STRONGER ROOTS

ZO ČSOP VERONICA

How to Research Supporters and Implement a CRM

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STEFAN BATORY FOUNDATION
Funded by the European Union

The Ecological Institute Veronica

is dedicated to climate protection and sustainable ways of living. It belongs to the Czech Union of Nature Conservation and, in addition to educational and consulting work, it also publishes the environmental and cultural magazine of the same name and operates an ecological centre in Hostětín. The organisation's team consists of approximately 20 people, most of whom work part-time.

Veronica was founded in 1986 and over the decades it has managed to build up a diverse circle of supporters. Some people support the organisation financially, while others attend its seminars in Hostětín, read the magazine or follow the activities on social networks. However, most of the diverse groups that have formed around the individual activities of the organisation were unaware of each other. The organisation did not have centralised database of contacts or a CRM system, and communication with them took place through various channels and often in a fairly non-systematic way. Participation in the Stronger Roots program thus offered the Veronica team the opportunity to systematically explore who their supporters actually are, how they relate to the organisation and what they expect from it.

Initially, the team had a simple plan: create a questionnaire, do five interviews, and from this derive a strategy. The input gained from the consultant and sociologist Martin Schlossark and the mentor Přemysl Filip quickly made them realise that the creation of a correctly posed question is an art and that, given the breadth of the organisation's community, the overall research needed to be more sophisticated. The development of the questionnaire turned into a longer process during which not only the individual formulation of the questions but also the level of the language, its length and the method of distribution were fine-tuned. Questions that require longer reflection always have a lower chance of being answered, and so clarity and simplicity increasingly became the main criterion.

A sample of die-hard and less-involved supporters

The organisation also changed the distribution strategy of the questionnaire. In order to ensure that not only the most hardcore supporters but also less enthusiastic ones filled out the questionnaire, Veronica decided to make targeted personal mailings instead of circulating the questionnaire en masse through newsletter. One of Veronica's colleagues with a mathematical background prepared a lottery-like system that generated a random numerical order from the organisation's nearly 20,000 contacts and sent the questionnaire initially to the first thousand. The accompanying email was personalised and included a small incentive to encourage individuals to fill it out, such as a discount on events. More waves of mailing followed, and in total, Veronica reached out to a total of 6,000 people and received a response from roughly 300 of them.

“We decided to expand the research of our supporters by consulting experts to obtain relevant quantitative feedback from a sufficient number of members of our community. The research allowed us to understand in greater detail who our supporters are in terms of their socio-demographics, interests, values, relationship to our organisation, and preferences in topics and communication channels.” ***– Petra Albrechtová***

The originally planned individual interviews were eventually replaced by two focus groups with five participants in each of them. The representative groups varied from donors to readers to people who had attended our events. While the discussions provided valuable insights, the team reflected in retrospect that it would be more effective to define specific types of supporters (e.g. donors, event attendees, readers) and to have separate interviews with each of these groups to gain a deeper understanding of each of them. Generalising inputs from these mixed groups proved too broad and difficult to apply in practice.

The new findings will support the new strategy

The final report, which summarised the mapping process, confirmed the original suspicion. Veronica does not have one, but several isolated community segments, each with different needs and expectations, and many people are completely unaware of how wide a range of activities the organisation offers. It also showed

that some topics – such as climate anxiety or mental health – are not crucial issues for most of our supporters, although the younger part of the team considers them to be essential. While most respondents expressed sympathy for Veronica, they are more financially supportive of organisations focused on humanitarian issues (health, disability, social distress) or the protection of biodiversity and landscapes. It was also interesting to note that some people had become interested in Veronica's work decades ago and have been monitoring its activities for a long time, but the organisation has also managed to reach out to new supporters who have only gotten to know it in the last five to ten years.

The team sees the results as a valuable basis for future planning in terms of engagement and communication strategies. But one of the main takeaway lessons is the need to define well in advance what you want to find out. Without clear questions, there is a risk that the data collection will be too broad and the results difficult to use.

The hero behind the change

In addition to the mapping itself, the project also brought about one major systemic shift, which was the introduction of a CRM system. Although the team initially feared that this innovation would not be easy to implement, the reality was surprisingly positive. A volunteer (a retired IT analyst) played a key role, personally visiting Veronica's individual teams throughout Moravia, presenting the benefits of having a CRM to them, explaining its functions while simultaneously collecting data to enter into the system.

Thanks to this patient and personal approach, it was possible to move relatively

smoothly from the various Excel spreadsheets to the unified Salesforce CRM system, which is now used by all key staff. The new system not only enables better contact management and more strategic communication, but it has also centralised a number of agendas – from registering donors, cataloguing donations and maintaining member records to event management, newsletters, and requests for ecological consultations, as well as accommodation, excursions or educational programs. This makes it possible to quickly generate reports, target individual groups and save time on administrative tasks.

5 QUICK TIPS FOR DOING RESEARCH ON YOUR COMMUNITY:

1. **Start with clear research questions. This will help target the tools being used and produce actionable outputs.**
2. **Take into account the segmentation of your community when doing research - a donor is interested in something different than an attendee of a seminar.**
3. **Use both research and IT experts. This will ensure the quality of the methods as well as the sustainability of the proposed solutions.**
4. **Implement a CRM system. This is a key tool for strategic communication and relationship management.**
5. **Be prepared for a more demanding process. The reality will most likely be bigger and more complex than your original plan.**

Ondřej Besperát

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This case study was developed within the Stronger Roots programme which is funded by the European Union. Views and opinions expressed are however those of the authors only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

The aim of the Stronger Roots programme is to increase the resilience of civil society organisations and their networks, strengthen their social capital, and embed them in the communities and societies in which they operate. The programme is implemented by the Open Society Fund Prague, the NIOK Foundation, the Open Society Foundation Bratislava, and Glopolis.