



Addressing Advancement's ~~Problems~~ Opportunities





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Featuring:

Nick Linde



**The University of
Nebraska Foundation**

evertrue.com/podcast



#1

Highest-rated advancement software



1,500+

Advancement & nonprofit partners

75+

Of the Top 100 US News & World
Report Universities



Since launching the DX program

- ✓ In their first 30 days, DXOs held 69 donor visits and uncovered 7 new estate gifts
- ✓ DXOs are logging more than 400 weekly touchpoints
- ✓ On pace to meet with more than 500 donors this fiscal year
- ✓ Closed more than \$2.9M in gift revenue in less than a year
- ✓ Generated an additional \$1.2M in pipeline revenue via MGO leads & referrals
- ✓ Many more fund agreements in the works!

As of Dec. 21, 2021

Think about how we're treated everywhere.



airbnb



TESLA



STARBUCKS™

jetBlue



 wayfair®



Instagram

NETFLIX

A man with a beard and glasses, wearing a dark blazer, is seated at a table in a cafe, gesturing with his hands while talking to a woman with long brown hair. The woman is holding a tablet. On the table are a laptop, a cup of coffee, and a small container with sugar and salt. In the background, there is a large abstract painting of a wave and a textured wall.

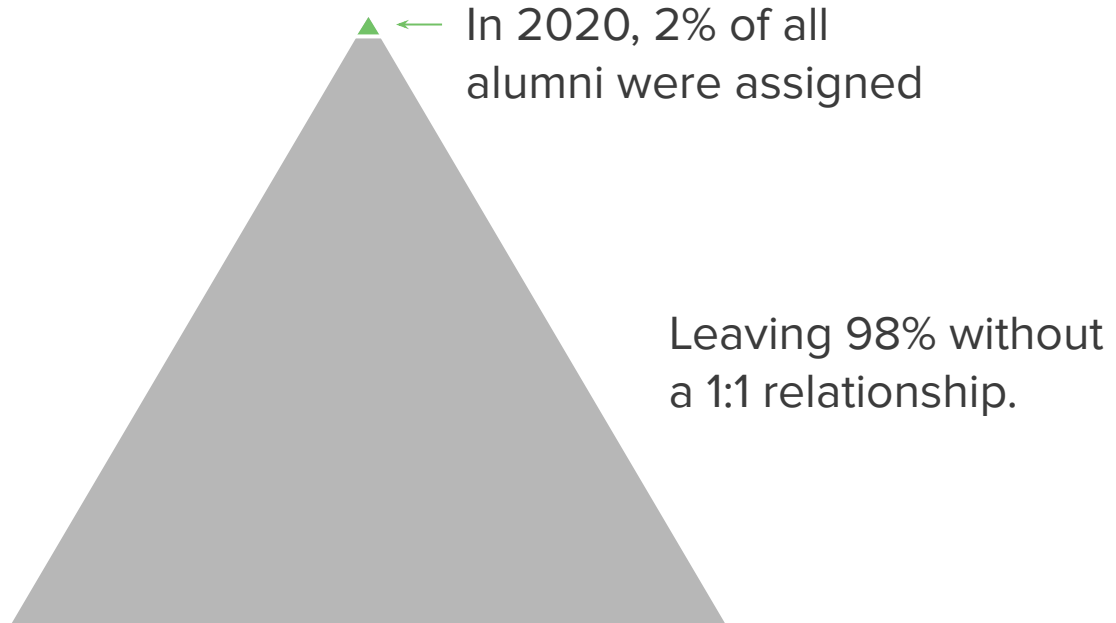
**We do 1:1 donor
engagement really well**

~~Problem~~

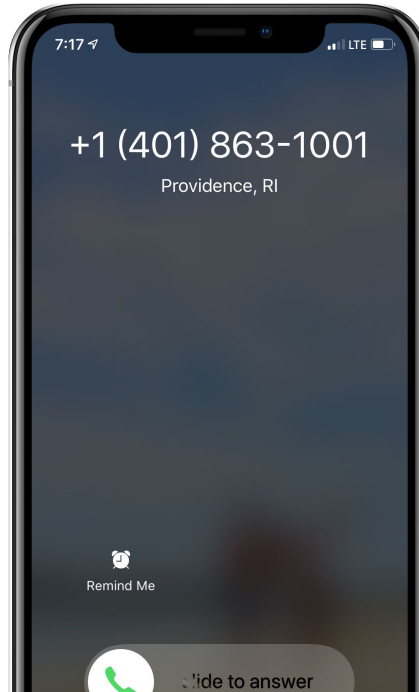
**Opportunity #1:
Donor Pipeline**



Too few get that 1:1 experience



And if you aren't in the top 2%...



The typical gift officer...



**Contacts 45.5%
of their portfolio
each year**



**Visits with 33
assigned prospects
each year**



**Spends less than
60% of their time
on fundraising**

Sources: Blackbaud, EAB

~~Problem~~

Opportunity #2: Talent Pipeline



Advancement's talent crisis



Recruitment

51% of fundraisers wanted to leave their jobs.



Onboarding

It takes ~3 years for an MGO to become fully trained and productive.



Retention

Average tenure is 18 months. It costs \$127k+ to replace them.



Competition

98% of people want the option to work remotely.

Sources: EAB, Chronicle of Philanthropy, Cygnus Applied Research

Meanwhile, in advancement...

After Labor Day, our advancement leadership expects us to be in the office:

5 days per week

45%

3 days per week

22%

Totally flexible

22%

I'm not sure yet

12%

A person with dark hair, wearing glasses and a yellow sweater, is shown in profile, looking at a laptop screen. The laptop screen displays a video call with a man in a white turtleneck. The background is blurred, showing an office environment with other screens and papers.

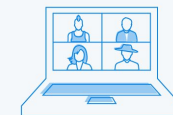
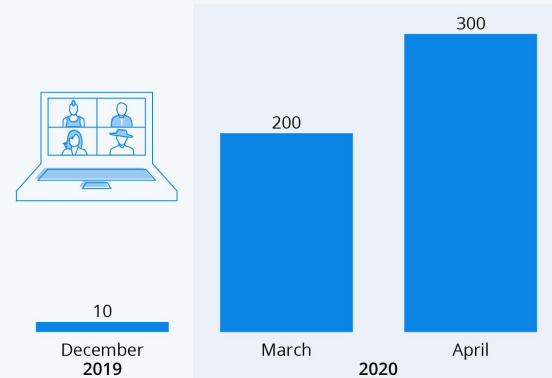
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The 2022 ~~Problem~~ Opportunity: Donor Experience



Zoom Grows Exponentially

Number of daily users in Zoom meetings (in millions)



Sources: The Verge, Zoom

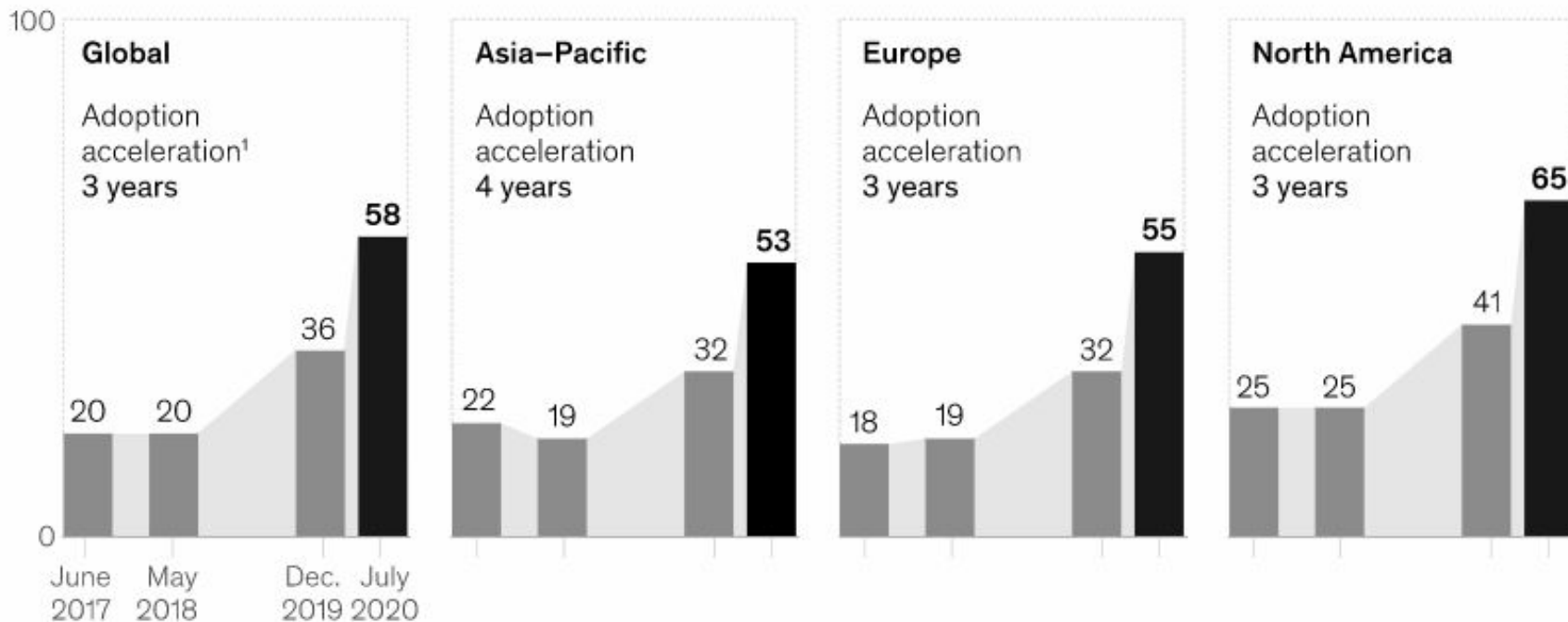


statista


Average share of customer interactions that are digital, %

■ Precrisis

■ COVID-19 crisis




McKinsey
& Company




“Our normal shouldn’t be fundraising for the 1990s. It should be fundraising for the 2030s. We needed this disruption.”

- **Matthew White, Utah State University**



“We are ready for Advancement 2.0 with new and different approaches and innovations. This is moment of crisis will help us get there.”

- Julie Rehm, Cleveland State University



“If you asked me three years ago if I’d ever close gifts over Zoom, I’d say no way. But, I just closed two of the largest gifts in the history of the university over Zoom.”

- Mike Bacon, Trinity University

Donor Experience Program: Customer experience meets fundraising



We coach teams of donor experience officers who deliver **phenomenal 1:1 experiences** to portfolios of 1,000+ of your best, unmanaged prospects

Best-in-class tools

Our own software and third-party integrations
allow DXOs to connect with hundreds of
people each month.



thankview



zoom



SalesLoft

Panel Discussion



Brent Grinna



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TOPIC 1:

So, why take this approach?

TOPIC 2:

**Let's talk about the org chart.
Where does this fit in?**

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TOPIC 3:

**Leah has tons of donor stories.
Let's hear one.**

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TOPIC 4:

What is polite persistence?

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TOPIC 5:

Let's talk about internal buy-in.



“We’re not in this to have all these wins for ourselves. We’re part of a team and a much bigger development organization University-wide.”

– Nick Linde

TOPIC 6:

An important puzzle piece: Teddy, EverTrue DXPM

(Donor Experience Program Manager)

A man with short brown hair, wearing a light blue button-down shirt, is standing in a lush green cornfield. He is looking upwards and to the right with a thoughtful expression. The corn plants are tall and vibrant green, filling the background and foreground. The overall tone is hopeful and contemplative.

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TOPIC 7:

What does the future look like?

The DX approach has redefined frontline fundraising across the country



Grow with us

**All the resources you
need to continue the
DX conversation**



evertrue.com/agb