

It's nothing personal...

The power of building relationships beyond the transaction



A LINE STRATEGY

Constituent-Centricity

“ The first tenet of customer-centric organizations is to do business the way the customer wants to do business

Amy Kates, Jay Galbraith, *Designing your Organization*

TRIZ


теория решения изобретательских задач
(teoriya resheniya izobretatelskikh zadatch)

A fun facilitation tool that helps
groups stop unwanted behaviors.

Your nonprofit just hired you, and your consultancy team, to **destroy all good will** with your supporters.



Your nonprofit just hired you, and your consultancy team, to **destroy all good will** with your supporters.



We can handle that !

**Gleefully design how you
will reliably and
systematically destroy
constituent experience**



Gleefully design how you
will reliably and
systematically destroy
constituent experience

Type your most extreme idea in chat.



Gleefully design how you
will reliably and
systematically destroy
constituent experience

Type your most extreme idea in chat.

On my count, hit the return key.



Gleefully design how you
will reliably and
systematically destroy
constituent experience

Type your most extreme idea in chat.

On my count, hit the return key.


Fine,
I'll go along.



Privately reflect, what are we (possibly you) doing that is a little bit like this?



Privately reflect, what are we (possibly you) doing that is a little bit like this?



Not a thing lady.

Are we doing this on purpose ?

We will cover

What customer-centricity means in practice and how will it change...

1. **The nature of your relationships**
2. **What you give and get from your constituents**
3. **How you operate across your organization**

Why this is hard

Staff have different understandings about your constituents.

Departments manage their own constituents, perhaps in siloes.

Competition about who “owns” constituents relationships.

Fragmentation and silos are huge obstacles to constituent centricity.

the solution

Understanding their
Motivation

the solution

Understanding their

Motivation

**Develop constituent
segmentation**

**Identify the
value exchange**

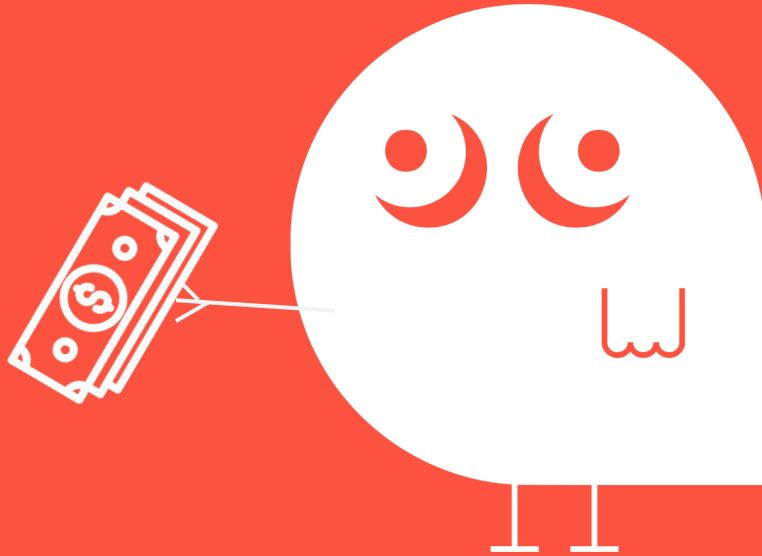
Align operations

Motivation-based Segmentation

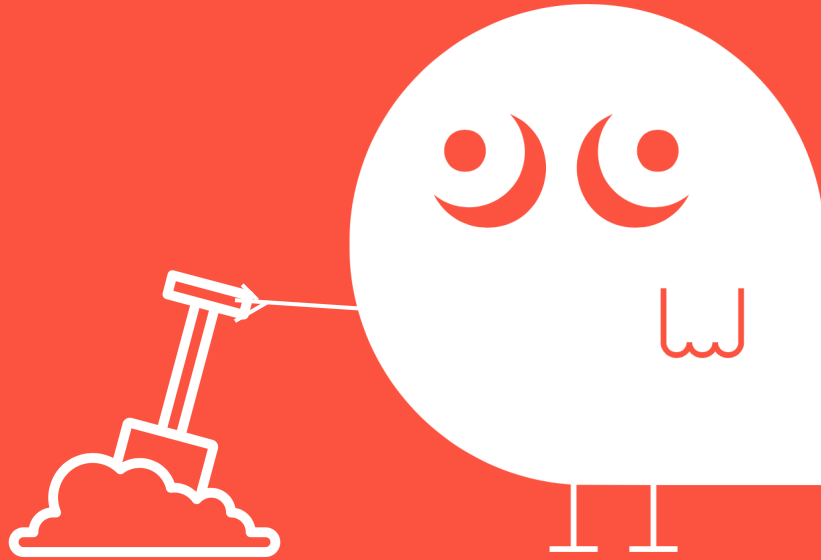


how we typically think of constituents...

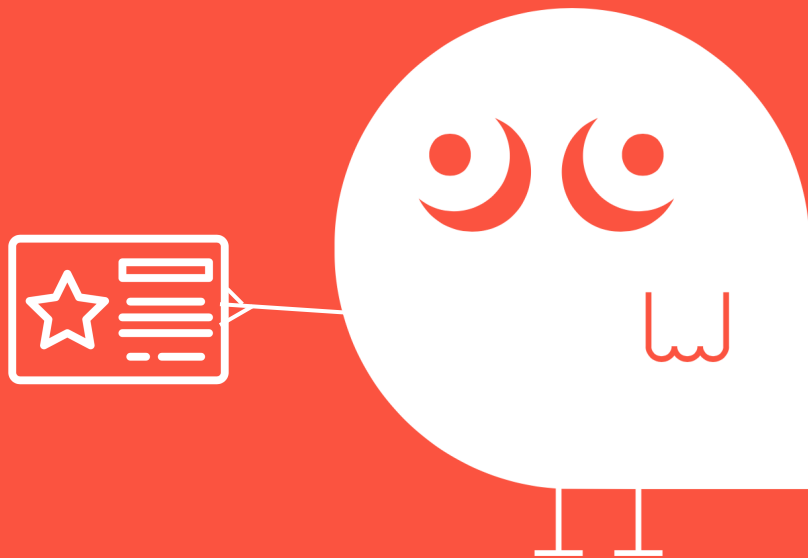
Donor



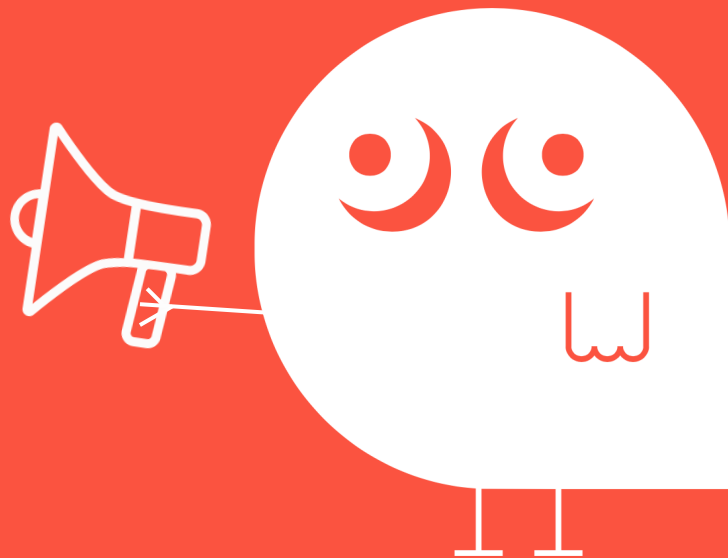
Volunteer



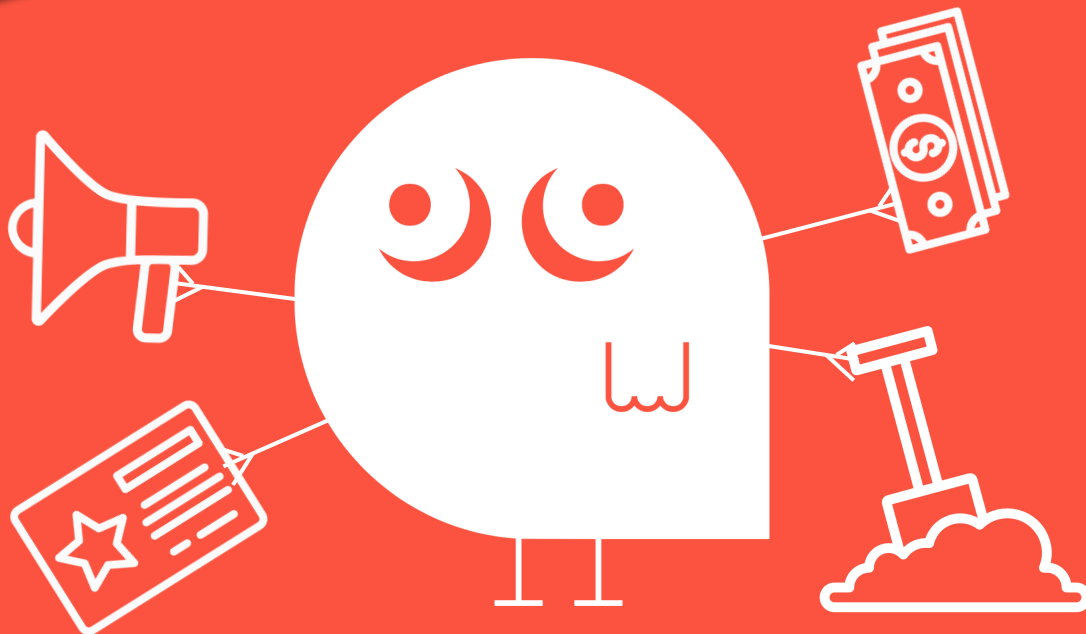
Member



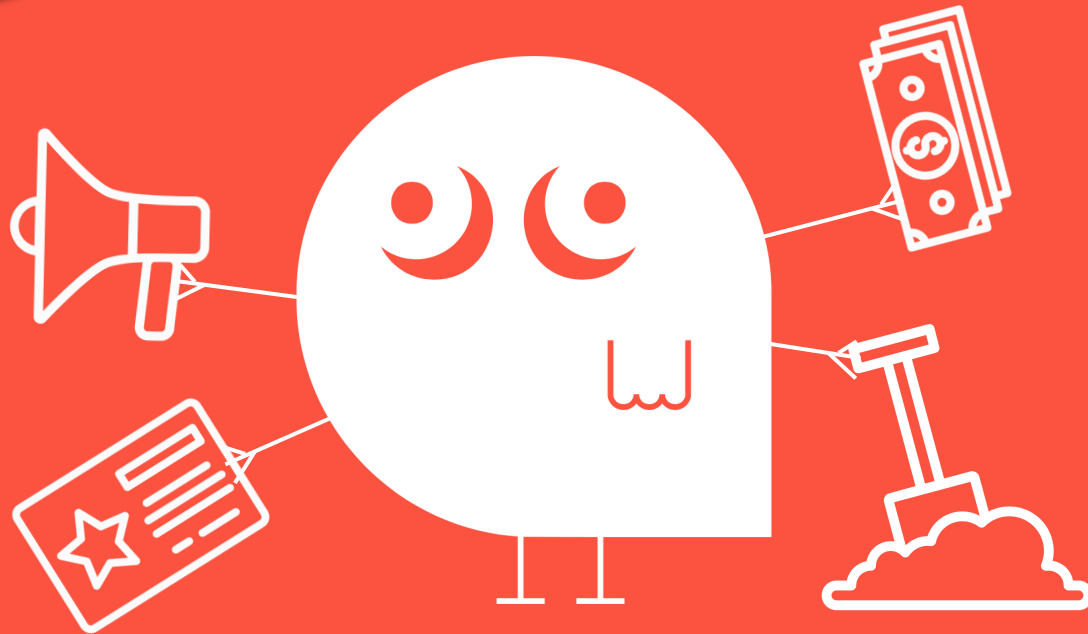
Advocate



These are transactions.



It's nothing
personal !



Implications

of transaction-based relationships

The first transaction defines the relationship

Constituents are pigeon-holed

Does this sound like your organization?

On my count, hit the return key.



BASIS OF RELATIONSHIP

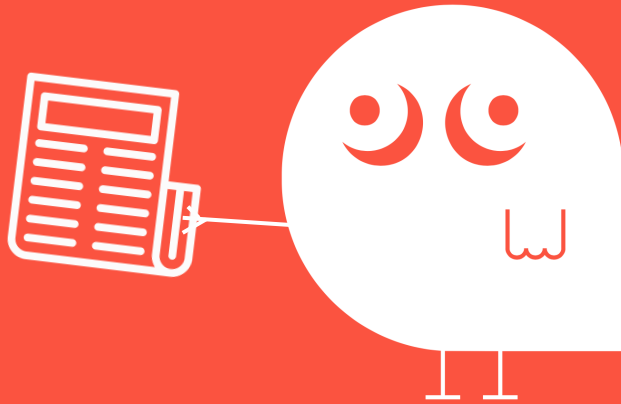
Transaction



Motivation

examples

Subscriber



*a cultural
organization
& think tank*

Receives monthly newsletter



Ladder Climber

Professional Advancement



Heritage Keeper

Connection to Roots



Peace Maker

Global Solutions & Impact



Global Citizen

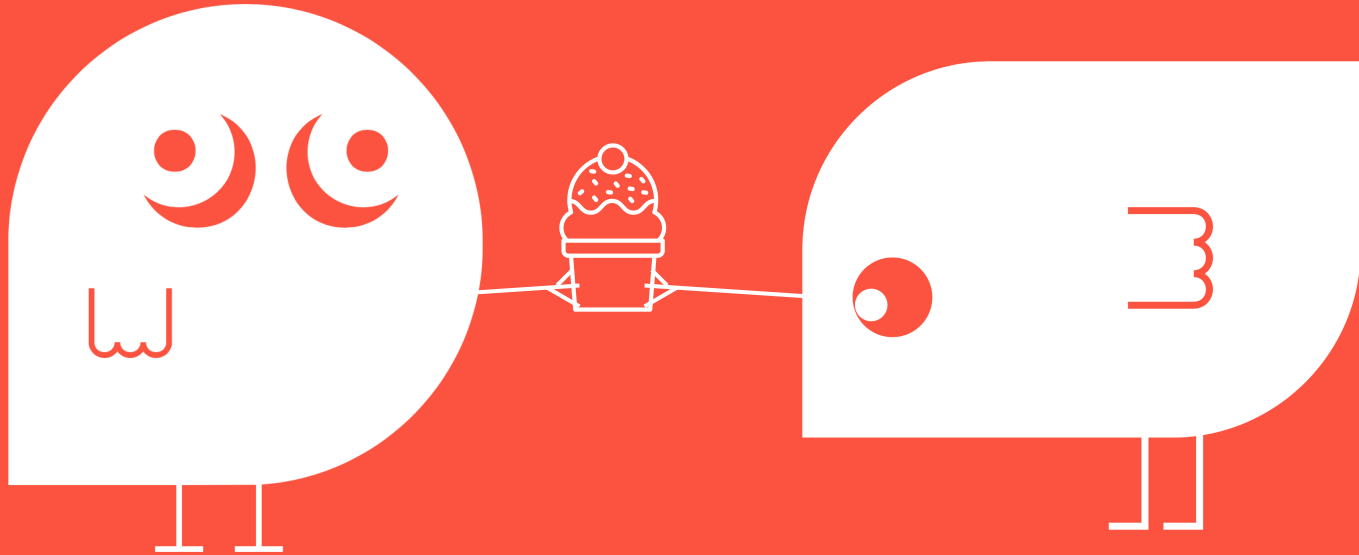
Context in a
changing world



Cultural Explorer

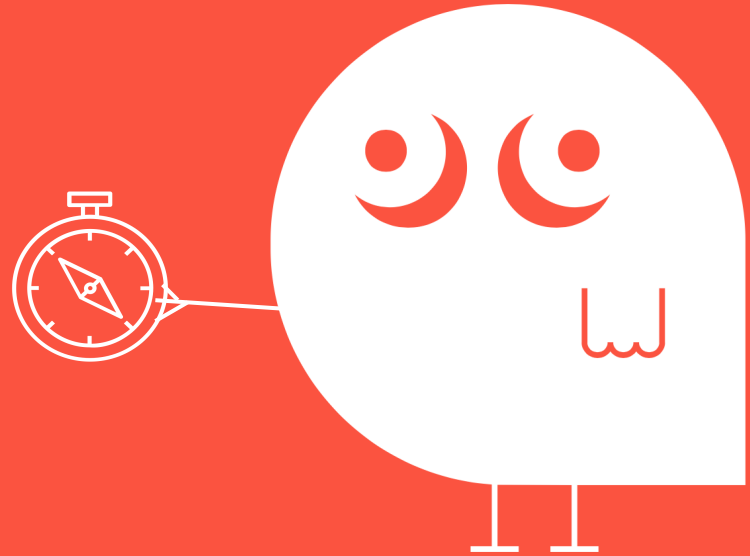
Broader Horizons

Motivation unlocks the exchange of value



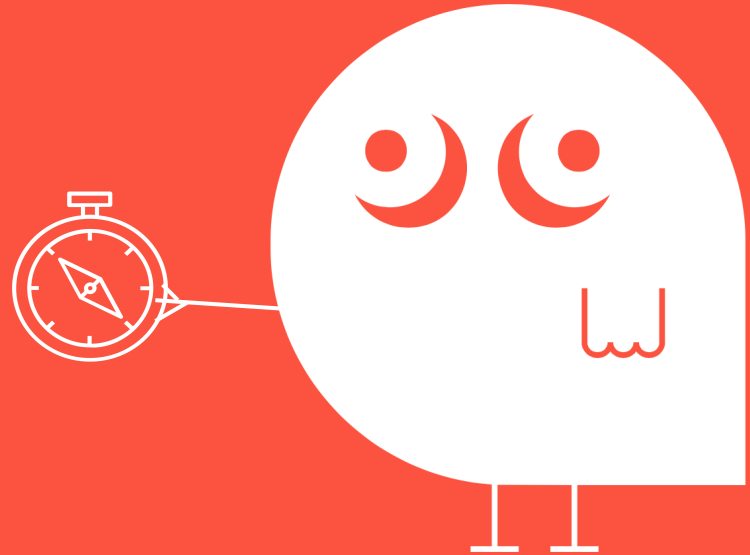
Cultural Explorer

Seeks experiences that expose them to new cultures. Enjoys learning about distant places, people and times. Open by nature, they enjoy new perspectives.



Cultural Explorer

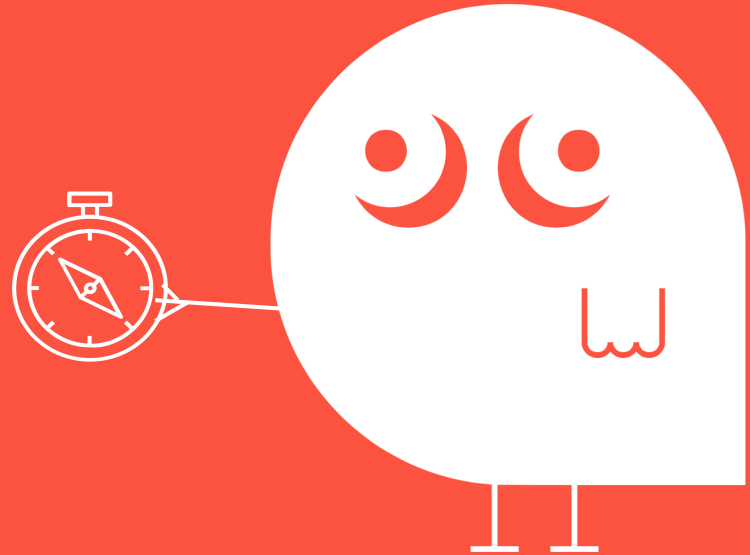
*History
lectures*



Cultural Explorer

*Tastings &
Food*

*History
lectures*

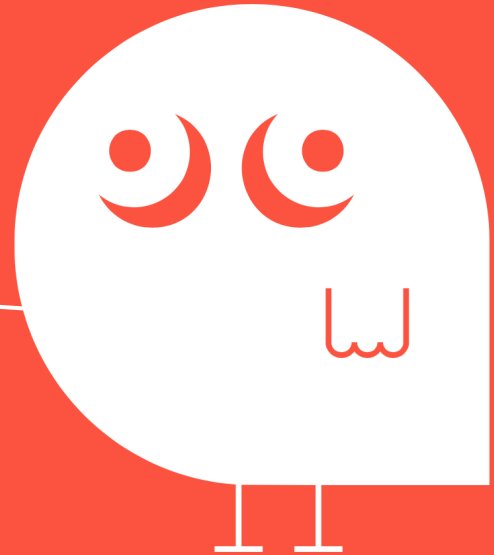


Cultural Explorer

Popular
Culture

Tastings &
Food

History
lectures



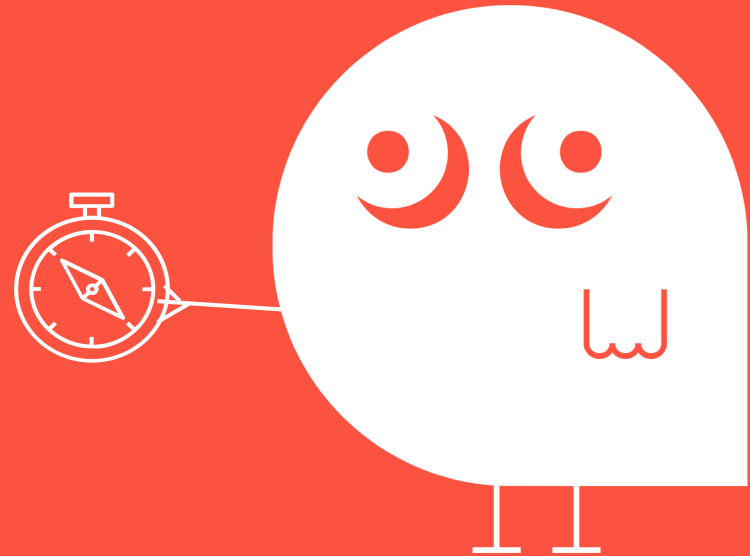
Cultural Explorer

Popular
Culture

Tastings &
Food

Technology
across
cultures

History



Cultural Explorer

Popular
Culture

Tastings &
Food

Technology
across
cultures

History
lectures

Book
Clubs



the solution

Motivation-based segmentation

1. Its intuitive. Everyone in the organization can understand.
2. Fosters relationship-thinking across the whole organization.

Align Operations

around motivation

Transactional Legacies

The transactional legacy can have profound impacts.

Transactional **Systems**

Transactional **Operations**

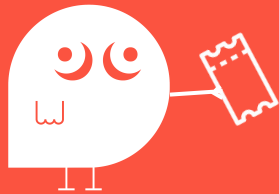
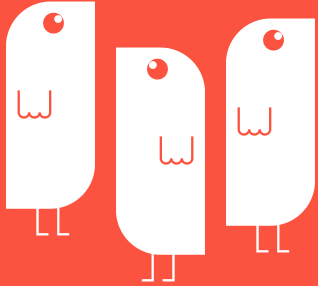
Transactional **Processes**

Transactional **Structure**

Transactional **Relationships**



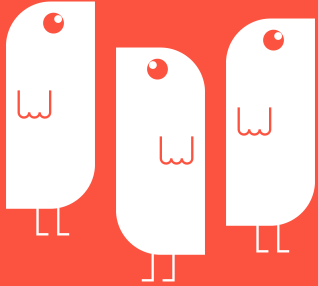
Ticket Team



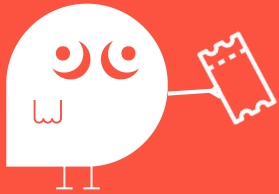
Ticket Buyers



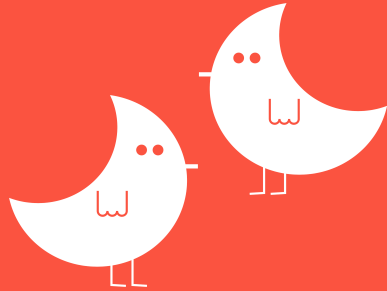
Ticket Team



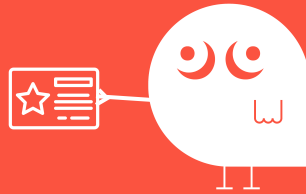
Ticket Buyers



Member Team

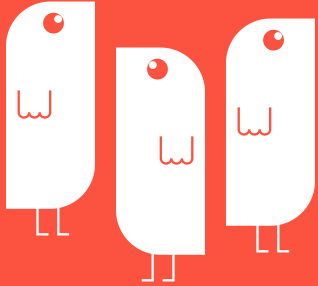


Members

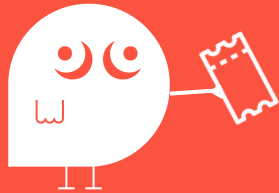




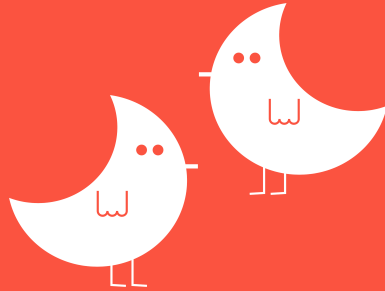
Ticket Team



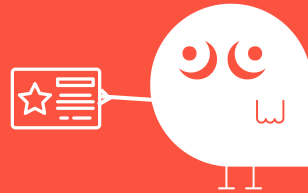
Ticket Buyers



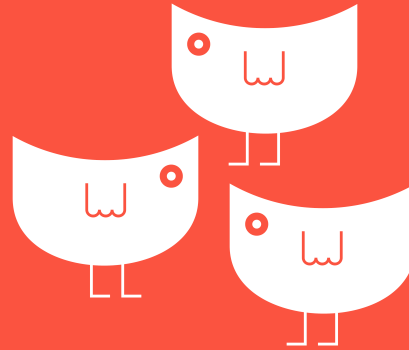
Member Team



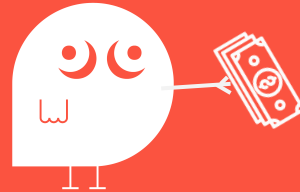
Members



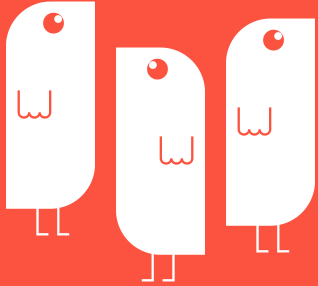
Donor Team



Donors

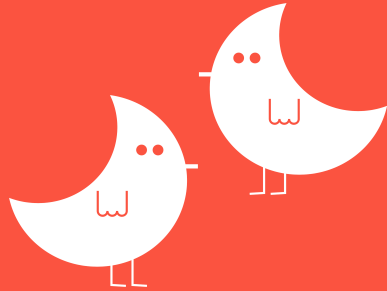


 Ticket Team



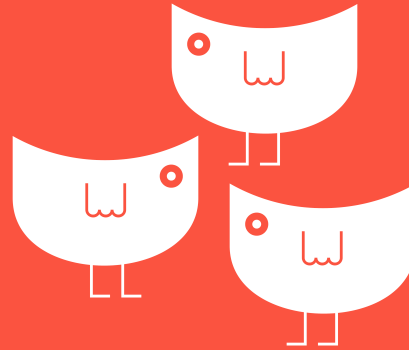
Ticket Buyers

 Member Team



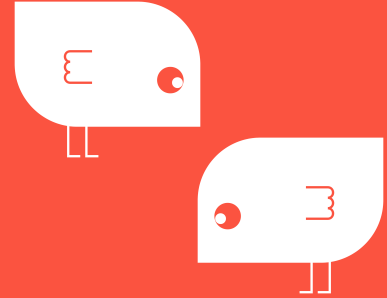
Members

 Donor Team



Donors

 Advocacy Team



Advocates

Consequences

of transactional structures

Customers are again pigeon-holed

Departments hoard constituents

Opportunities and revenue are lost

BASIS OF ORGANIZATION

Transaction



Motivation

3 actions that align your nonprofit

1

Create informal teams around your segments

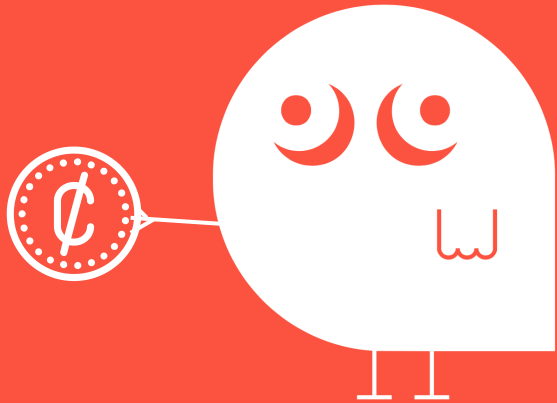
2

Map your constituent experience to satisfy needs over time

3

Align your organization around the constituent's experience and needs

Annual Donor



*regional
independent
cinema*

Gives donations >1 year



The Guardian

Protect the of theater



Community Steward

Support local institutions



Friend Philanthropist

There for my friends



Social Connector

Cinema brings me closer



Film Lover

Give me what I love

Community Steward



strong
community

local
impact

social
connection

Supports local institutions

Community Steward



Gives to local causes including education, religious and recreation. Very active and serves on local boards, and participates in many local fundraisers. Well connected within the community.

Supports local institutions

Community
Steward



PHASES



Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty



Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies
Film Night

Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS

Ladies
Film Night

Community
Picnic



Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies
Film Night



Community
Picnic



Member

Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

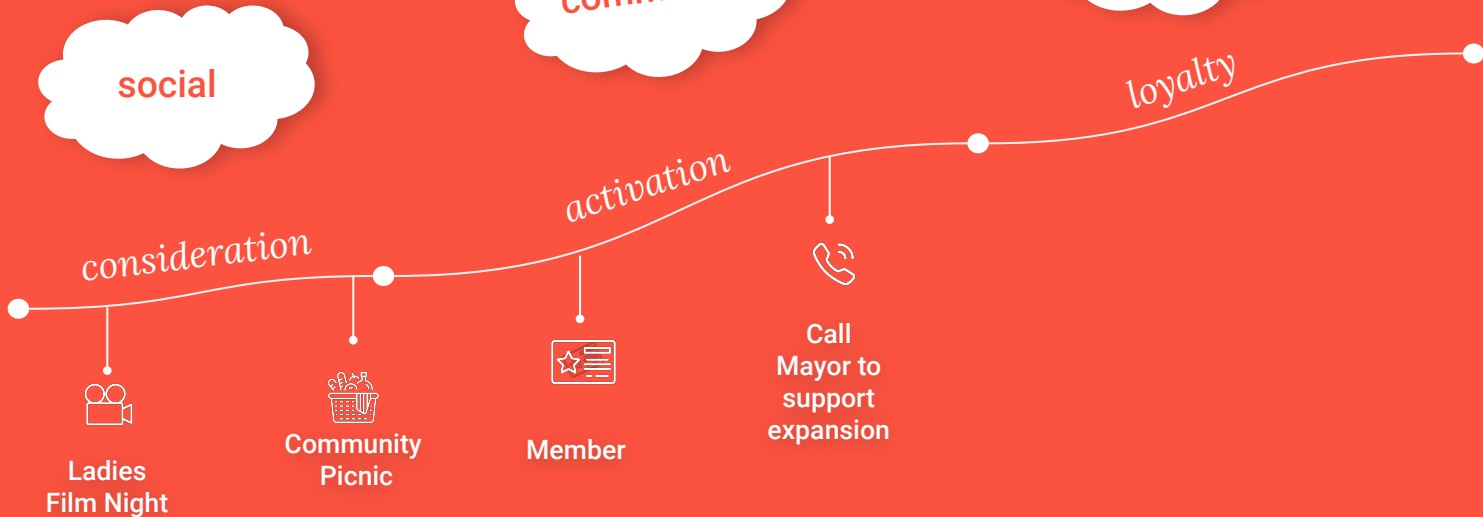
TACTICS

Ladies
Film Night

Community
Picnic

Member

Call
Mayor to
support
expansion



Community Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS

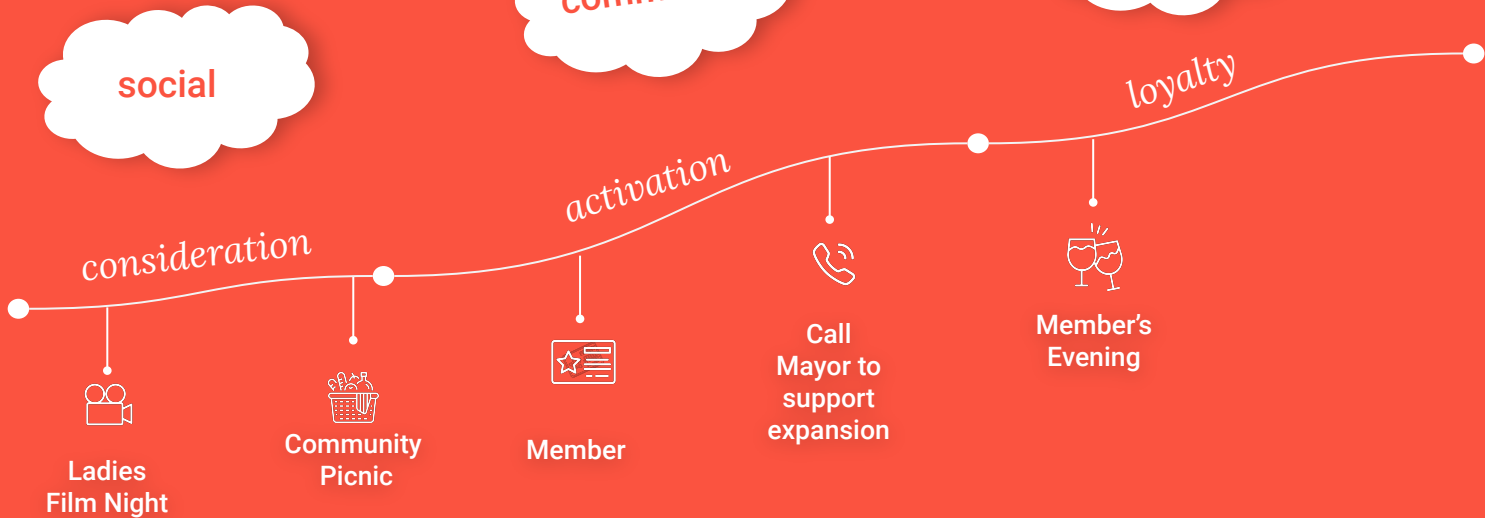
Ladies Film Night

Community Picnic

Member

Call Mayor to support expansion

Member's Evening



Community Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS

Ladies Film Night

Community Picnic

Member

Call Mayor to support expansion

Member's Evening

Host movie club fundraiser



Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS

Ladies
Film Night

Community
Picnic

Member

Call
Mayor to
support
expansion

Member's
Evening

Host
movie club
fundraiser

TEAM

Programming



Community
Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies
Film Night



Community
Picnic



Member



Call
Mayor to
support
expansion



Member's
Evening



Host
movie club
fundraiser

TEAM



Programming



Events

Community Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies Film Night



Community Picnic



Member



Call Mayor to support expansion



Member's Evening



Host movie club fundraiser

TEAM



Programming



Events



Membership

Community Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies Film Night



Community Picnic



Member



Call Mayor to support expansion



Member's Evening



Host movie club fundraiser

TEAM



Programming



Events



Membership



Exec Dir

Community Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies Film Night



Community Picnic



Member



Call Mayor to support expansion



Member's Evening



Host movie club fundraiser

TEAM



Programming



Events



Membership



Exec Dir



Events

Community Steward



NEEDS

social

community

impact

PHASES

consideration

activation

loyalty

TACTICS



Ladies Film Night



Community Picnic



Member



Call Mayor to support expansion



Member's Evening



Host movie club fundraiser

TEAM



Programming



Events



Membership



Exec Dir



Events



Development

What happens if
we get this right?

Motivation

You are innovative.

You are relevant.

You grow
lifetime value.



Will she ever
leave us
alone?

Conceptually, is this easy to understand or is it hard to grasp?

On my count, hit the return key.



In practice, would this easy be easy to implement or difficult?

On my count, hit the return key.



Would it require small adjustments or deep change?

On my count, hit the return key.



Q&A Session



I'm releasing a segmentation toolkit next month.

Email: jan@alinesstrategy.com

Subject line: **"Send me the toolkit"**



w. www.alinestrategy.com

e. jan@alinestrategy.com

m. 212-795-4044

l. www.linkedin.com/in/jan-kaderly/

calendar. calendly.com/alinestrategy

Resources

[TRIZ and other Liberating Structures](#)

[The Differentiated University](#)

[Playing to Win](#)

[Modern Monopolies](#)

[What is Strategy?](#)

[*Seven Faces of Philanthropy*](#)

[Designing Your Organization](#)

[The Customer Experience Book](#)
[Change for Good](#)

[Econtalk with Charlan Nemeth](#)

[Sensemaking: Framing and acting in the unknown](#)