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RELATIONSHIP BUILDING & BRAND MANAGEMENT
UNITED WAY STANDARDS OF EXCELLENCE

Scope: Develop, maintain and grow relationships with individuals and organizations in order to attract and sustain resources to support United Way's mission.

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introduction:

United Way's ambition and potential to be a leader in community impact makes it imperative, more so than ever before, that we collectively embrace relationship building and brand management approaches that create a consistent, positive experience for our customers.

Our brand—any brand—is but a relationship; nothing more, nothing less. Like good human relationships, good brand relationships require authenticity, consistency in what we say and do, interaction rather than one-way communication, responsiveness, and integrity.

There is no question that your United Way must be doing community impact before it can be known and recognized as such. However, once your United Way has started to create impact, you must help current and potential customers understand and experience your United Way as a community impact leader.

By building strong relationships and creating a common, favorable experience for customers, your United Way can tap into a groundswell of potential support and resources to enable you—and the United Way system—to achieve even greater impact. Consider this: branding experts have valued the United Way brand at \$34.7B, which puts it among the top five global brands in terms of ability to attract revenue. By managing the brand to create a common positive experience, we can

We call the promise and delivery of this experience our Brand Value Proposition, which conveys to our primary target audience that United Way:

- **Appreciates their commitment**
- **Focuses on priorities**
- **Reports results**
- **Multiplies their personal impact.**

help our target audiences—wherever they are located, as they move from community to community—understand that supporting United Way is the best way to make a difference in communities. Managing the brand in this way will sustain and enhance its value and enables all of us—regardless of size or geographic location—to benefit equally.

Once your United Way—and a critical mass of others—have adopted some of the basic practices, we as a system must strive to acquire the capability and common data management systems to share donor/investor information. Only by doing so can we truly become “world class” in relationship building—and in achieving greater impact in communities.

Creating a more powerful brand will require us to shift our culture and mindset to center on relationships rather than transactions with customers. This shift begins with:

- **Knowing who your donors/investors are (i.e., getting their names). There is nothing more important.**
- **Prioritizing your efforts. Avoid trying to be all things to all people, but rather, focus on your active community investors and what matters to them.**
- **Getting consistent with the United Way brand identity and the ideal brand experience. Adopting the brand identity guidelines as soon as possible enables your United Way to tap into readily available resources from UWA and direct your own efforts and resources to the donor/investor experience.**

STANDARD 3.1: RELATIONSHIP-ORIENTED CULTURE.

United Way culture (i.e., norms, values and work practices) supports building relationships that help achieve its mission.

Practices:

- 3.1(a) Relationship Champion.** Designate a senior staff person as the “relationship champion”—the activist in creating an environment in which volunteers and staff become extraordinary stewards of relationships between your United Way and your investors and partners (e.g., individuals, corporations, foundations, labor, agencies, government groups and elected officials, civic groups, faith groups, media, neighborhood associations).
- 3.1(b) Information, Training and Tools.** Provide volunteers and staff with the information, training and tools that allow them to develop, maintain and grow relationships. Examples include database and tracking techniques, communications and “touch-point analyses” (to identify the actual points of contacts and interactions between United Way and your target audiences).
- 3.1(c) Accountability.** Build accountability for relationship building and brand management into job descriptions, performance reviews and rewards.

After conducting a rigorous touch-point analysis across the entire organization, one local United Way discovered that the department with the most frequent contact with investors was not campaign or marketing but finance, as they handled payment or processing problems that could be turned into relationship-building opportunities.



STANDARD 3.2: MARKET INTELLIGENCE.

United Way collects, analyzes and uses critical information about the market and target audiences, in order to better respond to market trends and customer requirements.

Practices:

- 3.2(a) Market Research and Analysis.** Know what matters to current and prospective donors/investors and volunteers. Identify the strengths and weaknesses of competitors and partners.

show

tell me and I will forget;

in

360°
VIEW



me

and I will remember;

involve me

and I will understand

Anonymous

3.2(b) Comprehensive View of Investors and Partners. Gather information that provides a “360-degree view” of current donors/investors, potential donors/investors and partners (e.g., giving history, special areas of interest, communication preferences, interactions with staff and volunteers). Use this information to design marketing strategies and execute campaigns. Use and integrate appropriate technology to manage information.

3.2(c) Metrics. Set goals and measure progress in retaining and growing existing investors and acquiring new ones (individuals, companies, foundations).

STANDARD 3.3: SEGMENTATION AND PRIORITIZATION.

United Way identifies and prioritizes key customer segments and partners to build relationships important to achieving community impact goals.

Practices:

3.3(a) Donor/Investor Segmentation. Segment and prioritize donor/investor groups, taking into consideration projected “lifetime value” (i.e., the projected revenues expected from a customer over his/her lifetime). Segmentation approaches might include demographics (e.g., age, gender, ethnicity), industry sectors (e.g., retail, banking), size (e.g., revenues, number of employees), channels (e.g., workplace, Internet) or areas of community focus or interest (e.g., children, homelessness).

3.2



“Do you know me?”

Begin by collecting basic contact information on current individual investors. Eventually, staff and volunteers know when an individual was last contacted, what goal or initiative s/he might invest in based on interests, and which events s/he will prefer to attend. If a Tocqueville member lives in two communities, the way to get the most from that relationship is for both United Ways to share the data, customer view and responsibility for managing the relationship.

- 3.3(b) Prospect Identification.** Identify prospects with the most potential for future growth. Consider lapsed investors, prospects who share characteristics of your current best customers, and untapped or under-tapped ethnic and age groups.
- 3.3(c) Partner Prioritization.** Identify which community partners are most valuable in implementing impact strategies and achieving community goals. Allocate resources to build these relationships accordingly.
- 3.3(d) Active Community Investor Focus.** Focus efforts on your active community investor—someone who wants to make a difference in the community and is actively engaged in doing so. These are our best customers, partners, and prospects because they share our passion for community.

STANDARD 3.4: ACTIVE CULTIVATION.

Your United Way actively cultivates, maintains and grows key relationships to increase loyalty and convert ambivalence or inertia, where it exists, to passionate support.

Practices:

- 3.4(a) Strategic Engagement Plans.** Customize year-round action plans for building relationships with your target audiences. Consider your return on investment to achieve specific goals for each key investor or partner group.

STANDARD 3.5: UNIQUE, POSITIVE BRAND EXPERIENCE.

United Way aspires to be the ideal partner for people who want to make a real difference in the community. We deliver results, engage, communicate, and create a consistent brand experience for our corporate and individual investors and key partners.

Practices:

- 3.5(a) Brand Performance.** Your United Way delivers results and demonstrates to its investors and partners that it fulfills our Brand Value Proposition, which is the foundation for your interactions with investors and partners. United Way promises your investors and partners to:
- Appreciate their commitment
 - Focus on priorities
 - Report results
 - Multiply their personal impact.



When you walk into a Starbucks anywhere in the country, it is about more than a cup of coffee. “...Nothing you see, smell, touch, taste and hear in its stores is an accident. There is no serendipity here, and nothing left to coincidence or chance when it comes to the customer experience.”

Scott Bedbury, A New Brand World

3.5(b) Consistent Brand Presentation. Provide messages and visuals that are consistent across all marketing channels and aligned with the national brand identity guidelines. Ensure that communication is clear, concise and targeted on a year-round basis. Help staff and volunteers understand and clearly articulate United Way’s mission, vision and community impact work in ways that connect with a variety of target audiences.

STANDARD 3.6: PROMINENT STATURE AND REPUTATION.

United Way has impeccable standing in the community and is recognized as a key leader on selected priority issues as well as a strong partner on a range of other community issues.

Practices:

- 3.6(a) Community Visibility.** Have specific strategies for the active involvement and visibility of CEO, staff and volunteers in the community.
- 3.6(b) Media Outreach.** Engage and inform the local media so that they become partners in communication.
- 3.6(c) Reputation Metrics.** Measure and strengthen trust, favorability, and the likelihood of volunteer and investor support. Measure growth in the number of opportunities your United Way has to “give voice” to important community issues.

Mission: To improve lives by mobilizing
the caring power of communities

Vision: We will build a stronger America
by mobilizing our communities to improve
people's lives



what matters.®

United Way
701 North Fairfax Street
Alexandria, Virginia 22314-2045

www.unitedway.org