JUST TOUCHING BASE
How Customer Service Can Serve Your Nonprofit

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What is a Customer?
“someone who buys goods or services from a business”
— Merriam-Webster Dictionary

• Does this definition work for nonprofits?
• How are nonprofits different from for-profits?
Defining the Customer

• Nonprofits exist to serve others
• “Customers” are any stakeholders supporting the mission of your nonprofit
• **Who does this include?**

Defining the Customer

• **Clients (consumers)** – served by the nonprofit
• **Staff** – ensure the continued operation of the nonprofit
• **Volunteers** – support the work of the nonprofit
• **Donors** – ensure the continued survival of the nonprofit
Why Do Nonprofits Need Good Customer Service?

- **Complexity** - several groups of “customers”
- **Connectivity** – nonprofits aren’t immune to negativity

Customer Service & Risk Management

- **Interest** – Loss of interest in your nonprofit & its mission
- **Communication** - Failure to communicate the value added of your nonprofit’s programs and activities
- **Under-Appreciation** – donors look to donate to other nonprofits due to a lack of outward appreciation
Customer Service & Risk Management

- **Marketing** – clients are unaware of new programs and services provided
- **Training** – staff & volunteers don’t have the information needed to be successful stewards of your nonprofit’s mission
- **Reputation** – a negative perception of your nonprofit’s work & activities is affecting your reach

Managing the Risk

- **Interest**
  - Engage customers in the work and activities of your nonprofit (social media campaigns, ads, events & outreach)
- **Communication**
  - Reach out to stakeholders and show them how your work adds value, and why you need them for success
Managing the Risk

- **Under-Appreciation**
  - Have a plan for donor, client & volunteer retention; remember to be thankful for those who assist in the mission-critical work & success of your nonprofit

- **Marketing**
  - Reach out to your community and past supporters

Managing the Risk

- **Training** – give your supporters all the information they need to be as effective as possible

- **Reputation** – proactively manage your reputation by having an online presence, having positive interactions, and helping your community
Evolution of Customer Service

- **Immediate access, anytime**
  - Social media
  - *Self-help:* Online forms, applications & resources

- **Customer-centric relations**
  - Personalized experience, customer-driven
Evolution of Customer Service

• **Ability to go elsewhere**
  - Ease of finding alternatives, changing service providers or organizations, and shifting focus after a bad experience

• **Peer review**
  - One unhappy person can change the community’s view of your organization (social media, websites, word-of-mouth)

Customer Service

**DOs & DON’Ts**
Customer Service DOs

Tips to help you cover all your bases

Create a Customer Centered Culture

• Internal customer care is just as important as external customer care
  – Conscientious work, timeliness and accuracy
• Good service involves demonstrating excellence and good work in all tasks associated with the nonprofit
Create a Customer Centered Culture

• Even with the best strategic plan, without a positive culture in your nonprofit, you’ll have difficulty working toward mission-success

Plan to Exceed Expectations

• Emphasize that all work done by your nonprofit is connected

• Acknowledge that every person involved with your nonprofit will play a role in how it is perceived
Plan to Exceed Expectations

• Give your customers the ability to get in touch with you
  – Make it easy
• Always, always, respond to questions and requests from your customers
  – Have a plan for how long you have to respond

Equip Your Staff & Volunteers

• Provide **orientation** and **training** focused on the goals of your mission and the important role each person plays
• Give others the ability to be the most effective advocates for your nonprofit
Equip Your Staff & Volunteers

• Provide training and information to help your staff and volunteers be more effective & efficient
  – Policies
  – Multiple channels of access (online, phone)
• Emphasize the importance of consistently high-quality customer service

Customer Service DON’Ts

Avoid striking out with your customers
DON’T

Set Aside Difficult Questions

• Putting off difficult tasks won’t make them any easier, and it may frustrate your customers
  • Give the best possible response, as soon as you can

DON’T

Avoid Accountability

• If you make a mistake, acknowledge it, and learn from it
  • Be proactive and reach out to your customers before they need help
DON’T

Overlook Customers Working For You

• Your volunteers and staff already support your mission—keep them on your side by showing appreciation and giving them the support they need

Customer Service HOMERUN

• DO: create a customer-centric culture, plan for success, and provide training and support to your customers

• DON’T: set aside the hard questions or projects, avoid accountability for your role, or overlook the customers who already support your nonprofit’s mission