Relationships & Constituent Journey Mapping

A framework for delivering excellence in constituent engagement

build
transforming nonprofits

Peter Mirus

Partner, Build Consulting

build
transforming nonprofits

My background by the numbers

20

Years serving nonprofits

100+

Clients

3

Primary areas of expertise

build
transforming nonprofits

Invested

Work exclusively with nonprofit organizations; have served over 1,000.

Strategic

Help our clients make data and technology decisions that support mission.

Collaborative

Empower you to make informed choices.

How Build leads in the social good sector:

Assessments and Roadmaps

Software Selections

Implementation Support

Interim or Part-Time CIOs

Outsourced CRM Management

build
transforming nonprofits

Tomorrow's best nonprofits will use technology to transform themselves... and the world.

build
transforming nonprofits

And yet, more than 50% of nonprofit technology projects fail.

The technology moves forward... but the organization does not.

build
transforming nonprofits

OO
+ NT
=EOO

Transformation
is critical to
your success.

Successful transformation involves...

Leadership and Governance

Operations

Process

Data

Technology

build
transforming nonprofits

What is constituent journey mapping?

Getting to know our constituents

build
transforming nonprofits

Constituent journey mapping is…

Documenting the path each constituent walks with your organization, throughout the entire lifecycle of that relationship.

Why do journey mapping?

It defines how your organization functions

build
transforming nonprofits

Applications for journey mapping

- Branding
- Marketing
- Development
- Programs and Projects
- Volunteer Management
- Client/Case Management
- Accounting
- Human Resources
- *You Name It*

The Org's "Why"

Support a leadership transition +

Increase operational effectiveness +

Develop and better support relationships +

Org-wide collaboration and knowledge sharing +

= Improved mission impact

Team members' "Why"

What are your top-of-mind priorities and interests?

build
transforming nonprofits

Who does the mapping?

Everyone needs to be engaged at some level

build
transforming nonprofits

Who will do this work?

1. A cross-functional team that provides data leadership and guidance to the rest of the organization
2. The mapping team solicits input from subject matter experts in departments, programs, and teams
3. The mapping team works with the organization's leadership to make sure key strategy, policy, and investment decisions resulting from the mapping are mutually understood and sponsored
4. At the end of the day, all the organization's stakeholders will have some level of engagement from this mapping team

build
transforming nonprofits

Who are our constituents?

All who provide or receive a benefit

build
transforming nonprofits

Our Use Case

- National organization performing research, training and technical assistance, advocacy, and events pertinent to improving youth services
- Over 65 full time equivalents (FTEs) working across three major business units
- Working to address brand and marketing opportunities associated from growing through mergers
- Selecting unifying collaboration, productivity, CRM, and ERP platforms to unite all business units on common policies and best practices

Thinking Through Constituents at all Levels

THE CONSTITUENT BENEFIT CONTINUUM

Basic Benefit

What you do for Constituent X

End Benefit

The immediate result (benefit) of performing what you do for Constituent X

End-End Benefit

What Constituent X can do differently/ better as a result of that benefit

Thinking Through Constituents at all Levels

THE CONSTITUENT BENEFIT CONTINUUM: *EXAMPLE*

Basic Benefit

Delivered a training

End Benefit

Client better able to measure program performance

End-End Benefit

Client able to improve delivery and impact of youth services

Constituent Groups: Providers and Beneficiaries

- Providers
  - Staff
  - Consultants
  - Volunteers
  - Board of Directors
- Beneficiaries
  - Program Participants
  - Project Clients
  - Funders
  - National Meeting Attendees

Constituent Groups Brainstorming – End of 1st Session

- **Staff**
  - Project leads
  - Other staff
  - Budget holders/managers
  - Applicants/prospects
- **Consultants**
  - Subcontractors
  - Independent contractors
  - Sub-grantees
- **Banks and other financial institutions**
- **Licensees of our programs**
- **Funders**
  - Foundations (Local and National)
  - Foundation Associations
  - Corporate Funders
  - Government Agencies
  - Nonprofit orgs sponsoring or awarding projects (primes)
- **Members of various networks** (named networks that we manage and own)
  - Network A
  - Network B
  - Network C
- **Clients (service recipients)**
- **Product consumers**
- **Idea consumers (beneficiaries of the org's thought leadership)**
  - Newsletter subs
  - Website visitors
  - Social media engagement
- **Legislators**
  - Congress
- **Event attendees**
  - Center Trainings
  - Kickoff certification processes
  - National Meeting
  - Lots of programs host trainings, meetings, convenings, webinars, etc.
- **Partners**
  - Project and initiative
  - Advocacy
  - Research
  - Thought partners
- **Board of Directors**
- **Vendors**
- **Families and Children (end-end benefit)**
- **Researchers**
  - **Researcher A**
  - **Local evaluators**
  - **Universities that do related research**
- **Associations**
- **Fiscal sponsor relationships**

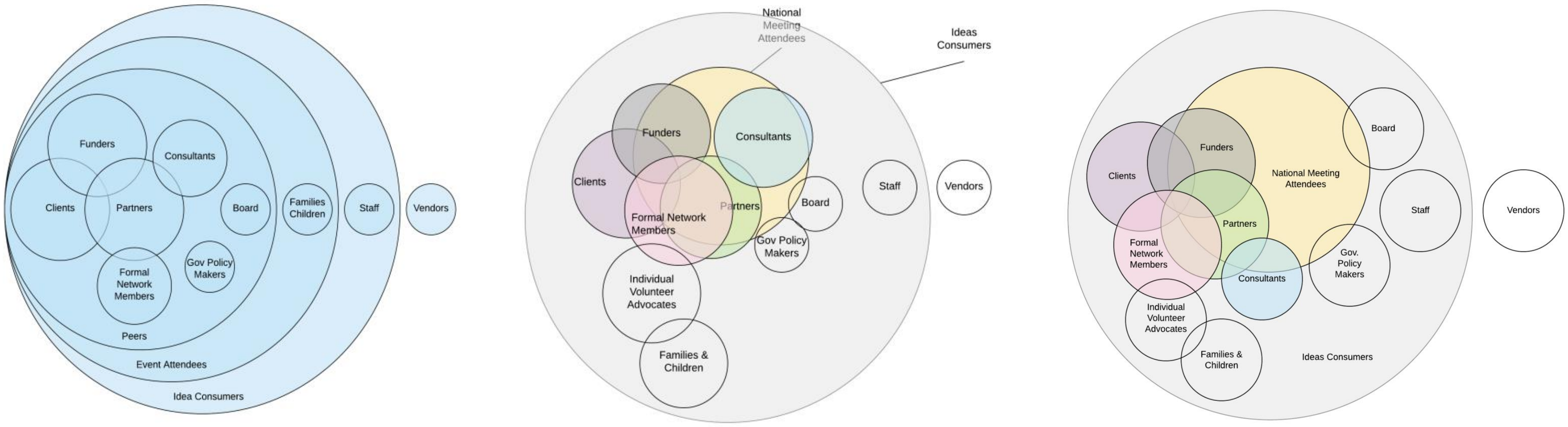
Constituent Groups Brainstorming – End of 2nd Session

- **Staff** (full and part-time)
- **Consultants** (orgs and individuals)
- **Funders**
- **Formal Network Members**
- **Clients** (Ind Persons, Ind Orgs, and Networks/Convening Orgs)
  - Program Licensees
  - Service-Only
  - Product-Only
  - Solutions (Bundled services and products)
- **Peers** (Organizations / Individuals / Competitors)
- **Government / Policy-Makers**
- **Event Attendees** (national meeting, trainings, orientations, meetings, webinars, etc.)
- **Partners** (collaborators a proj or initative)
- **Board of Directors**
- **Vendors** (Goods and Services)
- **Families and Children** (end-end benefit)
- **Idea Consumers**
- ~~Researchers~~
- ~~Associations~~
- ~~Fiscal Sponsees~~

Constituent Groups: Definitions

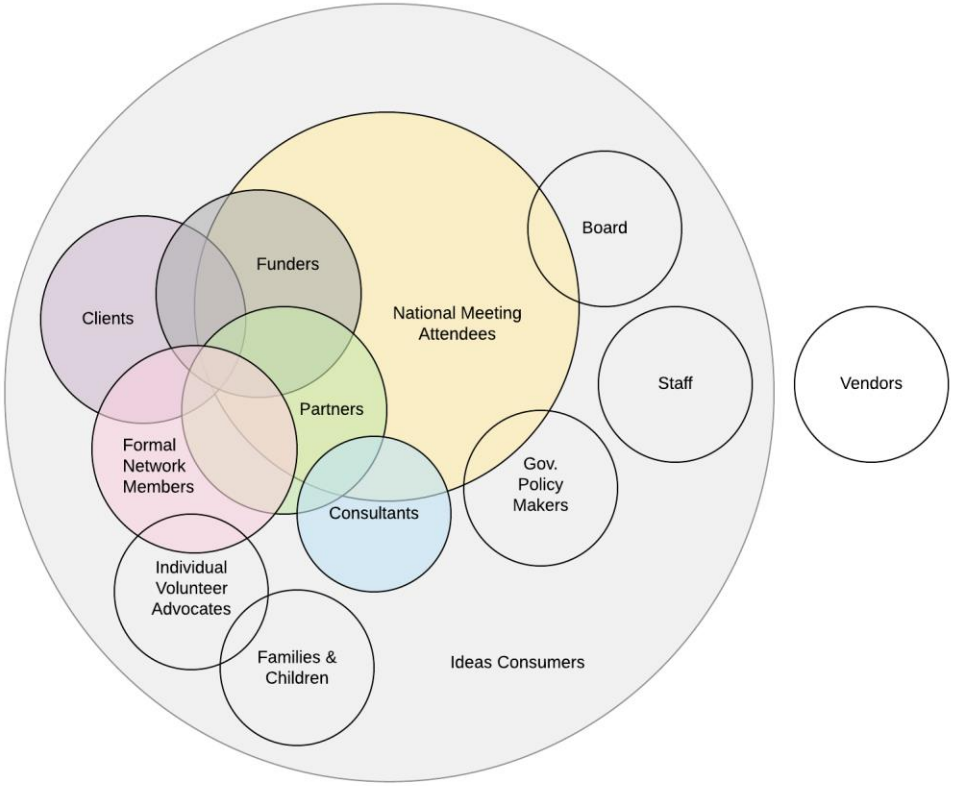
- **Clients** - Entities and individuals who provide funds to the Org in exchange for goods and services that are delivered to them directly as the beneficiary.
- **Staff** - Individuals employed by the Org in either a full or part-time capacity.
- **Partners** - Entities and individuals that collaborate with the Org on common interests.
- **Consultants** - Individuals that provide services, to the Org, to the benefit of clients.
- **Funders -** Entities and individuals who provide funds to the Org in exchange for goods and services that are delivered primarily to a third-party beneficiary.
- **National Meeting Attendees** - Individuals that participate in the Org's annually hosted national convening.
- **Formal Network Members** - Participants of member-based learning communities organized by the Org.
- **Government Policy-Makers** - Members of government that are developing, interpreting, and implementing policy.
- **Idea Consumers** - Recipients of the Org's knowledge and expertise.
- **Individual Volunteer Advocates** – Members of the general public that the Org encourages to contact policy-makers.
- **Vendors** - Entities that provide goods and services directly to the Org.
- **Board of Directors** - A governing body of individuals selected by the Org to serve as a collective of advisors who provide oversight.
- **Families and Children** - The intended beneficiaries of the Org's mission.

Constituent Groups: Overlap Modeling

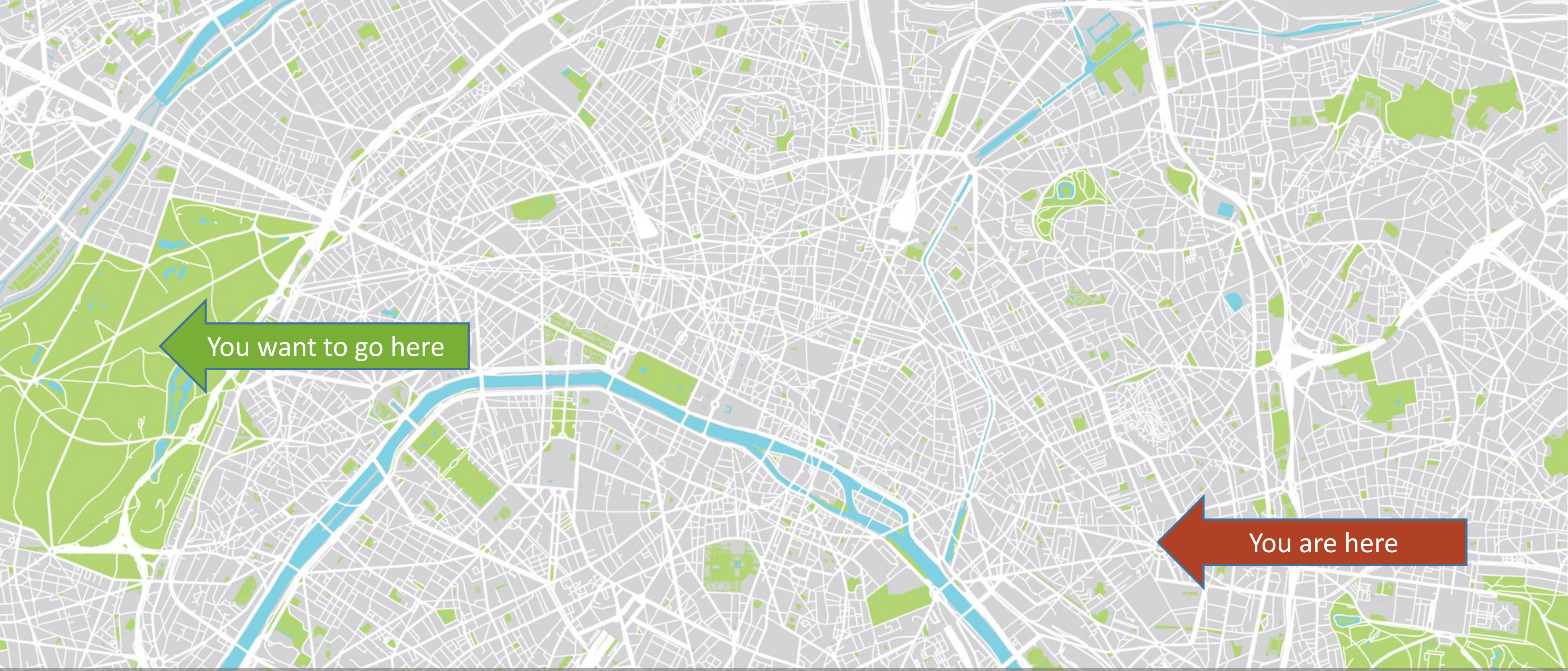


build
transforming nonprofits

Constituent Groups: Final Overlap Model



build
transforming nonprofits



What journeys require investment now?

Relative to org's strategic priorities and current position

build
transforming nonprofits

Constituent Groups: Prioritized by Biz Importance

1. Clients
2. Staff
3. Partners
4. Consultants
5. Funders
6. National Meeting Attendees
7. Formal Network Members
8. Government Policy-Makers
9. General Idea Consumers
10. Individual Volunteer Advocates
11. Vendors
12. Board of Directors
13. Families and Children

Constituent Groups: Journeys Supported in 1st Phase

1. Clients
2. Staff
3. Partners
4. Consultants
5. Funders
6. National Meeting Attendees
7. Formal Network Members
8. Government Policy-Makers
9. General Idea Consumers
10. Individual Volunteer Advocates
11. Vendors
12. Board of Directors
13. Families and Children

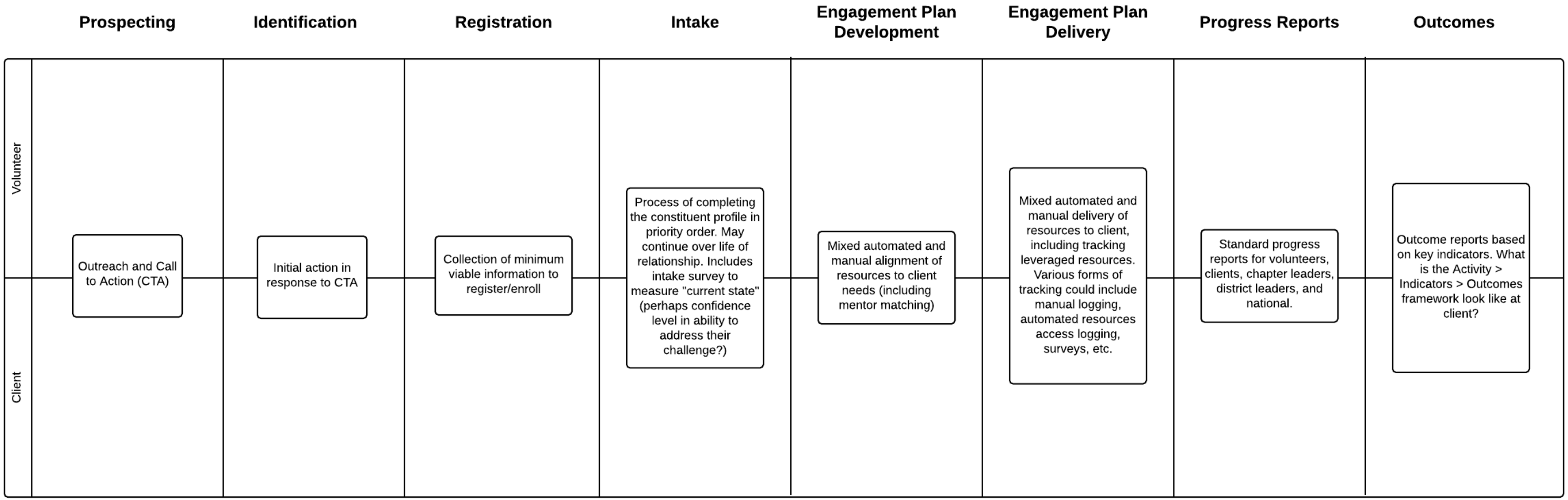
First Platform Implementation Phase

Crafting the journey framework

A vision of how to describe journeys that works across all groups

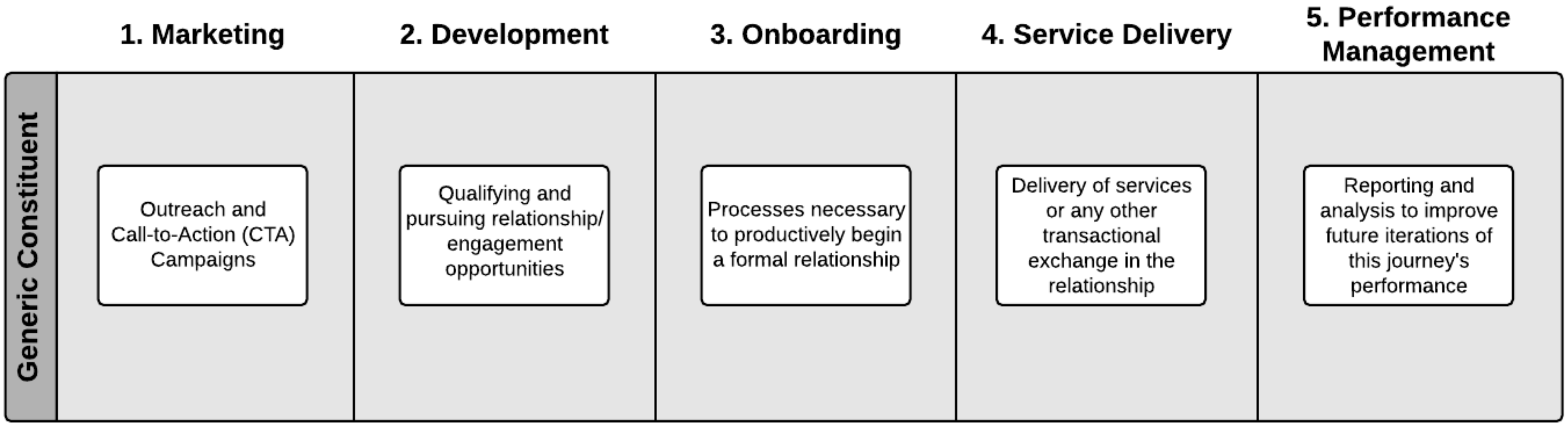
build
transforming nonprofits

Constituent Journey Mapping: Sample Framework (Complex Human Services Use Case)



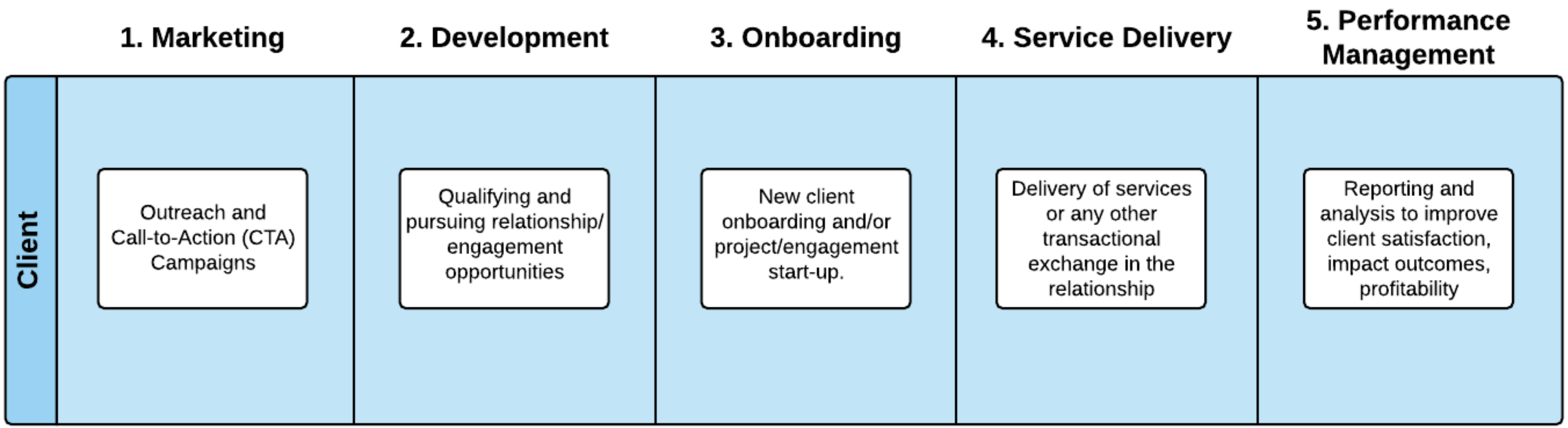
build
transforming nonprofits

Constituent Journey Framework (Typical)



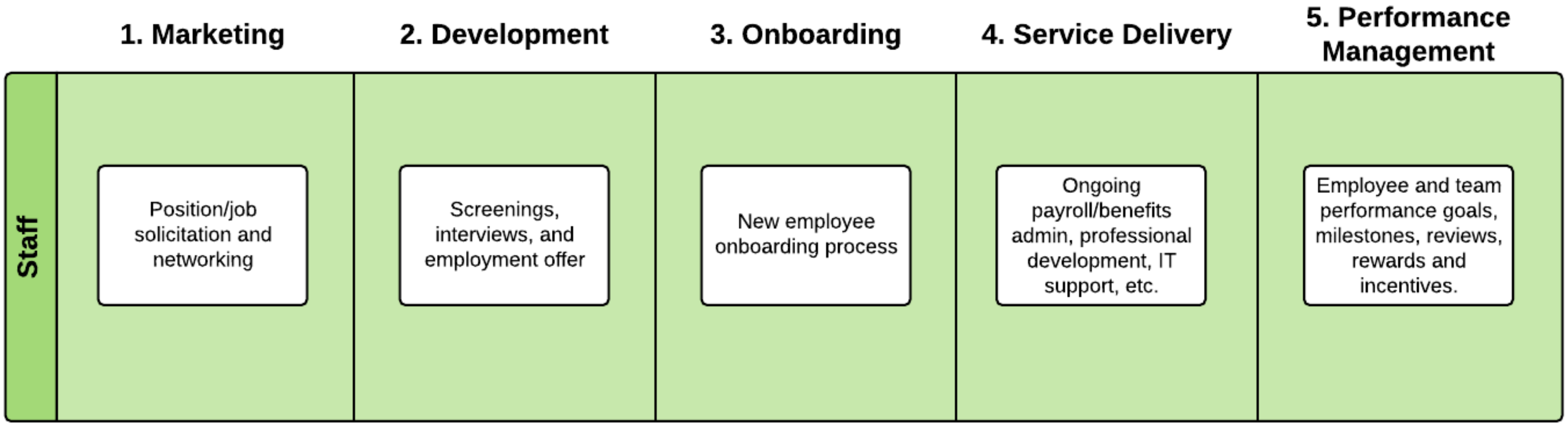
build
transforming nonprofits

Constituent Journey Framework (Typical)



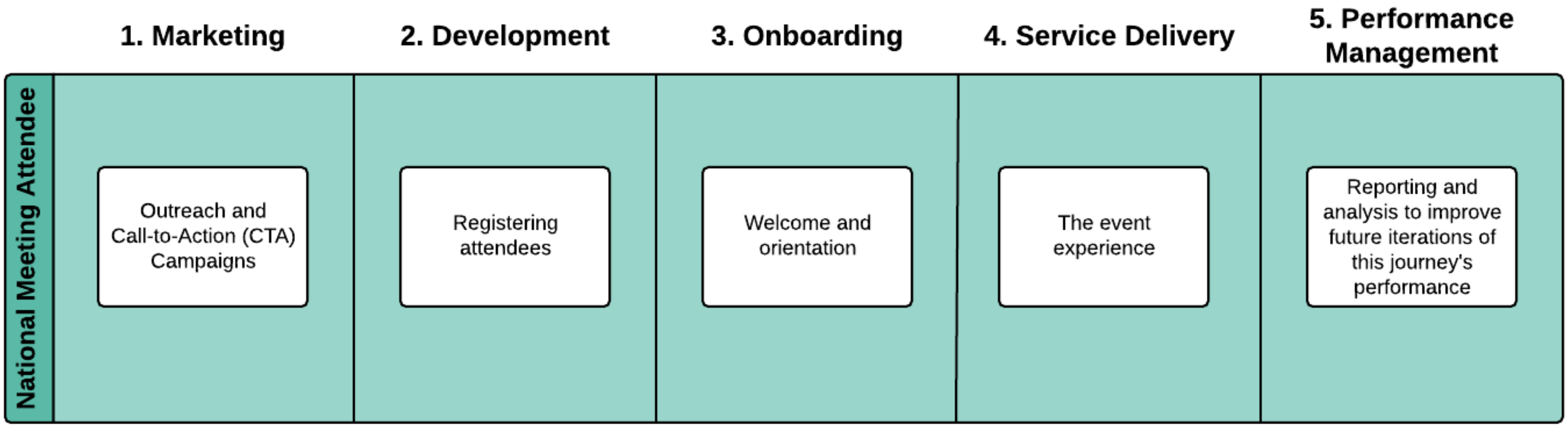
build
transforming nonprofits

Constituent Journey Framework (Typical)



build
transforming nonprofits

Constituent Journey Framework (Typical)



build
transforming nonprofits

Applying the framework

Describing each journey from end to end

build
transforming nonprofits

Method

- **Guided team journey walkthrough sessions**
- **Analysis of session notes**
- **Individual or small group follow-ups (as needed)**
- **Journey documentation**
- **Reflection to team for comment and revisions**
- **Gaining agreement**

Output of *high-level* journey mapping

For each journey:

- Group definition
- Journey outcomes

For each journey phase:

- Phase purpose
- Important strategic perspective
- Outcomes and how measured
- Boundaries: first and last steps
- Process notes (key processes and points of interest)
- Current systems and tools
- Desired improvements

build
transforming nonprofits

Output of *high-level* journey mapping: Samples

build
transforming nonprofits

“Client” Definition

Entities and individuals who provide funds to the Org in exchange for goods and services that are delivered to them directly as the beneficiary.

Journey Outcome(s)

The Org seeks to produce and maintain financially viable client engagements that result in the high-quality delivery of valued products and services.

PHASE 1: MARKETING

Purpose

This is the initial point of contact, where the Org is attempting to develop or cultivate new relationships. Digital outreach, live interaction, and calls to action are utilized to generate leads. The prospective client lead volume generated at this level is generally proportional to the volume of opportunities that will be had later on.

Strategic Perspective

The Org is working toward brand clarity and improved visibility in the market and seeks to improve cross-organization dissemination of lead information. Despite a rather unsophisticated approach to marketing, uniformity in the information being collected and the alignment of leads with product and service areas is critical. Lead-generating calls to action need to be clear and result in pathways where lead information is obtained. Lead generating mechanisms are in place currently, but they lack automation and systematic alignment with a CRM. Visibility is important for the promotion of the organization's ideas. The ability for those ideas to reach potential clients and spread through word of mouth has been a successful lead generation avenue.

Boundaries

First Step

A campaign is initiated.

Last Step

A prospect expresses interest in the Org's offerings.

Outcomes

The Org's client targeted marketing efforts are most focused on producing quality leads rather than a high quantity of leads. The organization, as a whole, does not place emphasis on building an extensive pipeline, but does have top line revenue targets. There is a need to identify targeted marketing and effective lead generation channels. No marketing goals are currently established. If the Org were to establish routine marketing metrics, they could form baselines and measure against them. The availability of metrics will allow for a more goal-oriented approach to client marketing. Data points that support these metrics might include:

- Unique visitors (currently collected)
- Newsletter click rates (currently collected)
- Lead volume (aspirational)
- Lead source distribution (aspirational)
- Opportunity lead source (aspirational)
- Google search volume (aspirational)
- Download volume via website/webform (currently collected)
- Average closed opportunity value by lead source (aspirational)

Phase Process Notes

- The Org generates leads through a variety of marketing channels, including personal networking with contacts, networking at Org-hosted and third-party events, through website pages and posts, through its newsletter, initial consultations, live and recorded webinars and other virtual events, and downloadable knowledge resources and tools. The ability to smoothly capture lead information in an org-wide CRM is critical.
- Staff engaged in networking should have the ability to manually enter leads into the CRM to be converted into accounts, contacts, and opportunities—or directly enter the accounts, contacts, and opportunities (bypassing creating a lead).
- Leads should be able to be automatedly assigned to owners, either based on lead type and/or on a round-robin basis.
- All website forms that collect registration information (event, resource, newsletter, etc.) from constituents should be automatedly processed into the CRM as leads.
- Newsletter subscriptions should be able to be self-managed by subscribers, as well as from the contact record in the CRM.
- Ideally, digital engagement data through registrations of all types, and well as engagement with newsletters, should be connected to the Contact records in the CRM. This will provide digital engagement insight to CRM users managing contact relationships.
- Constituent information collected via contact forms on the website should flow directly onto leads in the CRM.
- The webforms tool and/or the CRM should be able to provide notifications to the appropriate users when webforms are submitted and/or a lead is created in the CRM.

Current Systems and Tools

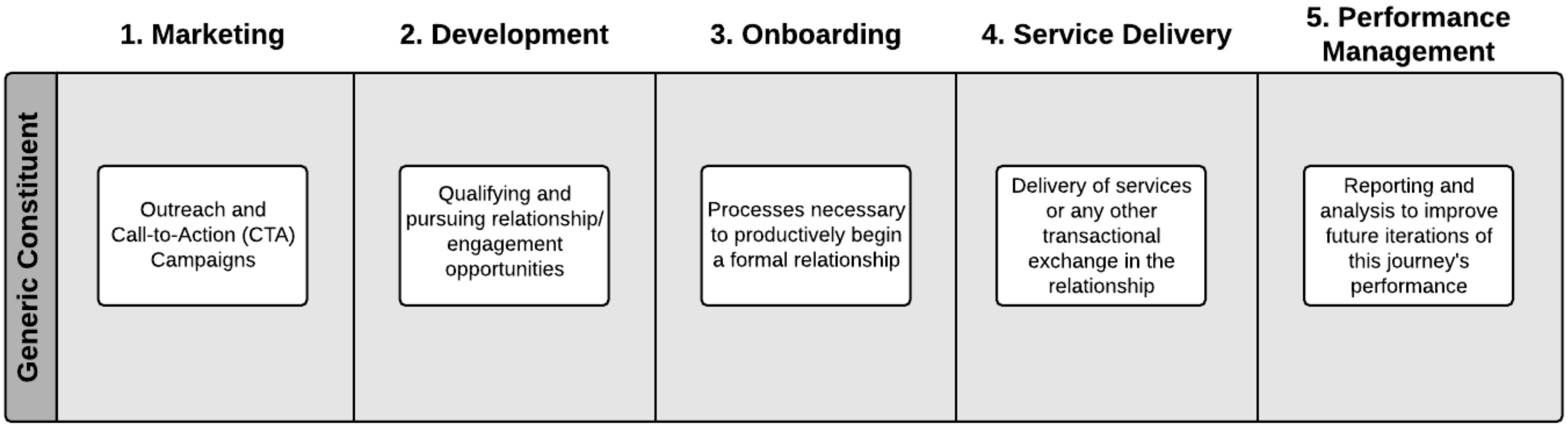
The Org’s current systems supporting this phase of the client journey are:

- CRM – Microsoft Dynamics
- E-Marketing / Newsletter – Constant Contact
- Website – WordPress
- Webforms / Downloads – JotForm and Gravity Forms
- Virtual Event Platform – Zoom and LMS (custom)
- Event Registration – Eventbrite, JotForm, Zoom
- Ecommerce – Shopify
- Survey – Qualtrics
- Email - Outlook

Desired Improvements

- Currently, all lead and opportunity information is manually entered by Org staff into the CRM. In the future, integrations between marketing automation tools and the CRM will allow many leads to be created in the CRM automatically.
- Access to the CRM is limited to only a couple of core sales management and sales support staff. Those staff do not have access to all lead producing sources. In the future, we desire all staff to have access to the CRM and to be able to use it to manage Client relationships.
- Lead information is captured through varying mechanisms and channels, however in most cases a single software tool is in place for each lead source (event registration, newsletter registration, etc.). We would like to continue the trend of centralizing marketing automation functions within a smaller set of tools that do not provide redundant functionality. This will also allow us to better standardize and better measure our marketing campaigns, activities—this is another key improvement for the organization.
- Not all lead information is ultimately entered into the CRM. Broadly established formal processes to support the transfer of information from each lead source into the CRM are not currently in place. In the future, all leads will be captured in the CRM.
- There is currently no defined responsibility or accountability for generating leads. In the future, performing more disciplined and thorough lead tracking will give greater insight into who and/or what lead sources are creating the most high-quality leads for the Org.
- Data used to produce metrics needs to be more accessible. The production and availability of actionable metrics will create an opportunity for the organization to be more intentional in its marketing efforts.

Constituent Journey Framework

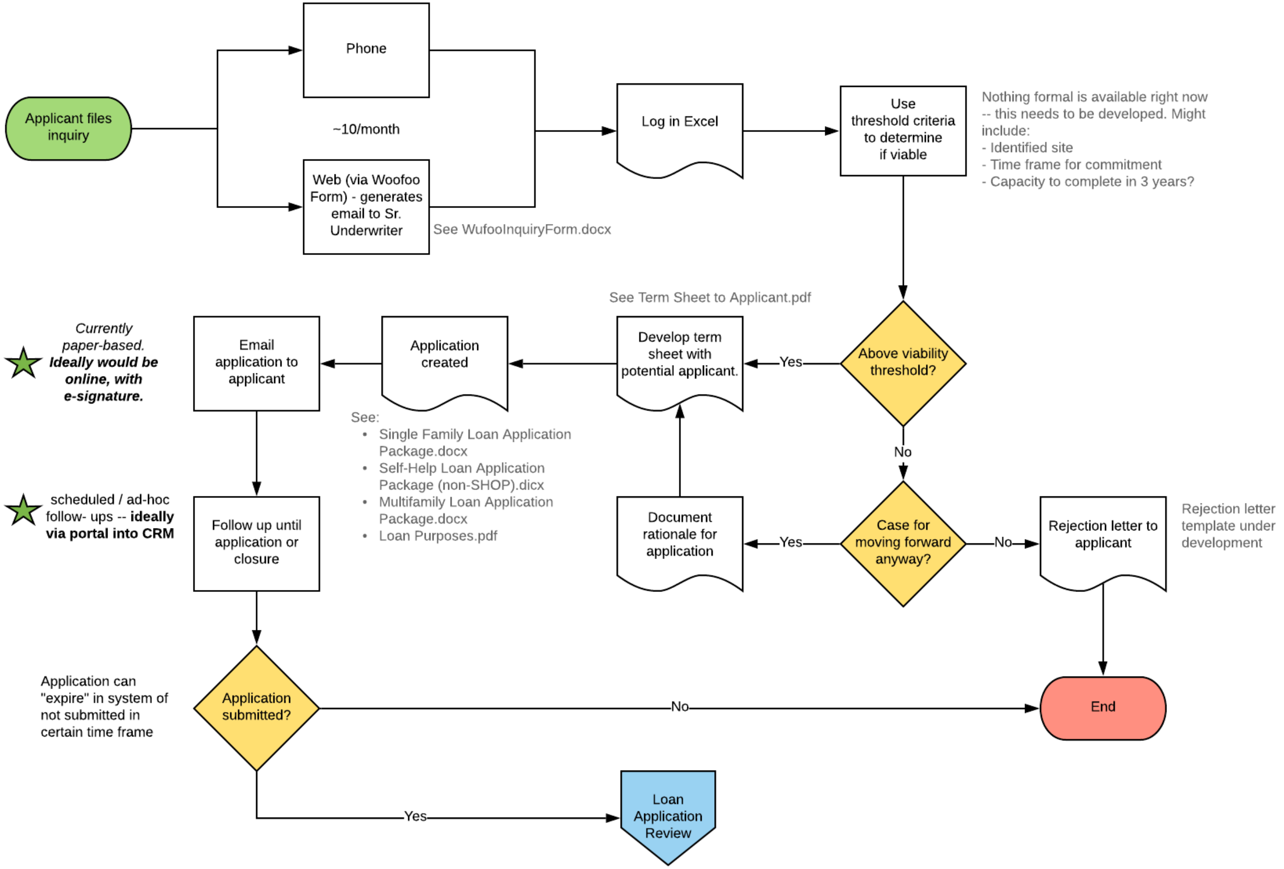


transforming nonprofits

Getting More Advanced with Added Detail: Samples

build
transforming nonprofits

Visual process mapping

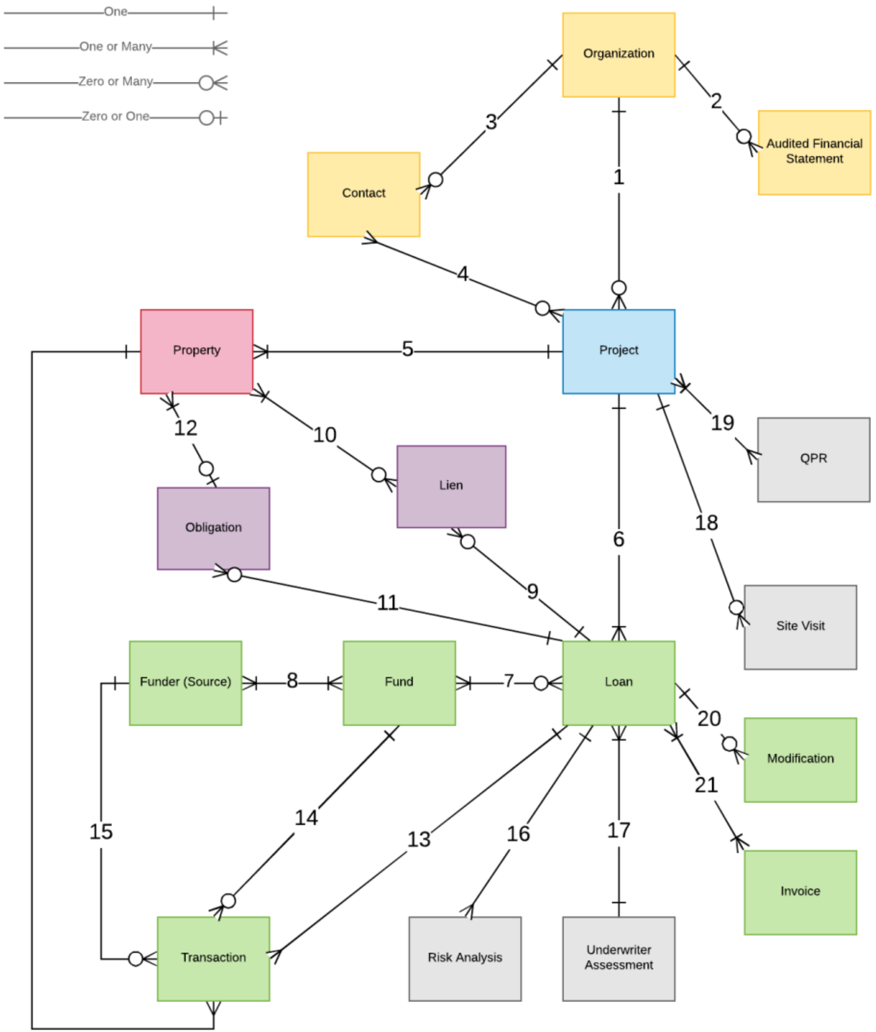


build
transforming nonprofits

Process narrative fine-level detail

Action #	Action	Actor(s)	Current State Notes	Future State Requirements	Major Data Objects	Notes and Questions
1c.	Collect: Experience/Interests/Skills	Prospective Volunteer; or Volunteer.	a. Current collect industry experience, skills, languages,	a. This will be conducted as a separate step	Constituent	This is the area where the applicant will have to commit the most mental energy. But if the process is aborted at this point, because of our step-by-step process we have everything that we need to reach out to the applicant in a personal way and help them to complete the process.
1d.	Collect: Behavioral Assessment questions	Prospective Volunteer; or Volunteer.	a.	a. This will be conducted as a separate step. b. Questions included in form to provide additional information to evaluators and allow follow-up discussions	Constituent	Behavioral assessment is currently under consideration for a beta test in chapters to be combined with an interview guide.
1e.	Felony Screening	Prospective Volunteer; or Volunteer.	a. Currently a question about whether applicant has a	a.		Recommend doing a basic google search to vet candidates. Given low incidence of issues, the use of an automated criminal background check is not recommended.
2.	Save or Submit application	Prospective Volunteer; or Volunteer.	b. Not currently possible to save	b. Allow constituent to save application by signing in?		

Data: Object Relationships



Data: Detailed Inventory

A15 | Inquiry (Underwriting)

	A	B	C	D	E	F	G	H	I
1	Initial Collection Point	Data Object	Form Field	Form Field Type	Values	Required at initial point of collection?	Next point at which information becomes required (if any) if not required at initial collection point	Validation rules	N
41	Application (Underwriting)	Organization	SAM Registration Status	Text		Yes			Sh
42	Application (Underwriting)	Organization	Fiscal Year End	Text		Yes		Validated as mm/dd	
43	Application (Underwriting)	Organization	Are annual audits conducted by independent CPA?	Radio	Yes;No	Yes		Single select	
44	Application (Underwriting)	Organization	How often are interim financial statements prepared?	Text		Yes			
45	Application (Underwriting)	Organization	How often are interims reviewed by the board?	Text		Yes			
46	Application (Underwriting)	Loan	Term requested (in years)	Text		Yes		Numeric	
47	Application (Underwriting)	Loan	Lien position	Text		Yes			
48	Application (Underwriting)	Project	Project Name	Text		Yes			
49	Application (Underwriting)	Project	Project Street Address	Text		Yes			W
50	Application (Underwriting)	Project	Project City	Text		Yes			W
51	Application (Underwriting)	Project	Project Census Tract	Text		Yes			
52	Application (Underwriting)	Project	Project County Population	Text		Yes		Numeric	
53	Application (Underwriting)	Project	Project Target Income	Checkbox	Extremely low-income (30%);Low income (80%);Very low-income (50%);Moderate (115%)	Yes		Multiple select	
54	Application (Underwriting)	Project	Project Target Group (also called "Target Populations" on self-help loan application)	Checkbox	Elderly/Seniors;Disabled;Veterans;Special Needs;Native Americans;African Americans;Hispanics/Latinos;Other	Yes		Multiple select	Th w or
	Application (Underwriting)	Loan	Assurances and Certifications	Signature		Yes		Requires signature of	Se

FieldData | DataObjects | Processes | ProcessAreas | AssessmentCriteria | AssessmentCategories | ReferenceSources ...


Success is like…
Well, not like an epic/cheesy victory jump. But still pretty sweet.
build
transforming nonprofits

Success looks like

- **The nonprofit organizes around constituents and their experience of the organization, rather than around business silos**
- **Everyone has a common understanding of the constituent journeys, and a set of terms with which to discuss them**
- **Much easier to understand how proposed strategic initiatives will make the constituent experience different, and hopefully better.**
- **Business requirements are more easily communicated to vendors—from brand agencies to software providers**

build
transforming nonprofits

Continue the conversation via…

peter.mirus@buildconsulting.com

linkedin.com/in/petermirus/

buildconsulting.com

Q&A