

ORIGINAL SITUATION

The increasing number of non-profits had caused 10 consecutive years of decline in annual donors despite being the second largest United Way in the country. The donor environment had changed and it was necessary for the Greater Twin Cities United Way to adapt.

BUSINESS IMPROVEMENTS

After adopting the *Counselor Salesperson* process, gifts increased 5%. Today, consultants spend the majority of their workday visiting donors instead of time in the office, doing paperwork, administrative tasks and responding to telephone requests.

The *Counselor Salesperson* discipline has helped managers identify critical skills and training gaps and is reflected in the group's hiring process. Today, managers focus on relationship skills rather than administrative and analytical skills when hiring potential consultants.

SEG's Commitment to Success at Greater Twin Cities United Way.

United Way Finds Success through Relationship Building.

By any measure, the Minneapolis-St. Paul area is among the most charitable in the nation. Yet, by 2002, the number of annual donors to the Greater Twin Cities United Way had declined for the tenth consecutive year.



Drastic steps needed to be taken.

The problem wasn't that the United Way was losing community support or that the community's charitable donations were declining. Rather, more non-profits were competing for the financial support of the same pool of major donors and organizations, explained Tim Deutch, Vice President of Donor Relations for the United Way.*

"Ten years ago, charitable giving was transactional. Donors wanted an annual visit and no more. Today, major donors want to make sure their charitable contribu-

RESULTS ACHIEVED



*EDITORS NOTE: Tim Deutch loved what SEG did for his United Way, that he joined the organization. His main focus is working with non-profit organizations.

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tions are invested wisely. They want information about how the donation will be used, how it fits with their personal values and priorities and the results they can expect. They are much more intimately involved in the process," said Deutch.

The Greater Twin Cities United Way is the second largest in the United States. In 2005, it was responsible for a budget of more than \$84 million in donations from corporate, employee, leadership and planned giving campaigns which was used to fund over 200 community service agencies. All agencies focus on one of three core areas: Nurturing children and families, meeting basic human needs and supporting health and independence. United Way's staff includes over 100 permanent and temporary positions, plus nearly 10,000 workplace volunteers.

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TIM DEUTCH

Vice President of Donor Relations, Twin Cities United Way

Seeking Inspiration

Faced with the prospect of changing the sales process for the organization, Deutch turned to an obvious source for inspiration – the business world, specifically Strategic Enhancement Group. For several years, Deutch had been discussing United Way's challenges with Bob Parks, Managing Partner for Strategic Enhancement Group. Parks strongly believed that *Counselor Salesperson* training would offer the perfect answer to the issues confronting the United Way.

"The *Counselor Salesperson* process focuses on building relationships and identifying the buyer's personal values and needs. It was exactly what the United Way donor consultants needed to increase annual giving and, even more importantly, create strong relationships and customer loyalty that would stand up against the pressures of a more competitive marketplace," explained Parks.

Deutch acknowledges that initially he "didn't believe that a sales process could apply to charitable contributions. After all, we're

selling intangibles, not a specific product. We're selling social responsibility, a brighter future, human dignity, respect, independence and self-reliance, stronger communities," said Deutch.

"Bob showed us that building relationships is the key to success, whether to selling a product or selling a vision. The Counselor process applies to any situation," he said. "Strategic Enhancement Group has been a great asset. Bob is definitely more partner than vendor. He's taken on our mission as his own and that commitment shows."

A Dramatic Departure

"The *Counselor Salesperson* approach was a dramatic departure from our traditional approach," said Deutch. "In the past we went in, made our case, asked for financial support and got it. There was no in-depth understanding of the donor's point of view because limited donor-centric need was surfaced."

Under the old system, the United Way conducted an annual six-week campaign that ended with a one-time request for financial support. Adopting the *Counselor Salesperson* process meant completely changing the group's mindset to focus on building long-term relationships and extensive discovery about the donors.

A core element of the *Counselor Salesperson* approach is an exhaustive discovery process designed to isolate critical client values, goals and interests based a series of probing questions.

"It took a while to exorcise our old habits. Our staff was used to ending every meeting with a financial request. It took a lot of discipline to focus on learning more about the donors and their personal values," he noted.

Strategic Enhancement Group introduced the *Counselor Salesperson* process to a small group of managers in August 2003 and to the remaining staff several months later. Parks then shifted his focus to identifying reinforcement and recognition opportunities and working with individual consultants to fine-tune their skills.

Building Bridges

Deutch said that the transition hasn't always been easy. Not everyone was comfortable with the new process and, initially, staff turnover was high.

Bill Marsella, a United Way Senior Donor Consultant, acknowledges having some reservations at first. "I could see how the

COMPANY PROFILE

Greater Twin Cities United Way creates a better life for us all by focusing on three key areas: Stabilizing Families, Helping Children Succeed and Empowering Healthy Lives.

We attack poverty on multiple, interconnected fronts to achieve lasting change. We LIVE UNITED by collaborating with partner agencies, corporations, community leaders and people like you.

United Way serves people living in or near poverty in nine counties: Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott and western Washington. Making a gift to United Way is the most effective way to help the whole community.

Our Mission: Uniting caring people to build pathways out of poverty, thereby improving individuals and the community.

Counselor approach would boost conventional sales but wasn't sure it would translate in a non-profit environment. I was wrong."

"The discovery process makes so much sense. The relationships I've developed since I started using *Counselor Salesperson* are stronger and the foundation is deeper."

Marsella offers several examples that support his belief. In one situation, Marsella met with a local business executive and, through discovery, learned that the executive's wife had a background in public finance and was passionate about the need for affordable housing. Recognizing that charitable giving is often a family decision, Marsella offered to arrange for the executive's wife to tour some of United Way's local housing initiatives and she eventually joined the board that made funding decisions. The executive has increased his gift substantially every year for the past three years and, as important, is a strong supporter of United Way programs.

“A lot of people and organizations are pulling at these donors. If we can keep them and their families engaged in United Way's activities by showing how our vision supports their personal interests, we'll go a long way toward building loyalty. That's at the heart of the Counselor Sales approach.”

BILL MARSELLA

Senior Donor Consultant, United Way

In another instance, Marsella used information learned during discovery to engage the support of a newly-relocated executive and his wife. In this case, the executive's wife had an advanced degree in education and was interested programs for at-risk youth. Marsella arranged several agency tours that eventually led to a board appointment. As a result, the family made a substantial contribution and, as important, the community as a whole has a chance to benefit from her expertise.

"Both situations stand out," said Marsella. "In fact, one of the executives still brings it up whenever we meet. A lot of people and organizations are pulling at these donors. If we can keep them and their families engaged in United Way's activities by showing how our vision supports their personal interests, we'll go a long way toward building loyalty. That's at the heart of the Counselor Sales approach."

A Common Foundation

While the transition was challenging, the results have been worth the challenges, Deutch said. Since individual donor visits began two years ago, gifts have increased five percent, compared with a loss of one percent where no discovery visits occurred. Three years ago, campaign consultants typically spent the majority of their time in the office, doing paperwork, administrative tasks and responding to telephone requests. Today, consultants spend the majority of their workday visiting donors.

And, said Deutch, the group shares a common language that allows them to address issues more efficiently. "Everyone understands 'Discovery.' I can ask about 'Ben Duffys' and everyone knows what I mean. We're all working from the same foundation."

The *Counselor Salesperson* discipline has helped managers identify critical skills and training gaps and is reflected in the group's hiring process. Today, managers focus on relationship skills rather than administrative and analytical skills when hiring potential consultants. In fact, many of the questions asked in the interview relate to the core competencies required by the *Counselor Salesperson* process.

"Bob was right. *Counselor Salesperson* was a perfect fit. It's all about relationships and building trust and so is the United Way," said Deutch.

To learn more about these concepts and how Strategic Enhancement Group, Inc. can help you in addressing these issues, contact us at (630) 377-4300, (888) 668-9382 outside of IL or StrategicEnhancement.com.