



How Client Engagement is Being Disrupted

2020 Community Foundation Virtual Workshop
Breakout Session Workbook

Facilitator:

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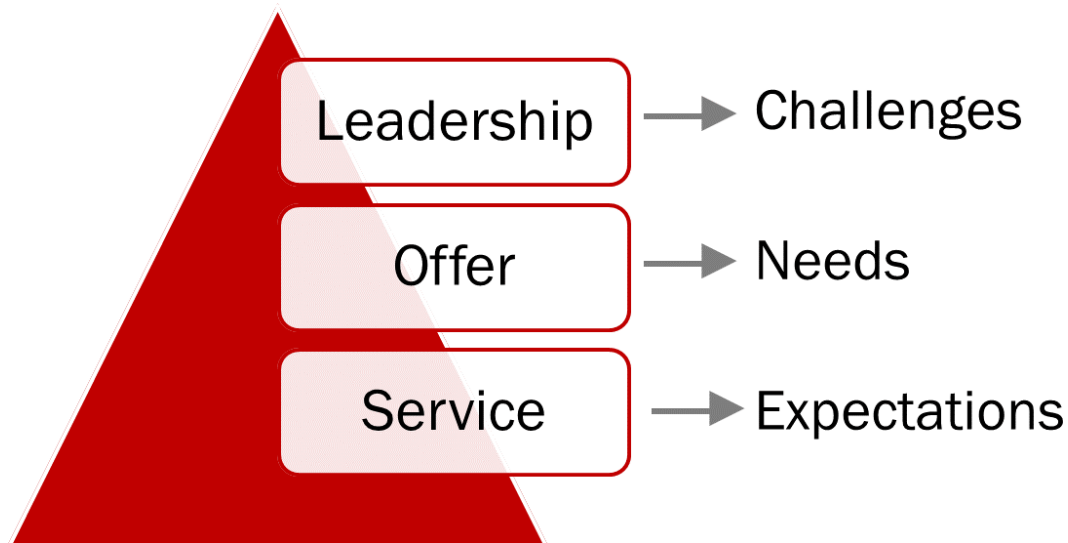
Peer Sharing:

How do you believe the donor experience *needs* to change going forward?

What examples can you share of how you are evolving the donor experience or demonstrating leadership?

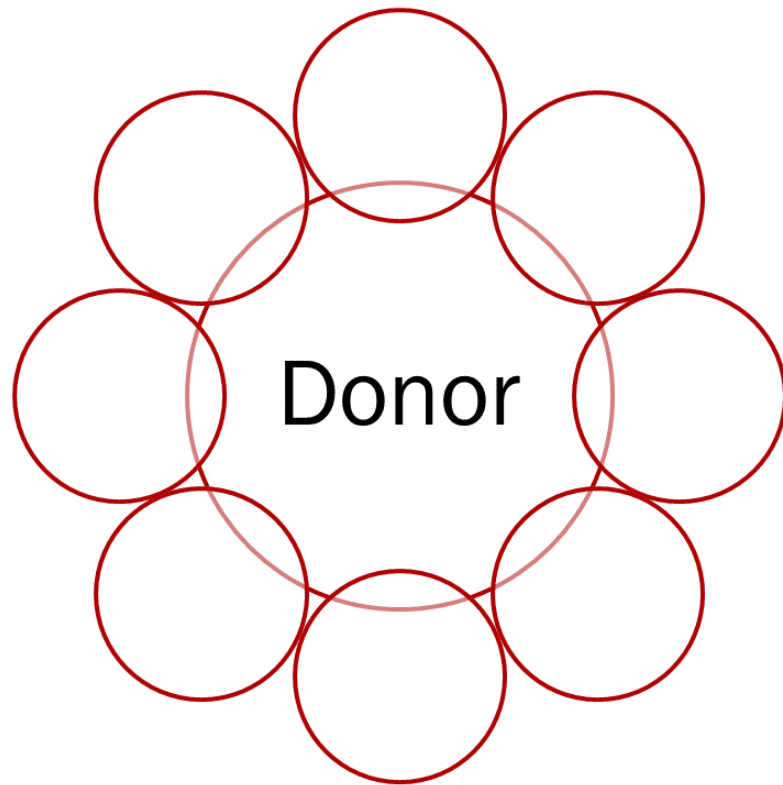
Demonstrating Leadership:

During the session we looked at the image below, showing the path from 'merely satisfied' to 'profoundly engaged', along with the client input that informs each level.



We'll focus first on leadership – the top of the pyramid.

Think about your ideal donor at the center of the image below. List all challenges that they are facing right now to complete the circle.



Taking Action

What do you consider the top three challenges for donors today, drawing on the list above?

1. _____
2. _____
3. _____

How can you support donors in meeting the first challenge you identified above? (Think creatively and outside the box. You aren't making commitments today, simply thinking about what is possible.)

1. _____
2. _____
3. _____
4. _____
5. _____

If you were able to support donors in these ways what would the impact be?

If you have time, consider the other two levels.

How do you see core service expectations changing (the base of the pyramid)?

What do you need to deliver in order to say you are meeting core service expectations (the base of the pyramid)?

How do you see donor needs changing (the middle of the pyramid)?

How, if at all, will you need to enhance your offer in order to say your are meeting the evolving needs of donors?

What one thing do you think your organization can do to enhance the donor experience?

THANKS!