

INVESTING IN RELATIONSHIPS ONE INDIVIDUAL AT A TIME

Templates, tools, courses
and hands-on consulting customized
for local United Ways of all sizes.

Find the solutions that work
for your organization.



WHY RELATIONSHIP MANAGEMENT? WHY NOW?

- ☑ Are your campaigns declining?
- ☑ Are your donors, volunteers and advocates defecting?
- ☑ Do you understand what your constituents want from United Way?
- ☑ More importantly, are your donors, volunteers and advocates getting what they want—or are they turning to another cause instead of United Way?

If you answer YES to any of these questions, now is the time to invest in a new business strategy to optimize resources, operations and community impact by developing a Relationship Management competency at your United Way.

“Relationship management has significantly changed the way we operate and was the impetus for us to reach out to over 20,000 lapsed donors, recouping over \$350,000 in lost revenue and still counting. The support provided through participating in the Relationship Management Learning Circle has been instrumental to our future success and growth.”

Bonnie Cole, SVP Resource Development, United Way of Metro Atlanta

HONE YOUR ORGANIZATION'S RELATIONSHIP-BUILDING SKILLS BY FOCUSING ON THESE FIVE RELATIONSHIP MANAGEMENT PILLARS

These are the foundational pillars used to build a Relationship Management competency within your United Way.



ORGANIZATION/CULTURE

Organizational readiness, leadership support and cultural mindset for adopting Relationship Management and the changes required.



OPERATIONS/PROCESS

Infrastructure and supporting processes required to implement Relationship Management in a systematic and sustainable manner.



DATA

Constituent information and insights required to enhance understanding and enrich engagement.



ENGAGEMENT

Ability to leverage constituent data to make communication and messages more precise and relevant.



TECHNOLOGY

Enabling platform and integrated set of systems to support an automated approach to managing and reporting on customer interactions and data.

“The Relationship Management Learning Circle project helped us to focus on relationship organization—AND deliver tangible results! We’ve seen return mail rates decline from 5% exponentially, home address capture rate increase from 60% to 81%, and targeted direct

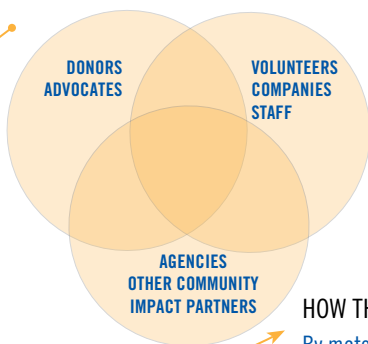
WHAT UNITED WAY RELATIONSHIP MANAGEMENT LOOKS LIKE:

We will know more about our constituents, such as **where they live, where they work**, what they care about, their interest in our agenda and their **capacity, affinity and propensity** to give to United Way.

WHAT WE WILL KNOW

Ultimately, our **constituents will embrace our organization** and will do things like **share more data, donate more financial gifts, offer more time towards volunteering and advocate** for United Way throughout their company and community.

WHAT THEY WILL DO AS A RESULT



WHAT THEY WILL SEE FROM US

They will see that **THIS is an organization for** people/companies/agencies like **me**. Based on new information captured and understood, United Way will be able to provide programs, products and services that are **relevant**, and messaging that is **timely, meaningful and motivating**.

HOW THEY WILL FEEL

By matching relevant engagements, products and communications to our constituents—based on what we know about them—they will have a **great experience, feel recognized, appreciated, and a part of a social movement that Advances the Common Good**.

relationship management with an increased level of consistency and discipline across the % to <1%, email address capture increase from 10% to 31% and email open rates rise at mail campaigns raise nearly a quarter of a million dollars in the first 18 months!"

Janet Jackson, CEO, United Way of Central Ohio (Columbus)

“In order for United Way to effectively manage relationships and provide a great experience to our individual constituents, we must implement and practice relationship-building in a more formal, disciplined, integrated and strategic way.”

Jim Yu, Vice President, Relationship Management, United Way Worldwide

WHY THIS IS DIFFERENT

- FORMAL:** Through structured approach and documentation around planning, we help you make it a focus and a priority for your entire organization.
- DISCIPLINED:** We offer a disciplined approach that emphasizes best practices, planning and accountability to keep you on track.
- INTEGRATED:** We reinforce that Relationship Management is everyone’s job, requiring cross-functional approaches and a collaborative environment for success.
- STRATEGIC:** We approach Relationship Management as a business strategy that will alter and enhance the work you do at your United Way to improve the outcomes you seek in your communities.

“We value the Template Certificate training and the great start that it has given us. We would recommend the experience to anyone.”

Virgil Keller, Vice President, Planning and Community Development,
United Way of the Midlands (Omaha)

RELATIONSHIP MANAGEMENT TRAINING AND TOOLS

Relationship Management Starter Kit, Templates & Tools

Get the Roadmap Starter Kit—the strategic plan for implementing Relationship Management at your United Way. Developed by Clarity Group and local United Ways, the Roadmap provides the strategies, tactics and the how-to templates and tools to transform your organization.

Monthly Relationship Management Webinar Series

An internal relationship-building opportunity for your entire staff. Packed with case studies and best practices, guest speakers from local United Ways share their stories of successfully implementing Relationship Management.

Online Self Assessment

Assess your readiness for Relationship Management with the Online Assessment. Take the survey to identify the areas of greatest opportunity and get initial thought starters to ramp up the transformation at your United Way.



Relationship Management Template Certification

Delivered via a combination of interactive webinars, homework assignments and consulting from Clarity Group, this 10-week United Way Virtual Learning Series will show you how to get started, how to involve all your staff, and provide you the materials and tools to implement Relationship Management at your local United Way. Relationship Management Template Certification has been optimized for smaller United Ways and those who are just getting started with Relationship Management.

Relationship Management Intensive

A fast-paced immersion into Relationship Management, led by Clarity Group, combining teleconference group sessions, an on-site multi-day workshop and ongoing learning and refinement. Accelerate your impact by providing tangible, hands on “action-learning” that focuses on implementing measureable “Quick Win” Relationship Management piloted activities.

Relationship Management Learning Circles

Join a peer group and commit to a 12-month collaborative journey in developing Relationship Management at your United Way. Includes on-site consulting from Clarity Group to craft a custom Relationship Management Roadmap and provide hands-on guidance utilizing Clarity Group’s Relationship Management Tools and Templates. You and your cross-functional team will transform your organization, improve your internal communication and operating processes and see real results in donor retention, constituent engagement and revenue growth.

For more information, contact Jim.Yu@unitedway.org

GET STARTED TODAY!

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Clarity Group is helping build a relationship management competency for the United Way movement. Now working with over 45 local United Ways and United Way Worldwide since 2006, Clarity Group is dedicated to serving clients in the faith-based and not-for-profit sector. Learn more about Clarity Group at www.claritygroupinc.com.



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