

# THINK

Stewardship Tracker



## What is the Stewardship Tracker ?

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The Stewardship Tracker is a tried and tested approach of mystery shopping in the fundraising environment which has already provided hugely valuable insight to more than 40 UK charities.

Working through a UK wide team of mystery supporters, the Stewardship Tracker enables you to assess the effectiveness of your supporter relationship management across a range of key activities both monthly and annually so you can build an ongoing picture of supporter experience over time. It provides evidence and analysis of the strengths and weaknesses of the supporter experience and relationship management.

The cumulative nature of the Tracker's sampling offers an invaluable alternative to other mystery shopper products which only sample activity once a year.

## Who are we ?

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THINK Intelligence have been running this successful programme since 2010 and this experience has enabled us to build up an amazing team who work together to provide you with extremely high quality information and detailed analysis.

Susan Morgan leads the team and will be your day to day contact. She has over twenty five years experience in the sector and will take time getting to know you and your organisation, making sure the programme meets your individual needs wherever possible.

The team of mystery shoppers provides you with accurate and comprehensive feedback and behave just as a real life supporter would do. We have carried out several thousand mystery shops over the years so know how to make this a truly realistic interaction.

The report writing team have all been fundraising practitioners and they are highly skilled at analysing the great volumes of data and presenting this back in a condensed plain English format which highlights the key themes and summarises the activity.



# How it works



**28 mystery supporters** are allocated per member with a UK wide spread



We give a detailed briefing for their **twelve month** journey

They complete **ninety separate tasks** which include:

<b>12</b>  ENQUIRIES FROM POTENTIAL SUPPORTERS	<b>2</b>  GENERAL ENQUIRIES FROM DONORS	<b>12</b>  ONE OFF CASH DONATIONS
<b>12</b>  REGULAR GIFTS	<b>6</b>  REGULAR GIFT RE-ACTIVATIONS	<b>6</b>  COMPLAINTS
<b>6</b>  LEGACY ENQUIRIES FROM REGULAR GIVERS	<b>8</b>  BESPOKE ACTIVITIES, TAILORED TO YOUR INDIVIDUAL REQUIREMENTS	<b>26</b>  REVIEWS OF ONGOING COMMUNICATION WITH SUPPORTERS

The mystery supporters operate across multiple channels including website, email, telephone, mail and other bespoke where chosen.

We scrutinise their feedback regularly to spot and signpost urgent issues.

## Our approach

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We refresh the programme each year, adding new elements and questions to make sure the information provides what you need in the current market place. The core elements also remain to make sure you can monitor trends over time.

### Latest developments:

**Compliance:** In 2016 we added in a new section on compliance, both monitoring individual members and comparing against others.

**Recommendations:** The highlights and recommendations section of each individual report signposts you to priority actions. In depth recommendations can be provided through an optional additional report.

**Communication timeline tracking:** Provision of an annotated timeline of all communications received following mystery supporter donations. This can be chosen as an alternative to the bespoke activities or provided as an optional additional activity.

### Responding to your needs:

You can be involved in the programme with as much or as little input as you feel you need and we will work with you in a way which best meets your needs. Some members just want to be recipients of the detailed reports, others prefer a more hands on approach understanding the detail of what is happening and when and we are adaptable to your needs.





## What do you get as a member ?

### Two in depth reports

at the midpoint and end of the programme which summarise and analyse your results, highlighting the areas which we recommend as the focus for your attention. Each report will build on the previous one creating an ongoing picture of your stewardship.



### Immediate alert reports

on any activity which is regarded as both failing to meet your standards and is potentially damaging to your reputation.



### Two benchmarking reports

for all members of the THINK Stewardship Tracker comparing stewardship across member organisations. Provided after the end of your programme and updated after six months with newer data.



### Annual members meeting

giving you an opportunity to network with other members and talk through the benchmarking report in detail

## An opportunity to buy 'add ons' which include:

additional one off mystery shops which repeat the core activity



bespoke mystery supporting activity to expand the analysis



provision of additional more in-depth recommendations by a THINK consultant as a supplement to your report



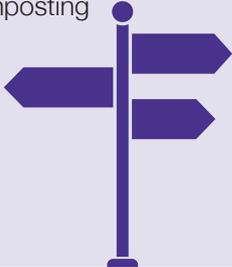
an annotated timeline of all communications received following mystery supporter donations



# What you will get to know

For all activities we provide factual data on times, dates and nuances of each activity, coupled with the impression this gave to the individual mystery supporter giving you an invaluable insight into the effectiveness of your ongoing stewardship. We can even take a longer term view, year on year.

## We also monitor

<p>Signposting</p> 	<p>Functionality and efficiency of enquiry and donation process</p> 	<p>How supporters are welcomed</p> 
<p>Banking and processing efficiency</p> 	<p>Call handling skills</p> 	<p>Complaint and query handling skills and effectiveness</p> 
<p>Response times and methods across all entry points including telephone, letter, email and web</p> 	<p>Communication frequency and content</p> 	<p>Levels of personalisation and engagement in response to individuals circumstances and support</p> 
<p>Gift Aid</p> 	<p>Compliance with latest regulation and best practice requirements</p> 	<p>Supporter impressions</p> 

## Testimonial

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We have been using the Stewardship Tracker since 2010 and it has helped us immensely in developing our own supporter care strategy and ensuring we review any inconsistencies in our current processes.

One of the really positive aspects of the tracker is that it also enables you to celebrate successes within the team as it highlights the areas that you are excelling in and is a mechanism to share the achievements of the supporter care team with the entire organisation.

We would recommend the Tracker to other organisations as it helps provide insight into your supporter care teams and allows regular and quick changes to be applied and tested. The service they offer is very professional and comprehensive.

*Guide Dogs*



## Become a member

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Special reduced price of £7,900 for those who sign up for a twenty four month period, this is a saving of £300 against the regular price of £4,100\* per annum when joining for an initial twelve month basis.

There are two intakes into the programme in April and October each year.

To discuss or join the programme please contact:

Susan Morgan on [sue@thinkcs.org](mailto:sue@thinkcs.org) or **01280 824297**.

\*Membership fees attract VAT. Members are also invoiced for an annual donation fund of £844 which is returned throughout the programme via mystery supporter donations.





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