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## Philanthropic Marketing

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### **Proactively Communicating with Your Partners**

A common concern raised within cause-corporate relationships is a general lack of ongoing communications. Too often, corporate partners report that their cause contacts only initiate contact when the check is due. It used to be that those organizations that practiced some proactive communications were ahead of the pack. But today, making proactive partner communications a common practice is the price of entry necessary for collaborative corporate relationships.

Implementing standardized communications practices can help your organization regularly keep in touch with corporate sponsors, which can help evolve your relationship with your sponsors year-over-year, as well as further establish your organization as a problem-solving partner. In addition, going beyond sharing the standard communications and getting into more specific, tailored issues has the potential to help your organization move the needle of your mission with your partner through means previously unidentified.

The **first step** in developing a standardized communications platform is identifying the types of communication elements that will resonate most with your corporate partners without breaking the budget.

Examine the **channels you have in place already** and consider whether corporate sponsors can be included in the distribution or if you can modify a channel to speak specifically to partners. Within your Web site, do you have a security-enabled section for chapters or members? Extend that access to your partners. Consider your intranet—you include your employees and chapters in this content-rich channel, so give your partners access and include them in the email communications that go out to Intranet users. Or if you'd rather the partners not have access to the entire Intranet, consider creating a special page just for partners where they can find all the information they are generally seeking in one place. Does your organization conduct volunteer projects in your community or in your local chapters' markets? Employee volunteerism is a major focus of socially responsible companies, so be sure to extend those volunteerism opportunities to your corporate partners. Finally, consider the reports you prepare for organizations that have given you grant funding. Many grantors expect you to document how your organization utilized the grant and how it impacted your overall mission or the mission of a given program. This is the type of communication element that can be slightly modified to become a **Partner Report**. Reporting back is a key element in proving that your

organization can demonstrate return on investment for your partners. While sponsorship funding is sometimes unrestricted, companies purchase the right to affiliate with your organization because they believe in your mission and want to be part of the good work you do. Therefore, it is a best practice to share how your partners' individual commitments have helped you further your mission, grow a program and serve your constituents. You don't need to line-item every sponsorship dollar you allocated, but here is a checklist of suggested report contents that should resonate well with sponsors (see graphic):

- | Partner Report Contents |                            |
|-------------------------|----------------------------|
| I.                      | Executive Summary          |
| II.                     | Moving the Needle          |
| III.                    | Financial Leverage         |
| IV.                     | Cause Marketing Promotions |
| V.                      | Marketing and PR           |
| VI.                     | Research and Feedback      |
| VII.                    | Local Implementation       |
| VIII.                   | Closing Summary            |
- I. Executive Summary: Noting highlights over the year and particular achievements since the last report
  - II. Mission Impact
    - Ways in which constituents/clients/consumers benefited from funds raised
    - Number of constituents/clients/consumers benefited from funds raised
    - Any other measurable results
  - III. Financial Leverage
    - Where the funds went (if not into general fund)
    - How your organization leveraged the funds from the partner to achieve a mission- or project-specific objective
  - IV. Cause Marketing Promotions
    - Overview and visual examples of promotion
    - Funds raised to date
    - Promotional efforts run by your organization
    - Results: whether measured by your organization or results the company shared with you, putting all the cause marketing results in one section makes it turnkey to measure the effectiveness of the promotion
  - V. Marketing and PR
    - Examples of marketing/PR efforts conducted by your organization
    - Examples of earned media, e.g., partnership was mentioned in publication or newspaper, news channel in key partner market featured/mentioned partnership, etc.
  - VI. Research and Feedback
    - Any consumer research results conducted as a result of partnership, either by your organization or results partner shared with you
    - Feedback from consumers, retailers, donors or other stakeholder that your organization may have received in the context of this promotion
      - A note on sharing feedback: It is a nice touch to feature copies of letters and emails conveying positive feedback on a promotion that specifically mentions the partner. However, if a percentage of the overall feedback that your organization received was negative, partners should be made aware of negative reaction in the context of forming a proactive strategy to address or change the promotion or its messaging going forward
  - VII. Local Implementation
    - Local chapter/affiliate participation in partnership, including:

- In markets where the promotion was run, which of those markets overlap with your chapters' markets?
- Did local entities get involved in the promotion or execution of the partnership, such as featuring the offer on their Web sites or mentioning the partnerships in their e-newsletter?
- Did any of your local entities work with your partner's local offices/ franchisees to conduct local activation, such as providing volunteers to share promotional information, the company's employees volunteering, in-store fundraising by, etc.?

VIII. Closing Summary: Final big picture thoughts on the partnership, your organization's gratitude and an eye to the future to continue doing great things together

There are occasions within the cause industry when all **constituents want more communications** from your organization. This can be during times of a capital campaign, a leadership change, extraordinary media attention—positive or negative—or a disaster. Those relief organizations in the spotlight during 2005's catastrophic hurricane season learned quickly that they had to shore up communications to donors, partners and the media, and none learned that lesson quite so deeply as American Red Cross.

The exponential demand for Red Cross services and the related need for information, coupled with intense media coverage, led the Red Cross to expand its corporate marketing partner communication strategy to reach an audience *triple* the volume its systems were built to handle. Partners received daily updates on Red Cross relief efforts as well as turnkey information about how partners themselves could participate in the relief, including cause marketing programs, employee support services and various giving campaigns. Red Cross also implemented three noteworthy communication tools: daily disaster updates detailing the organization's ongoing service efforts so partners could appreciate the scope of their support to the overall relief effort; face-to-face donor visits as well as weekly conference calls with Red Cross leadership, including president and CEO Jack McGuire; and a "thank you" toolkit that companies could promote in their retail outlets and other vehicles to help communicate Red Cross' appreciation of their employees' and customers' generosity. The organization recognized the value of keeping partners informed and engaged in order to communicate that donor dollars were being used effectively as well as show appreciation for their help in the short term—and hopefully lead to support in the long term.

As the nation approached the 2006 hurricane season, the organization invited many of its relief partners to take part in a proactive, first-ever disaster relief Web seminar, which discussed lessons learned from the 2005 hurricane season, the steps the organization had undertaken to improve its operations, as well as the ways in which companies could quickly activate their support programs when disasters hit. In this way, the Red Cross further positioned itself as a go-to source for companies to aid in disaster relief in addition to demonstrating itself as a marketing partner that is poised to get partner promotions off the ground in short order.

A great way to proactively communicate with partners is to **give them the tools to generate their own good buzz**. America's Second Harvest—The Nation's Food Bank Network's communication team, fully apprised of all other departments' programs and needs, provides each major supporter a menu of opportunities detailing how the partnership could generate press. This menu represents an opportunity for the cause to show some creative thinking—and to demonstrate its capabilities as an in-house PR agency—but it also serves as a catalyst to spur the company to come up with its own ideas. The cause typically provides three-to-six customized, fully-researched communication concepts designed to play out in several ways, from garnering publicity to raising funds, based on the partner's objectives. And an added bonus of serving up ideas for consideration is that it helps America's Second Harvest manage the scope of expectations from the company's end; companies tend to respond back if an opportunity is too far-reaching for what they're able to commit or if they're looking for a broader concept. These managed expectations help the cause measure the effectiveness of the campaign at its conclusion as well, all of which aids the company in its renewal decisions.



This industry is well aware of the importance of **personal communications** with our corporate contacts, so the next step is to standardize your schedule for personal connections. There are four key elements to personal communications: phone calls, in-person meetings, VIP functions and partner summits.

With **phone calls**, to ensure you are being proactive, put in on your schedule regularly to call your corporate contacts—whether or not there is a specific activity occurring within the partnership. A “touch base” call says that you are always thinking about the partnership and the partner's role within it. Ideally, calls should be weekly or bi-monthly.

The next step is the **in-person meeting**. Cross-reference with your corporate contacts' locations and maximize work travel by trying to get some relationship-building time. If you don't have an upcoming trip to a region but it's been some time since you've seen your contact, schedule a trip and try to hit all the contacts in the region. Depending on your relationship with a given partner, come with probative questions so the meeting is fruitful. Some key questions to posit for discussion include: What else can we do for you? How have the company's constituents—leadership, employees, consumers, business partners—reacted to the partnership? Is the company conducting any consumer research, such as around loyalty or purchasing intent? Any employee research, such as morale? If so, what are the results? How do the results affect the way the company feels about the partnership and how can we help affect changes that may come as a result? Would the company be interested in cross-promotions with other partners of your organization to broaden the reach of the overall partnership? Finally, review where the company leadership stands on their objectives for the partnership—have they changed since you first established the relationship? How important is goodwill, increase in loyalty, sales generation, improved employee retention?

Another great practice to keep in mind: for your higher-level partners, have your CEO or a senior staff member conduct in-person visits, either for specific thank yous or check-ins when your leadership is traveling to a partner’s market.

Next, **VIP functions** are a great way to show partners your appreciation as well as to generate introductions between other partners to facilitate cross-promotions. Invite all partner contacts—and their bosses!—to your organization’s hospitality functions, notably those where your leadership is present. In addition, make check presentations VIP occasions, inviting partners’ leadership and local dignitaries. Finally, if you don’t have many VIP functions and don’t necessarily have the budget to build one, does your organization attend any high-end hospitality functions to which you could bring partner contacts? Or, if you are considering starting a VIP function, a great effort is to conduct an annual awards celebration for companies that are major partners and/or donors to your organization, such as United Way of America’s Spirit of America awards for its National Corporate Leaders. Try to fit in a recognition awards program to an existing VIP event or invest the funds to build an event.

Finally, a great way to grow personal relationships with partners is to host annual brainstorming **Sponsor Summits**. These meetings are great opportunities for your organization to promote new developments and programs, share successes and points of interest, and generate cross-promotions among partners. Invite all your partner contacts and supply them with “pre-work” so they come armed with ideas to share, all in the name of making each partnership better. However, some causes find that the majority of their corporate commitments come from the same industry, e.g., food or technology, and therefore an all-encompassing Sponsor Summit may not be likely. In that case, find opportunities for partner-to-partner networking and host smaller group activation sessions between partners who you think have the most potential to work together.

In any case—broad Sponsor Summits or small group sessions—here is a sample agenda of how these meetings could go (see graphic):

- **Welcome:** Highest ranking officer conveys how important partners and individuals in the room are to your organization and mission
- **Introductions:** development/partnership team, sponsor representatives and their agencies
- **Organization Overview:** Top-line updates relevant to partner program
- **Partner Overviews:** Overall objectives, target audiences and proprietary platforms
- **Brainstorming Session:** Discussing activation extensions with your organization and among each partner

**Sample Sponsor Summit  
Agenda**

- Welcome
- Introductions
- Organization Overview
- Partner Overviews
- Brainstorming Session

A final thought on personal communications: Don’t underestimate the value of engaging partners to join one of your committees, boards or task forces. These partners know your organization in a different way than general board members or employees and inviting

them into your fold demonstrates your willingness to truly make partners part of your mission-driven everyday business. If there are concerns about conflicts of interest on a given topic, you could establish a policy that the partner not vote on issues that might impact their companies as partners.

Consistent communication with your partners directly impacts your bottom line: those partners that feel ignored or simply as check-writers are less likely to renew at year's end. Chances are your organization already has many of these channels in place in some form and creating a more robust communications plan with partners will be just a matter of allocating a tool and making the time.

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