable verbatims.

With over two decades of strategic insight experience, Jane Trenaman designed an analytical approach coupled with an interactive workshop with the senior leadership team. She created a tab spec to brief a seasoned data partner to deep dive the findings, layering in important filters, segmentations, and crossbreaks. The existing supporter journey materials were also examined as a core part of the desk research to ensure relevant recommendations that weren't re-inventing the wheel. (All templates were shared with the time so that they can replicate into the future).

All this formed the basis of an interactive workshop where insights were delivered in an digestible and engaging format with lots of interactive exercises with the senior leadership

team. The outputs of this session included development of **Supporter Promise** that will underpin a fresh leadership approach to nurture a culture that aligns organisational mission with supporter needs and motivations. Early **Supporter Personas** were also co-created, leveraging existing materials and institutional knowledge for a cost effective foray into this important foundation.

“HX Consultancy carried out a deep analysis of the anonymised results, prepared a comprehensive report, and facilitated a cross-functional workshop delivering the insights in an accessible and meaningful way. HX and Jane’s focus throughout was working to ensure the supporter is at the heart of our organisation and our approaches. The clear outputs from the workshop means that the insights will drive action rather than being a ‘nice to know’.”

Eimear Kellett, Senior Manager - Partnerships & Philanthropy

Stage 2: Supporter Journey Mapping Workshop

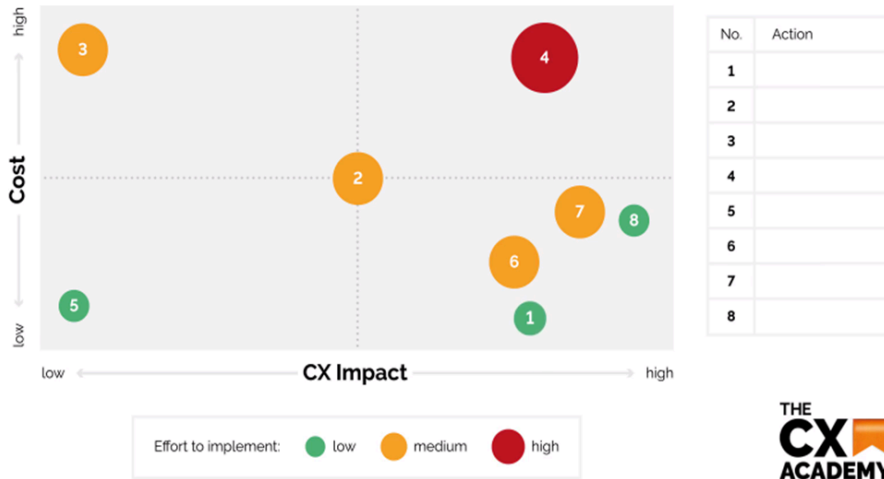
Taking actionability one step further, a deep dive into the supporter experience was required, to understand opportunities to optimise the journey of SFHD supporters. This stage had the added objective of engaging operational staff with outputs from the previous session, continuing to build clear practical actions.

Journey Mapping is an integral tool underlying the HX Framework. The cross-functional interactive workshop applied tried and tested techniques to bring SFHD to the next stage of their own journey. The session brought a wide range of colleagues together spanning fundraising, donor care, communications, finance and services. Together, this virtual team painstakingly mapped the journey stages, layering knowledge across processes, systems, people and - critically - donor emotions.... with responsibility stated and acknowledged as reaching far beyond donor care.

The value of collaboration in this exercise could not be understated, as the worlds of ‘Customer Experience’ and ‘Employee Experience’ merged. A shared approach to previously siloed problems will empower the team to continuously improve processes that can sometimes span disparate teams and objectives. One participant reflected, *“I honestly feel like my relationship with some of my colleagues has fundamentally changed through this process”*.

The team got together one last time for a one-hour virtual debrief capturing core observations and recommendations from the process. Final recommendations were prioritised together and mapped to form the basis for a tangible action plan of next steps.

The CX Academy **Opportunity Assessment Grid**



Just three months since the workshop, SFHD have already implemented or kicked off significant changes with positive implications for both supporters and staff alike. The learnings from this process are being powerfully combined with fresh strategic planning, internal audit work and web projects.

"I highly recommend HX Consultancy, not just for incredible knowledge but also for the way in which Jane delivers and presents. Her passion for this area of work is evident"

Eimear Kellett, Senior Manager - Partnerships & Philanthropy



Eimear Kellett, Senior Manager - Partnerships & Philanthropy SFHD

Jane Trenaman, Managing Director, The HX Consultancy