

## CASE STUDY

# A Powerful GTM, By Shifting From Lagging to Leading Metrics

*SQA Group partners with largest RI nonprofit to fuel go-to-market impact*

## OVERVIEW

Following the completion of a multi-year strategic plan, the United Way of Rhode Island (UWRI), a 100+ year nonprofit and community foundation, partnered with SQA Group to create a data-backed go-to-market strategy to fuel donor giving, connectedness, and engagement.

Specifically, SQA Group leveraged its Metrics Finder methodology to uncover a new approach to UWRI donor segmentation, personalization, content marketing, and omni-channel focus, by elevating new KPIs, establishing a data-powered framework to measure progress, and providing strategy recommendations to best aim the marketing and business development team.

## CHALLENGE

The UWRI leadership team was interested in modernizing its go-to-market strategy, from using next-gen segmentation to custom personalization to new KPI benchmarking and goal setting. What's more, the team wanted to measure GTM success beyond just counting financial giving and donor contributions, as there are other criteria that lead to brand growth and viability.

Specifically, UWRI wanted to identify its ideal quality supporter of today, from those who contribute financially to those who volunteer and actively refer other organizations to contribute to UWRI.



United Way of Rhode Island

## RESULTS

Upon shifting from lagging to leading metrics and building new frameworks to measure progress against goals, UWRI was able to immediately take action on the following:

**Creating Core Values:** The UWRI leadership team enlisted the help of their Board of Directors, supporters, and larger community to create core values to measure.

**Hiring a Head of Content:** The UWRI hired a Head of Content to enact the content strategy changes that came from the newly identified GTM metrics.

**A New Story:** UWRI was able to uncover new messaging threads to weave into their story of who they are today to best align to their new ideal supporter profile.

By identifying a new ideal supporter profile, UWRI would be able to better aim the activities and strategies of their marketing, business development, and fund development teams.

In the same vein, they wanted to then align their content and omni-channel strategy to appeal to a broader range of supporters. “We’re not your grandpa’s United Way,” said Cortney Nicolato, CEO of UWRI. As such, it was essential for UWRI to adjust its organizational story and brand approach to connect with its new definition of a quality supporter.

## SOLUTION

Through a series of design thinking workshops and data analysis review, SQA Group's Data and Analytics team helped UWRI arrive at a new definition of what it means to be a quality supporter, as well as new KPIs and OKRs that would set the aim and focus of the team toward cultivating better relationships with their newly defined quality supporters.

During the engagement, UWRI redefined its ideal supporter as someone who has a relationship with the organization that is “durable, multi-directional, and rooted in shared values.” SQA Group then created a data methodology and framework to measure these attributes, by finding new metrics such as:

**Lapsed Donor Win-Back Rate:** The total number of previously lapsed donors successfully won back through an omnichannel strategy.

**Value Perception Strength:** How the public perceives UWRI as embodying the organization’s stated values – from the point of view of both current supporters and those with no relationship to the organization.

### **Customer Satisfaction Score & Feedback Response Time:**

- Customer Satisfaction based on a “customer’s” experience providing feedback to UWRI
- First Response Time, the duration between when feedback was received by UWRI and the first correspondence back to the individual submitting the feedback

SQA Group helped UWRI uncover 16 new metrics, along with recommendations for how to adjust the team’s strategies and day-to-day behaviors to hit newly set targets for the new metrics, and methods for collecting and visualizing data.



*Oftentimes, we look at data as a measurement of what happened. The SQA Group's Metrics Finder is about looking at data as a way to figure out what we can make happen.*

*We now have a common language when it comes to how we think about quality relationships, the new actions and behaviors that will drive connectedness, and new ways to measure.*

*-Rob Hancock, UWRI, Senior Director of Marketing and Communications*