How to use a CRM to Recruit and Retain Volunteers.

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Service to others is the rent you pay for your room here on Earth.
Working with Volunteers

Volunteer MBC

- Youth Program Coordinator
- 40 Hours of Community Service
- Problem: Organizations were not getting the best volunteers
Today’s Agenda

Volunteers are a vital part of your work. How are you managing them?

• Best practices for volunteer recruitment
• Best practices for retaining volunteers
• How to use a CRM to get (and keep) the best volunteers
Recruiting volunteers.
We need volunteers!
We need volunteers to graduate!
The Problem

Volunteer engagements could end up being **meaningless** to the volunteer. This can lead to:

- Volunteers with disengaged work
- Clock-watching while on their shift
- Lost time and effort for both the volunteer and the organization.
The solution. Evaluate volunteer opportunities and applicants based on more than just availability.
Volunteer posting = Job posting

Volunteer engagements could end up being meaningless to the volunteer. This can lead to:

- There are required skills
- Some roles require experience
- There should be a genuine desire on the part of the applicant.
Mutually beneficial relationship

The worst thing you can do is make a volunteer opportunity completely one-sided.

- The best volunteer opportunities are **beneficial for BOTH parties**
- The benefits should be **clear and obvious** to both sides
- Part of the benefit should be skill-building
Relationship building

Your focus should be on building a lasting relationship with your donors. It is should not be a transactional relationship.

- Get to know your donors with full profiles
- Find out what they are passionate about (and incorporate that into their work)
- Keep track of their milestones, and acknowledge them
Retaining volunteers.
We have great volunteers!
This program is getting stale..
Is there anything else I can do?
We’ve always done things this way.
I’m looking for another opportunity.
WAIT!!
We appreciate you!
The Problem

Often, NPOs are being reactive when it comes to retaining talented volunteers.

- You lose out on opportunities to acknowledge volunteers.
- Nonprofits don’t listen to their volunteers enough.
- There’s not enough focus or effort on keeping volunteers happy.
- It’s easier to keep volunteers than it is to recruit new ones.
The solution. Be proactive by treating and managing volunteers as though they are part of the organization.
Training and investment

You can’t just throw volunteers into the fire. You have to give them support.

When volunteers are trained, they perform better.

It’s easy to get confused and frustrated when there is no training.
Have concrete goals

Measuring success is an important part of retaining volunteers. Start with some goals.

**Get SMART.** Set goals that you can measure against.

**You add a sense of responsibility.** When volunteers are responsible for meeting a goal, they take it more seriously.

**There is accountability.** When clear goals at the beginning, volunteers are able to hold themselves accountable.
Get organized

A major part of a volunteer’s experience is how organized you are as a manager.

**You are the conduit to the NPO.** The volunteers get their information from you.

**Create tasks.** If there are things you’d like volunteers to complete, communicate it to them.

**Get on the same page.** Establish a communication schedule and method that works for both sides, and stick to it.
Recognize contribution

It seems like a no-brainer – but THANK YOUR VOLUNTEERS.

- Thank them for their support.
- Thank them for their work. (Over and over again.)
- Show them the impact of their work.
- Share accolades from other colleagues.
Using a CRM to recruit and retain volunteers.
Recruiting Volunteers

As a recap, we learned that:

- You should treat volunteer roles like job roles
- You should create a mutually beneficial relationship
- You should focus on relationship-building
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Treating volunteer roles like job roles:

- Track interest by looking at email interests
- Keep track of all communications
- Have one place for all your notes
- Create groups or tags based on stage of process
Recruiting Volunteers

- Open Rates
- Click Rates
- Segmenting those results

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Recruiting Volunteers

- Create Tags (or groups) based on the different volunteer programs you have
Retaining Volunteers

As a recap, we learned that:

• You should train your volunteers
• You should set concrete goals
• You should always be organized
• You should recognize volunteer contributions
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Retaining Volunteers

Setting Goals
Retaining Volunteers

Staying organized
Retaining Volunteers

Recognizing volunteers
CRM helps volunteer managers

Being creative with your CRM will help you manage volunteers and get more out of that relationship.

- **Recruit the best volunteers.**
- **Retain the best volunteers.**
- **Work more efficiently.**
Thank you!
Let’s chat!
philip.manzano@networksforchange.org
Empowering small nonprofits to make a **BIG impact.**