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Philanthropic Marketing

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Building Your Team

Finding ways to maximize philanthropic marketing

Profile of a Successful Partnership Team

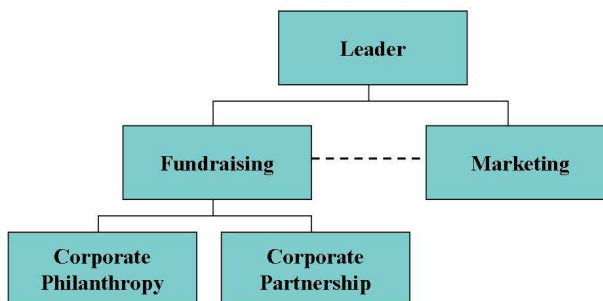
1. Proactivity
2. Critical Listening
3. Customization Know-How
4. Forward-Thinking
5. Investment of Time
6. Support from the Top

As the competition for corporate dollars grows and the lines between philanthropy and sponsorship blend, nonprofits are looking to build their management teams to ensure the greatest results. There are many critical issues nonprofits face when making marketing decisions.

One of the key issues nonprofits face is determining the right organizational structure. Should marketing report to fundraising or fundraising report to marketing? It doesn't matter. What matters more is that fundraising and marketing are coordinated. There is often an ongoing disconnect between the individuals or departments that secure or service corporate funding. Yet to leverage corporate partnerships to

their greatest extent, all contact points within a nonprofit must work together.

An ideal scenario is when marketing and fundraising are centralized under one person's watch, meaning there should not be separate departments or positions operating under discrete strategies. There tends to be a natural coordination within smaller nonprofits that have only a handful of staff or volunteers. However, with larger nonprofits, coordination should be formalized. For example, the person in charge of fundraising would oversee both traditional corporate philanthropy and corporate partnership including event sponsorships. The person in charge of marketing would then work closely with the head of fundraising to support the marketing and promotion of the nonprofit's corporate partnerships. The heads of fundraising and marketing would both report to the same leader, ensuring that one person is considering the big picture in a cohesive way. (See the accompanying "Organizational Chart for Centralizing Fundraising & Marketing" chart.)



A second key issue is putting in place the right partnership team. An ideal profile of a successful partnership team is when all the team members have the appropriate experience and ability to adapt to the nonprofit's culture. Additionally, key traits include:

1. **Proactivity:** A team that proactively pursues relationships. Surprisingly, many of the most recognized nonprofits fall into the trap of responding to opportunities that come over the transom rather than cultivating the relationships that have the most long-term potential growth. To deal with this challenge, there are an increasing number of newly-created positions dedicated solely for new business development.
2. **Critical Listening:** A team that carefully understands the potential partner's objectives. There are key questions to ask, such as:
 - What are the company's philanthropic and/or sponsorship objectives?
 - What types of partnerships have worked best for them?
 - If the company is new to partnerships, which budget might fund the partnership? What are the objectives of that department?
3. **Customization Know-How:** The ability to customize an opportunity to a partner's objectives is important. Taking the time to frame the opportunity so it answers to the prospect's priorities, rather than offering a generic pitch, will result in a 90 percent higher success rate.
4. **Forward-Thinking:** A team that designs partnerships that have potential to grow and become sustainable. The hallmark of philanthropic marketing relationships is that they are a natural fit, they maximize the strongest elements of the cause and corporation, and they are ongoing, evolving partnerships.
5. **Investment of Time:** A team that dedicates the time to nurture the partnership. Successful teams budget the necessary resources to service and grow relationships. Larger accounts or those that have more growth potential should get the most staff time.
6. **Support from the Top:** A team whose leadership is engaged and supportive of the relationship. Nonprofit staff and volunteer leaders who make partnerships a priority and are able to demonstrate importance of the partnerships to their leaders have longer-lasting, higher-level commitments. Keep your leadership apprised with regular executive updates at all stages of development-from the newest contact to the longest-running partnership-and invite select leaders to key presentations and partnership meetings. (See the accompanying "Profile of a Successful Partnership Team" chart.)

A third key issue is how to garner internal support needed to grow partnerships. The most successful teams become experts at internal marketing. Consider the departments or individuals who provide support for both fundraising and partnerships:

- Marketing
- Communications
- Programming
- Advocacy/Policy
- Publications
- Web site
- Advertising
- Public Relations

How well informed are the folks list above of the purview of your corporate relationships? Were they part of the partnership development strategy or are you coming to them after partners are sold-in? Are you offering partnership benefits that need to come from those areas? Plus, if you have local chapters, have they been kept in the loop? A national partnership cannot be implemented locally without local input and buy-in.

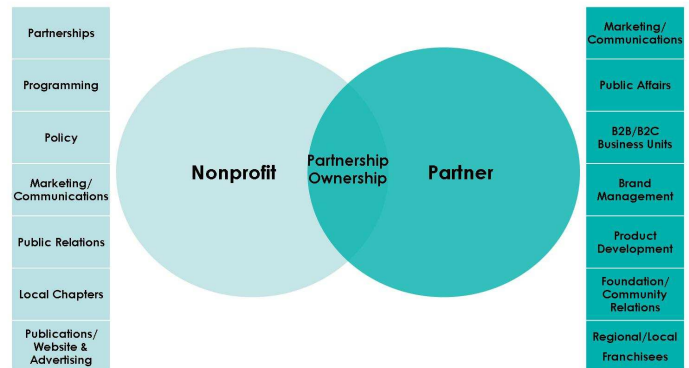
Take a two-pronged approach to keep the rest of the team in-the-know. First, bring in these other areas and chapters at your earliest opportunity—at least when you develop or change your partnership strategy, and definitely when you are developing proprietary programs for specific partners. In addition to securing internal buy-in, such coordination ensures you are creating partnership opportunities that can deliver what they promise-plus you’re likely to glean additional creative ideas and benefits.

Second, document an ongoing partnership update that you share with related entities regularly: monthly, weekly or, during high-activity times, daily. Make it clear which partnerships are connected to which departments. Don’t discount the value of face time. Meet with representatives of affected departments at set intervals to ensure everyone is still in the know and invested.

A fourth key issue is helping corporate partners leverage resources when many partner contacts are working within decentralized companies.

Partners have a cadre of their own impacted departments that needs to be communicated with and engaged. When identifying all the areas within your organization that touch a corporate partner, consider the same for your partners. Your main contact might be within one department, such as corporate affairs, but who else does the person need to sell-in to maximize the partnership? To highlight a few areas,

consider communications, marketing, brand management, business-to-business (B2B) and business-to-consumer (B2C) business units, product development, foundation/community relations, public affairs, regional/local offices --which might have their own marketing aims and goals -- and franchisees. If these other departments are strategically integrated into the partnership from the get-go, there is greater potential for tapping their multiple budgets to supplement the partnership. Plus, think about the company’s business or other nonprofit partners. You could suggest that your organization and the corporation reach out together to include these entities within the relationship, extending the reach and opportunities of the partnership. (See the accompanying “Leveraging Resources Across Nonprofits and Partners” chart.)



A fifth key issue is determining the best deployment of staff? Who gets assigned to what? Position all parties within their best skill sets. Compartmentalize partnership sales by expertise, either industry-specific or within an organization’s service offerings. Also, allocate staff time proportionately to the potential of each partnership.

For example, the American Red Cross offers a branded, pre-packaged customer donation program called “Your Help Counts,” a turnkey entry-level opportunity into Red Cross partnerships, which has one designated Corporate Partnerships team member who oversees and delivers all partner benefits within the program. For higher-level partnerships, however, more staff time is invested and team members are assigned by seniority and industry expertise.

In addition, consider allocating some team members to sales and some to servicing. Rather than expecting relationship managers to both develop and maintain partner relationships, create teams of two where one team member sells and one services. The team must operate as a cohesive unit—keeping in mind that the strongest sales come from the best servicing.

A sixth key issue is effectively motivating partners to collaborate. A meeting of the minds can produce amazing partnership extensions and added-value opportunities that supplement existing ties and liven up older partnerships. Continually consider opportunities to connect partners and facilitate creative discussion. Keep partners in touch and in the know through communication channels, such as annual summits, monthly or quarterly conference calls, weekly partnership updates or a dedicated Intranet site.

The process of structuring a management team to maximize philanthropic marketing relationships is challenging—yet enlightening—and has the potential to reveal new strengths and opportunities within your organization while enabling your organization to maximize resources and opportunities.

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