

Secrets to Success: Nine Professional Habits to Make You a Pro

As an agency guy, I've worked directly with many folks from nonprofit organizations over for the last 30 years. All have been a delight to know, but some seem to struggle to get things done while others just go with the flow and never seem to break a sweat.

Here's a collection of what I believe are nine habits of effective fundraising managers. I can't prove these habits will lower your blood pressure, but they sure will make your service providers always want to go the extra mile for you.

1. Have an annual plan

That doesn't mean taking last year's actual numbers and adding 5%. If individual contributions make up a significant portion of your revenue, decide before beginning a year if file growth or an increase in net revenue is the goal. Unless you're willing to invest a lot more in a donor program, you can't make major headway in both growth and revenue. I see many managers trying to do both, with great frustration. Write a plan for the year to acquire more donors than you will lose, and make sure the current donor file is managed to show positive net revenue.

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2. Give clear instructions.

The value of this habit should be obvious. However, I remember many creative input sessions where clients simply were not prepared to clearly state what they were looking for – and then were disappointed with drafts coming from the designers and writers. The same holds true for defining the right data selects for appeals. One of the biggest culprits I see here is vaguely worded e-mails. Or long strings of forwarded messages that the recipient has to decipher. Tell the next person in the process chain exactly what you want, or better yet, ask his or her advice. Always clearly communicate what you want.

3. Don't be swayed

Be prepared to make technology work for you, but don't jump at promises that the new way is always better. Since I started producing direct-mail campaigns back in the '70's, I've seen personalization, database analytics,

premiums, telemarketing, Web, e-mail and a host of new ways to communicate with donors come on the scene. Like every tool on my workbench, each has an appropriate use. Remember, someone will invent the solution and then go looking for a problem to solve. Invest carefully in new tools for your workbench and keep the old ones sharp and ready for action.

4. Keep to deadlines

Simple statement, but hard to do. A lot of folks still don't realize that even if you're only a day late with an approval or file transmission, you could cause a major delay in your campaign. Loose your place in line with a printer or a lettershop that was expecting your work on a certain day, and you might have to wait until after another job is produced. Develop a reputation for timeliness so that when you do have a deadline problem, those who serve you will recognize it as a real emergency and bend over backward to help you.

5. Pay your bills on time

If your organization has cash flow problems, 'fess up. Your providers will work with you to get your work done. But don't

allow your accounts payable folk to become 'slow pays' as a matter of habit. You'd be amazed at the extra cooperation you receive when you have a reputation for paying your bills on time. And beware of service providers who tolerate bad behavior. They aren't necessarily being generous: they might just be desperate.

6. Always send clean data

Back in the old days when mainframes stored databases and the UPS guy delivered files on tape reels, quality control checks were very important. Messing up meant a delay of days to re-run the file and even more time for delivery.

Now files arrive during the night to an ftp site, ready to become part of a campaign the next day. With a few mouse clicks, employees can create and send a file faster than the old main-framer could pour his coffee and even think about starting a job. Write routines for all standard jobs, and triple-check the specifications for all special data pulls before they're transmitted.

7. Never make copy or design changes at proof stage

Here again, technology advancements that promise to save us time sometimes cost everyone time and patience. Not so many years ago, artists and writers collaborated to develop a loose 'comp' that would be approved or rejected by a client before any more work was done. Changing

some words or a typeface and moving a few photos meant starting over, but at least progress was being made.

Now I often see the final decision-maker waiting to review a creative project moments before the presses roll or an e-mail blast is scheduled. Technology allows us to deal with the inevitable emergencies that come our way – but we shouldn't be in permanent emergency mode. Stick to deadlines, review concepts early on, and approve great work as early as practically possible.

8. Return calls promptly

Many of the good habits I mentioned earlier all involve clear communication. Sometimes, though, I'd welcome any communication. Gone are the days of sorting through the little pink "While You Were Out" slips. But at least those slips allowed busy managers to prioritize who they'd deal with next. E-mails, voice mails and text messages fall on you like hail in a thunderstorm. None of this can be used as an excuse. Folks downstream from you in the project chain need to hear from you before your boss does. Ignoring them is not a form of control; it's a sign you're out of control. Pay close attention to the people who serve you.

9. Don't sweat the small stuff

When I was writing this column, one of my colleagues suggested this as the most important habit

to embrace. Direct response fundraising can be an awesomely complex medium. Remember the annual plan? Stay focused on a strategy that will get you to a successful future. Trust your support team. And don't sweat the small stuff.

I wish I could claim these as rock-solid personal habits, but I can't. However, I'm working on them, and I hope you are, too.

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