



# Beyond Marketing: Becoming a Constituent- Centered Organization

By Shelli Bischoff

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# BEYOND MARKETING: BECOMING A CONSTITUENT-CENTERED ORGANIZATION

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## **Introduction**

Engaged constituents are critical to an organization's success. Organizations that enter into long-term, mutually-beneficial relationships with their constituents maximize their potential to achieve results toward their mission.

Constituents are an organization's members, donors, volunteers, and partners—those people without whom the organization would cease to exist. Here the term “constituent” is used deliberately, for it is an integral element to the organization's strategy for success and sustainability.

Today's successful nonprofit organizations embrace marketing strategies to broaden their base or to create increased awareness in a competitive marketplace. This article demonstrates why sophisticated organizations will choose to shift their focus beyond marketing and become constituent-centered.

**Marketing is not a tool used to persuade the audience to purchase goods. Rather, it is understanding and satisfying the demands of the market within the parameters of mission and core business.**

## **Marketing**

Marketing is more than messaging, media, and branding. It is a deliberate, systematic process used to identify and analyze a group of people relevant to an organization's mission. Marketing defines the products, services, and outreach strategies that will appeal to a specific audience and inspire them to take action. In the private sector, this action is typically purchasing goods and services. In the nonprofit sector, this action is usually making a donation, becoming a member, responding to an action alert, or deciding to volunteer. In the public sector, this action might be changing individual behavior, influencing policy, or shifting the social norm.

Marketing is not a tool used to persuade the audience to purchase goods. Rather, it is understanding and satisfying the demands of the market within the parameters of mission and core business.

Further, marketing is not defining what an audience *should* believe in. Instead, it focuses on understanding the market's values and behaviors. Increased understanding enables an organization to eliminate obstacles while simultaneously increasing the benefits for people to take action.

Since resources of time and money are usually limiting factors, target marketing is essential. Defining market segments that are *most likely* to take the desired action enables an organization to design offerings and outreach strategies that will be more effective in reaching and engaging the audience. Nonprofit organizations and public sector agencies often want to reach large audiences because they believe that everyone *should* care about their cause or because they embrace values that drive them to be inclusive.

However, target marketing allows for a focused and consistent marketing approach to realize a higher return on investment.

With an understanding of the demographics and psychographics of the target market, an organization can employ strategies to engage the market segment. Organizations create value by providing an offering—whether it is the protection of land for open space or conservation purposes, the enhancement of leadership characteristics in young people, or the provision of shelter and food for people in need. Marketing reminds us that

communicating value consists of describing what an organization does as well as considering how an offering is packaged with clearly defined benefits.

**Core Constituents / Target Markets:** Those people who are necessary to the success of an organization. They are the people an organization serves or who are necessary in order for an organization to meet strategic goals in programs, marketing, and fundraising. They are an integral component, without which the organization would have little meaning. The core is the target market—those who care, or potentially care, enough about the organization or cause to take significant, meaningful action on its behalf.

**Market/Audience:** A portion of the population that has an interest, or potential interest, in the cause or organization. It is the population with whom the organization engages, or could engage, in a transaction.

**Market Segment:** A relatively homogenous sub-set of the audience, used for purposes of categorizing and defining the population in ways useful to the organization. Traditionally, markets are segmented by demographics, though segmentation by values, attitudes, and lifestyles (psychographics) is much more useful.

**Outreach Strategies:** The groups of activities to reach and engage the core constituency. Strategies include programming, services, direct contact, events, and earned media. Outreach strategies are more than an organization's message or communications plan.

**Public Relations:** Public relations is one aspect of an organization's outreach strategy. It includes the relationships that an organization has with its "publics" and is about creating a positive and strategic public image such that marketing can take place.

**Social Marketing:** The process of applying marketing principles to a special class of problems. It is designed to help social change agents influence people to take actions that improve their own welfare or that of the broader society.

**Sustainability:** Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an ongoing basis. Sustainability requires the infrastructure to carry out core functions independent of individuals or one-time opportunities.

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**The key to using marketing strategies for specific results is to align them with the target market and then to be consistent and constant when employing the strategies.**

A fundraising example will illustrate this point. In discussing ways to increase corporate support, it is often assumed that businesses want visibility for their philanthropic dollars. However, a marketing approach—which includes researching, targeting, and understanding the market—reveals that corporations define benefit in many ways. Offering the typical, “put your name on our brochure” to a corporation that values the subject matter expertise of an organization, rather than exposure to its members, would result in an unsuccessful grant request.

Marketing includes identifying both the features and benefits of an offering and the outreach strategies used to reach and engage the target market. Typically, outreach strategies include direct contact (personal or electronic), media relations, promotions, special events, advertising, social networking, and web 2.0 interactions. When an organization understands its markets, it is easy to prioritize outreach strategies and define the tactics that will have the greatest impact toward achieving results. For example, direct mail strategies work less well for a younger population while text messaging is less relevant to an older population.

Direct contact is critical for organizations of all sizes. For groups trying to reach a nationwide target market, direct contact is about mass customization. For a small local group, direct contact may involve arranging face-to-face meetings or organizing targeted group events.

Organizations also resonate with markets through price and access. If a particular target market is price sensitive or if services are delivered at times that are not convenient, no amount of outreach, promotion, or communication will result in the desired action. For example, an organization trying to reach working parents must deliver services in the evening.

The key to using marketing strategies for specific results is to align them with the target market and then to be consistent and constant when employing the strategies. Understanding the target market is to recognize that we do not live in a “one size fits all” world and realize that marketing strategies deserve updating as an organization’s understanding of the target market continues to develop.

For example, one organization had a long history of door-to-door canvassing for membership recruitment. Market research demonstrated that the target

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market was less likely to respond to canvassing than to opportunities for more meaningful engagement. An unwillingness of the organization to adapt its strategies inhibited it from broadening its support base.

Marketing concepts provide useful tools for organizations to be more effective in reaching a target market and prompting it to take action. As organizations master market research, tools, and tactics, they will be ready to move from marketing strategies to becoming constituent-centered.

### **Constituent-Centered**

Organizations will want to become constituent-centered if they find their marketing strategies effective but at a plateau, if they are operating in a particularly competitive environment, or if they find they are successfully reaching new markets but are not successfully *engaging* them in meaningful ways. Shifting an organization's focus from marketing to being constituent-centered will help it to achieve its next level of success.

While marketing consists of studying a target market in order to create successful strategies, being constituent-centered connotes developing a meaningful and engaged relationship with that audience. In everyday business terms, this means being customer focused—an idea that emerges from the customer relationship management (CRM) approach.

Why shift the focus from markets to constituents? Because constituents are so integral to an organization's success that it cannot survive without them. Gaining a more comprehensive understanding of an audience helps an organization design effective strategies to develop a more meaningful relationship with that audience and convert the individuals into loyal, long-term constituents.

Consider this simple example. In creating a meaningful relationship, think about the difference between casually dating someone and dating *the one* with whom you are interested in making a life-long commitment. For that special someone, you would likely pay more careful attention to their past and to their values. You might also want them to know you a little more intimately, and you would undoubtedly make them a priority in your life. How would you treat a donor differently if you thought of them as making ongoing, increasingly significant contributions over ten years, rather than as a prospect for a one-time \$100 donation?

**Being constituent-centered is as much a mindset as it is a set of activities.**

Constituent-centered organizations are more likely to have fully engaged and well-functioning boards, to have fiercely loyal volunteers and donors, and to have an active membership. Engaged constituents keep an organization “top of mind” and tell the organization’s story in social circles, within personal or professional networks, and on social media sites.

For example, during a focus group for a local nonprofit, a particularly vocal woman practically co-opted the meeting by raving about *another* community organization with which she was involved. She suggested it was the best organization in town because, among other things, the people were so friendly and their website was functional. Then she strongly encouraged everyone in the group to become involved with *that* organization. This is the kind of engagement an organization wants to engender!

Being constituent-centered is as much a mindset as it is a set of activities. It suggests that an organization is mindful of its constituents at all times—in *all* its activities, policies, and programs. If the organization is already successfully reaching target markets, a constituent-centered approach will provide the audience with reasons to stay involved. A constituent-centered organization cares about its constituents as much as it wants them to care about the organization and its cause.

## **Constituent-Centered Principles**

### **Two-way Communication**

Perhaps the most important constituent-centered principle is two-way communication, as opposed to one-way information sharing. Two-way communication requires astute listening and regular feedback. When people in organizations, communities, or relationships say there is a “communication issue,” they are generally not asking for more information—they are usually asking to be heard. The social networking phenomenon is an example of this desire to be seen and heard and to interact with like-minded people.

Providing opportunities for two-way communication is essential in today’s operating environment. Its use in the 2008 presidential election is evidence enough. In its simplest form, the campaign’s online giving system allowed donors to express what was important to them, and this action alone created a more meaningful connection to the candidate. Personalized email, text messages, and blogs can also help to facilitate dialogue with an audience of

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millions. What can your organization do *right now* to turn your one-way information sharing into an opportunity for two-way communication? What opportunities can you offer constituents to be seen and heard?

### Mutually Beneficial Relationships

The next level of two-way communication consists of building two-way relationships. Creating mutually beneficial relationships require the organization to know what is important to its constituents. It is necessary to provide an audience something they want or need within the scope of the organization's mission and programs.

One organization, for example, understood that their audience would be more likely to subscribe to a monthly fact sheet with information related to their own health and the environment, rather than pay for membership and receive a monthly newsletter reporting on the activities of the organization. The \$25 subscription cost was the same as the membership fee, but it was perceived by the constituent to be of greater value.

Successful resource development professionals intuitively understand mutually-beneficial relationships. This unique, yet dramatic, donor relations example demonstrates how to understand and have empathy for the constituent and their situation. A corporation pledged a sizable donation to an organization while mired in labor negotiations. Empathetic to the corporate budget scrutiny during the negotiation period, the organization *voluntarily* offered to forgo the pledged gift.

Their intent was to engender a long-term relationship in which each party truly cared about the other. The corporation was amazed! Shortly after the labor situation was settled, the company not only increased their donation, but also went on to become a loyal, long-term supporter.

### Every Individual Counts

In today's data-driven world, mass customization is not a luxury—it is a necessity! Every individual must be treated as a market of one; in nonprofit terms, every individual must be treated as if they were the most important donor, member, volunteer, participant, or client. Consider an online book retailer. When someone purchases a single book, the company suggests other topics that might be of interest to them. Also, consider a successful DVD rental provider. Their user-friendly system encourages ongoing and regular

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conversations with each individual customer. A simple “Thank you for sending this back, your next order will be there in two days...” fosters such extreme loyalty that it is a topic of conversation for many customers. These examples challenge organizations and public agencies to be more deliberate about the constituent data that is collected, managed, and used.

### Be Curious and Listen

The constituent-centered philosophy requires a shift from thinking, “What do you think about us?” to asking, “What do we know about *you*?”

Organizations spend a great deal of time and money conducting surveys that ask the constituent if they like the newsletter, services, or programs of the organization. There is significantly less time devoted to asking about the individual’s relationship to the cause or issue. A constituent-centered organization is immensely curious about their audience and they take every opportunity to find out more about them.

How can an organization become a more efficient listener? Requesting board members and volunteers to fill a market research role is an underutilized strategy. Sometimes market research simply requires probing and listening. While board members are accustomed to asking for *talking* points, it would be best to suggest several *listening* points—the two or three questions that could be addressed to individuals and group audiences. Perhaps ten minutes of every board, volunteer, and staff meeting could then be allocated to discussing, “What did you learn about our constituents or potential constituents this month?” If 15 board members each listened to five people every month for a year, that’s solid qualitative research with a sample set of more than 800 people!

A constituent-centered organization both listens and translates information into action. It will ask, “What are the implications for us, and how should we do our work differently to best resonate with our constituents?” Listening not only helps to learn more about the constituent, but also helps to identify the language, style, and context that will best resonate with them.

For example, when a group of people were asked what they liked most about open space (instead of what they liked about the organization whose mission was to preserve that open space) the interviewees spoke mostly about lifestyle. In contrast, the organization was apt to use phrases such as “natural communities” and “habitat.” In fact, the organization’s board disliked the

### Questions to Learn More about Your Constituents:

What are your interests relative to (insert your cause or focus—not the organization)?

Why is (the cause) important to you and your family?

How could (the organization) be of most service to you, your family, or community relative to (the cause)?

word “lifestyle.” By listening carefully, the organization learned that in order to resonate with their audience, “lifestyle” was the term to use. Not one person in dozens of interviews spoke of natural communities!

### Meet a Need

Businesses are successful when they create products or services that meet some unmet need or make the life of the consumer somehow more convenient or appealing. Similarly, organizations engage constituents when they meet a need—when they give people a way to take action on something in which they believe. It can be more difficult of course, when the need is to change an ingrained behavior such as encouraging constituents to stop smoking, to eat better, or to recycle. However, the principles are the same. Successful social marketing campaigns eliminate obstacles and increase benefits for people to create new habits. Understanding what those obstacles or benefits are depends on how much is known about the audience. The more constituent-centered an organization is, the more likely it is to know the audience well.

### Intimate Understanding throughout the Organization

Being constituent-centered must involve everyone in an organization—the staff, the board, and the volunteers. If being constituent-centered is only the task of the membership director, it won’t work! The entire staff must recognize that addressing constituents is not an interruption to their work, but is in fact what makes their work possible. In one large national organization, being constituent-centered meant the entire staff understood that the audience (in this case tens of thousands) was not a homogeneous group, but rather several segments with diverse behaviors and lifestyles relative to the cause.

### Tools for Creating a Constituent-Centered Organization

#### Start with the Core

The first thing an organization can do to be more constituent-centered is to start with the core—those people already connected to the organization. Review the type of information that is already available and analyze what is currently known. Then define the three or four key questions. Develop constituent intelligence, a system to better understand the audience as individuals or as relatively homogeneous segments. Request that board, staff, and volunteers pay more attention to the constituents with whom they come in contact and provide regular opportunities for them to share their findings.

**Being constituent-centered must involve everyone in the organization.**

Also, assign each board, staff, or volunteer a list of five people per month to call for a short conversation. The list may consist of individuals who have given more than \$250, anyone who has given \$50 for five or more years, or any new donors. Share and track this information. What are the emergent themes?

In addition to personal contact and observation, the mass survey or more sophisticated data mining techniques will create a deeper understanding of the audience. A large global nonprofit is relatively famous for being one of the first to use social marketing techniques to increase donations. With some data mining and research, they recognized that a segment of members had quilting as a common hobby, and for whatever reason, quilters are avid social networkers. The nonprofit used its own members' social networks to reach a much broader base than it would have otherwise.

### Go Beyond the Thank You Letter

A constituent-centered organization thinks of their constituents all the time, not just during the annual appeal. How can services be delivered to afford the greatest opportunities to engage constituents? Hosting one or two more special events or having three or four more volunteers answering phones won't work. What will work is truly looking at every aspect of the organization and understanding the potential "touch points" with the constituents.

**How can services be delivered to afford the greatest opportunities to engage constituents?**

A December 2008 *Chronicle of Philanthropy* article noted that 69% of people stop giving or decrease donations because they do not feel connected to the organization. Recognize that connection is not just the thank you letter and quarterly newsletter. Twenty-first century organizations need to be more sophisticated about outreach and connection. At a minimum, websites must be constantly updated and interactive—people need a reason to visit the website on a regular and ongoing basis. Depending on the scope of the organization and the audience, it is also becoming a necessity to have a social networking presence.

Consider meaningful interactions with constituents on a regular basis. The more knowledge an organization has about its core constituents, the easier it is for it to customize ways for individuals or groups to be more connected. Consider providing more opportunities for board, staff, volunteers,

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members, donors, and participants to meet one another (live or virtual) and talk about what they have in common—the organization.

### Reach Beyond the Core

Simply by becoming more constituent-centered, core constituents will begin talking about the organization, thereby serving as an outreach vehicle. And if the constituent-centered mindset is embraced throughout the organization, it also will ensure that people who contact the organization for the first time will feel welcome and engaged. Consider the example of the contributor who donates a sizable, unsolicited gift and receives a generic thank you letter several months later. What difference might it have made if a staff member, board member, or volunteer had called to say thank you, and more importantly, engaged the donor in a conversation about what compelled them to contribute? It would be even better if the caller extended an invitation for the donor to visit and perhaps be more involved—certainly this would greatly surpass the annual appeal letter a year later!

Being attentive to trends among constituents will help an organization become more aware of opportunities for reaching new audiences. Analyzing an audience's psychographics rather than just its demographics is a more sophisticated method of segmenting potential constituents. It will unveil how to find and connect with new audiences.

What is the organization's strategy for being in proximity to new constituents (either in person or online)? And once someone is introduced to the organization, how does the organization ensure that the person will become connected in a meaningful way?

Organizations reach hundreds of people but repeatedly miss the opportunity to turn them into constituents. Set a goal: for every 100 people that come in contact with the organization (through an event, a press release, a conversation, a service), turn 30, 40, or 60 into loyal constituents. What would that process look like? Every contact is an opportunity to engage with the constituent.

### Engagement Strategies

Engagement strategies depend on the audience and on the organization. The strategies should be developed to reflect the principles of constituent-centered organizations. While it is difficult to suggest a check list, there are

some tools that an organization can use to create their own engagement strategies.

### The Constituent-Engagement Path

The engagement path is a great exercise for board or staff. It helps to rethink and redesign the organization with a constituent mindset. Literally, draw a path from the first time someone reads about the organization in a local newspaper (or hears about it from a friend) to the end point—their status as a loyal, engaged constituent. What are the touch points and what can be done at those points to foster deeper engagement? Along the path, where are the opportunities, or obstacles, for engagement? How would the constituent draw this picture from their perspective? Where are the gaps and how will the organization close those gaps?

**What can you do at each touch point to create a more meaningful and loyal engagement?**

### Training

An important strategy for all organizations, regardless of size, is to train staff, board, and volunteers. The training has three primary components. First, ensure that everyone understands the organization's constituents—who they are and what they care about. Second, confirm that they understand what the organization's role is in engaging the constituent—what are the opportunities for creating a meaningful connection? And third, make sure everyone knows how to carry out their role in public relations in order to build relationships and create a positive image for the organization.

One national organization went so far as to create videos depicting caricatures of each of their distinct constituent segments. After watching the videos, the staff understood that not all members related to the organization in the same way. Then, to further emphasize the importance of the constituent to the organization, constituent-segment managers were assigned

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to track, understand, and make recommendations to better engage their segment.

### The Center of Attention

In constituent-centered organizations, the constituent is *the* topic of conversation at staff meetings and in work sessions. What's more, constituent-centered organizations conduct ongoing research on their audiences—either through personal anecdotes, through a systematic collection of information, or through secondary literature. For example, there is a wealth of information in popular literature about connecting with 18 to 30 year olds. Organizations might also consider using constituent advisors. One organization brought in individuals who represented the organization's constituents to answer questions of the membership and fundraising staff. Others trying to reach young or corporate audiences create advisory roundtables comprised of those segments.

### Stories

The following accounts provide examples of excellent constituent-centered organizations. One is a statewide organization providing financial literacy for youth, another is a regional conservation organization, and the last is a national advocacy organization.

### The Financial Literacy Organization

This nonprofit is the epitome of a constituent-centered organization. From the style of its top executive, to the passion and enthusiasm of the part-time program staff, all members of the organization exhibit a constituent-centered mindset. The organization's annual event features young, financially literate entrepreneurs rather than event sponsors. After the event, the board members call every single one of the *one thousand* attendees and thanked them for their participation. This personalized attention, which takes only a few hours of each board member's time, sends a strong message to the supporters that they are important and not taken for granted. The organization also has a youth advisory board. It provides a leadership development opportunity for carefully selected youth and serves to keep the organization in touch with its audience. The long-term, loyal commitment of the youth board is facilitated by an active alumni group. Several of the young leaders have gone on to work at major corporations and foundations and maintain a strong affinity for the organization.

**One indicator of being more constituent-centered is the “before” and “after” versions of the strategic plan.**

### The Regional Conservation Organization

Like many conservation organizations, this east coast regional nonprofit placed precedence on the natural resource over people—even though as a large, recreational preserve with several thousand visitors per year, the hikers, bikers, dog walkers, and birders were clearly an audience. By changing their opinion of the visitor from a “threat to the resource” or “a source of revenue” to an important constituent, the organization has become more focused. One indicator of being more constituent-centered is the “before” and “after” versions of the strategic plan. In the early plan, the goals of this organization were entirely internally focused. The constituent-centered plan stated goals in terms of the value provided to constituent groups. Guess which plan reaped greater success? Programs were modified or recreated to better engage the audience, and the results were tangible. The organization not only recovered from a deficit, but also greatly exceeded its fundraising goals. This success enabled staff compensation increases! Embracing constituent-centered principles helped the organization to broaden its base of members and receive several notable awards and commendations.

### The National Advocacy Organization

In the simplest example, the national advocacy organization changed the theme of its website from “Look what we are doing” to “Here is something you are interested in” and saw a dramatic increase in membership renewals. It also redefined constituent segments to reflect the fact that not all of its several hundred thousand members were exactly alike. And, the marketing department undertook a campaign to make every staff person a constituent-manager. In sum, a heightened focus on the audience and an adaptation of programs, services, and appeals to pay greater attention to the constituent not only dramatically changed the tone of the organization, but has also reaped financial rewards.

### Conclusion

Translating a constituent-centered mindset into specific actions and strategies is based on two easy precepts:

1. Know how the constituent relates, reacts to, or thinks about a message or action. An organization can only be constituent-centered by intimately understanding who the constituent is, what is important to them, and how they relate to the issue.

**Constituent-centered organizations are more potent, sustainable, and successful at achieving results towards mission.**

2. Consistently consider what the organization has done for the constituent “lately.” An organization must work to maintain its relevancy and resonate with the constituent. Opportunities for connection must be meaningful and frequent.

Recognize that everyone in an organization must be constituent-centered. With a focus on the two precepts above, the constituent-centered mindset will quickly integrate into everyday business affairs and define the organizational culture. The organization will likely forget there was a time when the staff could not describe the core constituent.

Constituent-centered organizations have donors, members, volunteers, and participants continually approaching them. They are indispensable to both their constituents and the community in which they operate. Constituent-centered organizations are more potent, sustainable, and successful at achieving results towards mission.

### About the Author



Shelli Bischoff is the president and founder of Conservation Impact and Nonprofit Impact. She has 30 years of experience in nonprofit and public management, planning, marketing, and organizational development. She has provided technical assistance and consulting services to thousands of nonprofits, public agencies, and small businesses throughout the country.

Shelli is a much sought-after consultant and trainer known for her focus on outcomes, her passion for organizational impact, and her dynamic and candid style. She is a strategic thinker who gets to the core of issues, creates practical solutions, and inspires clients to achieve greater impact than they could have ever imagined.

Shelli is currently an adjunct faculty member at the Colorado School of Public Health, previously served as adjunct faculty in the Regis University Master of Nonprofit Management Program, and has been a visiting professor at College of the Atlantic. She has held several nonprofit management positions, created successful, revenue-generating nonprofit ventures, and has served on nonprofit boards. She holds a Master’s of Public Administration from the University of Colorado.



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