



# How to use a CRM to Recruit and Retain Volunteers.

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Presented for Connecting Up and TechSoup NZ

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A young man with short dark hair, wearing a light-colored shirt and a dark jacket, is shown from the chest up. He has a thoughtful expression, with his hand near his chin. The entire image is overlaid with a semi-transparent orange filter. The text "Service to others is the rent you pay for your room here on Earth." is written in white, bold, sans-serif font across the middle of the image.

**Service to others** is the rent you pay for  
your room here on Earth.



# Working with Volunteers

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## Volunteer MBC

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

# Today's Agenda

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**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

A group of four diverse people (two women and two men) are smiling and posing together outdoors. They are all wearing blue t-shirts with the word 'VOLUNTEER' printed on them in a light-colored, sans-serif font. The background is slightly blurred, showing what appears to be a park or sports field. The entire image is overlaid with a semi-transparent orange filter.

# Recruiting volunteers.





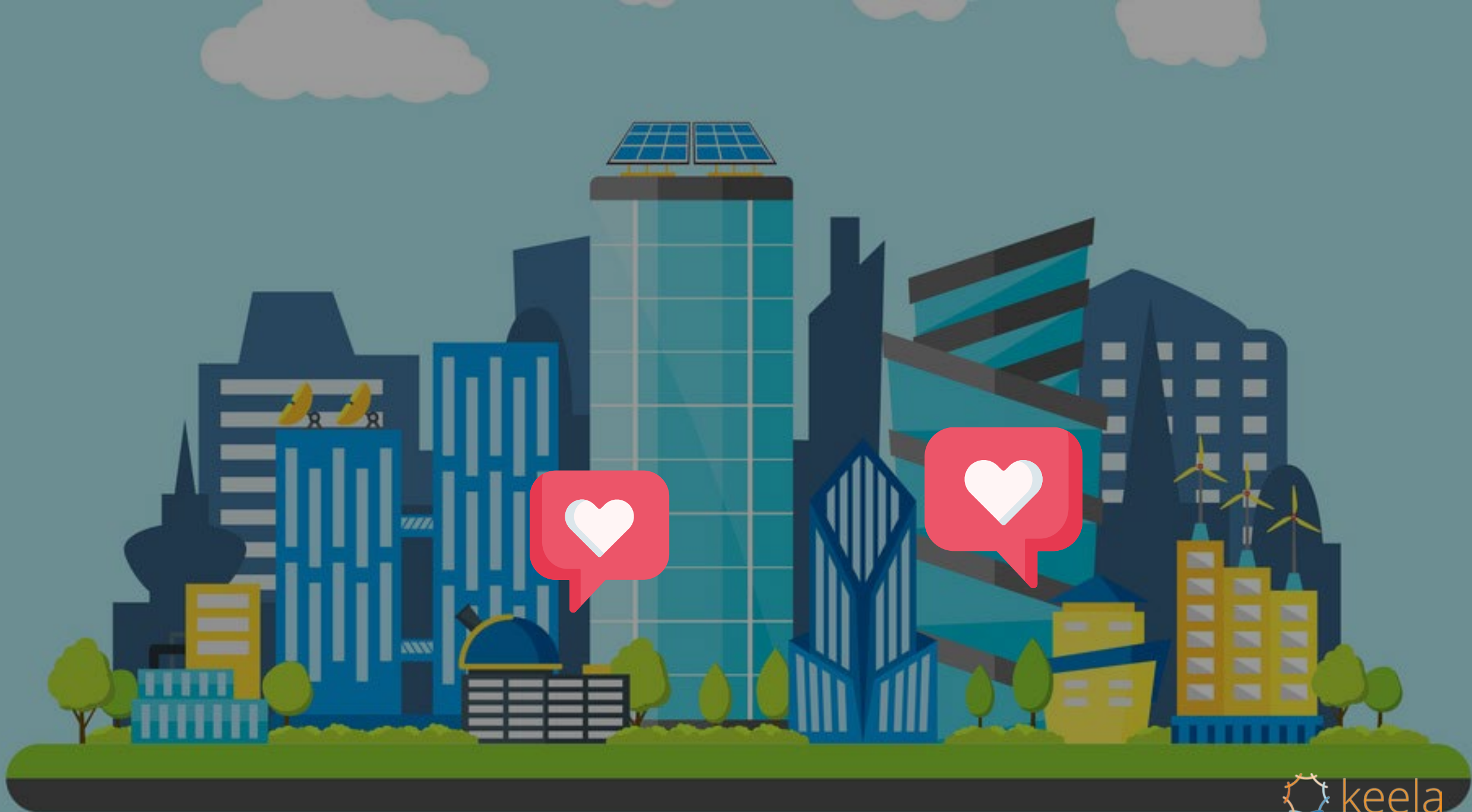


**We need volunteers!**



We need volunteers  
to graduate!



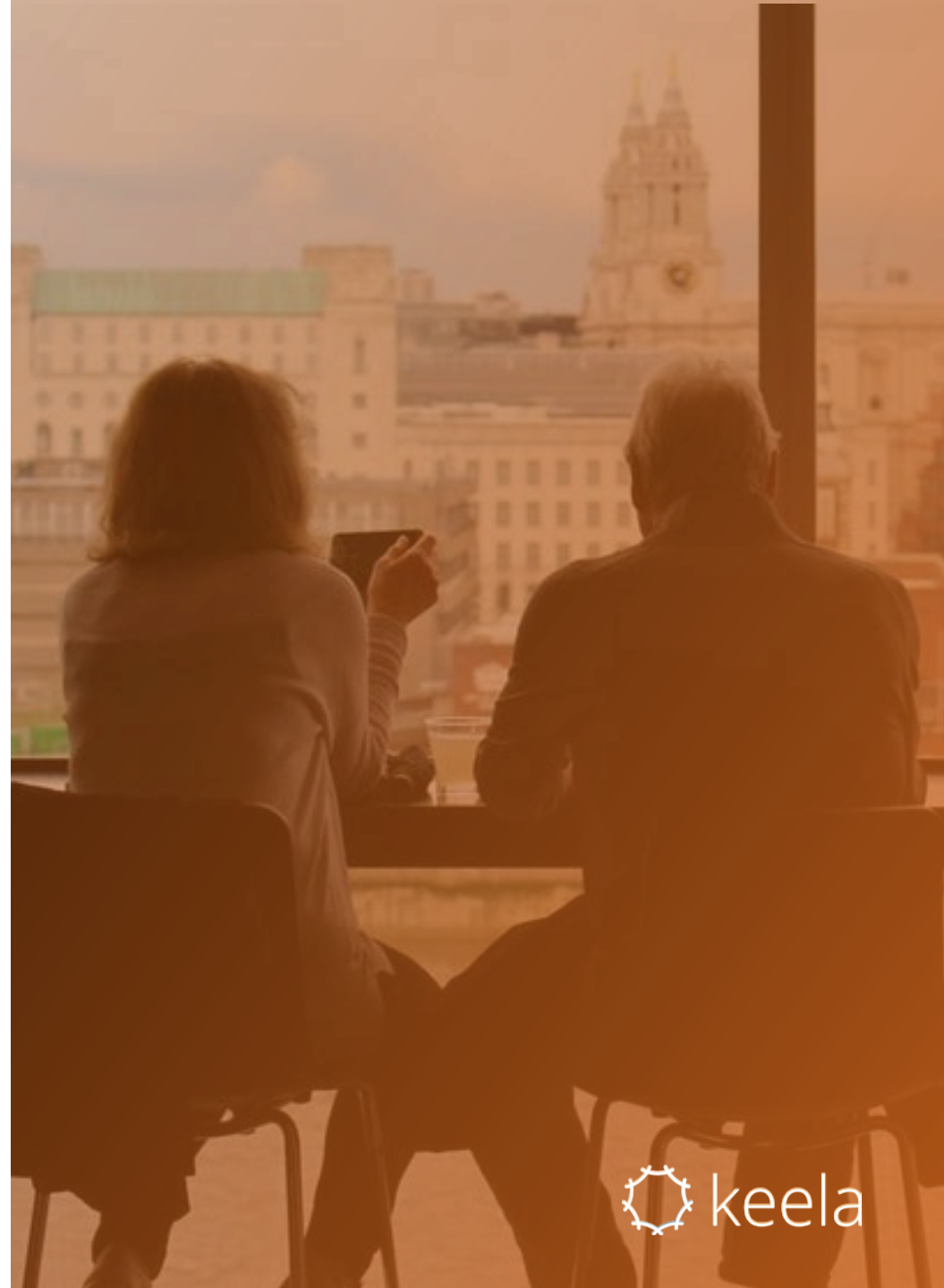


# The Problem

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.**

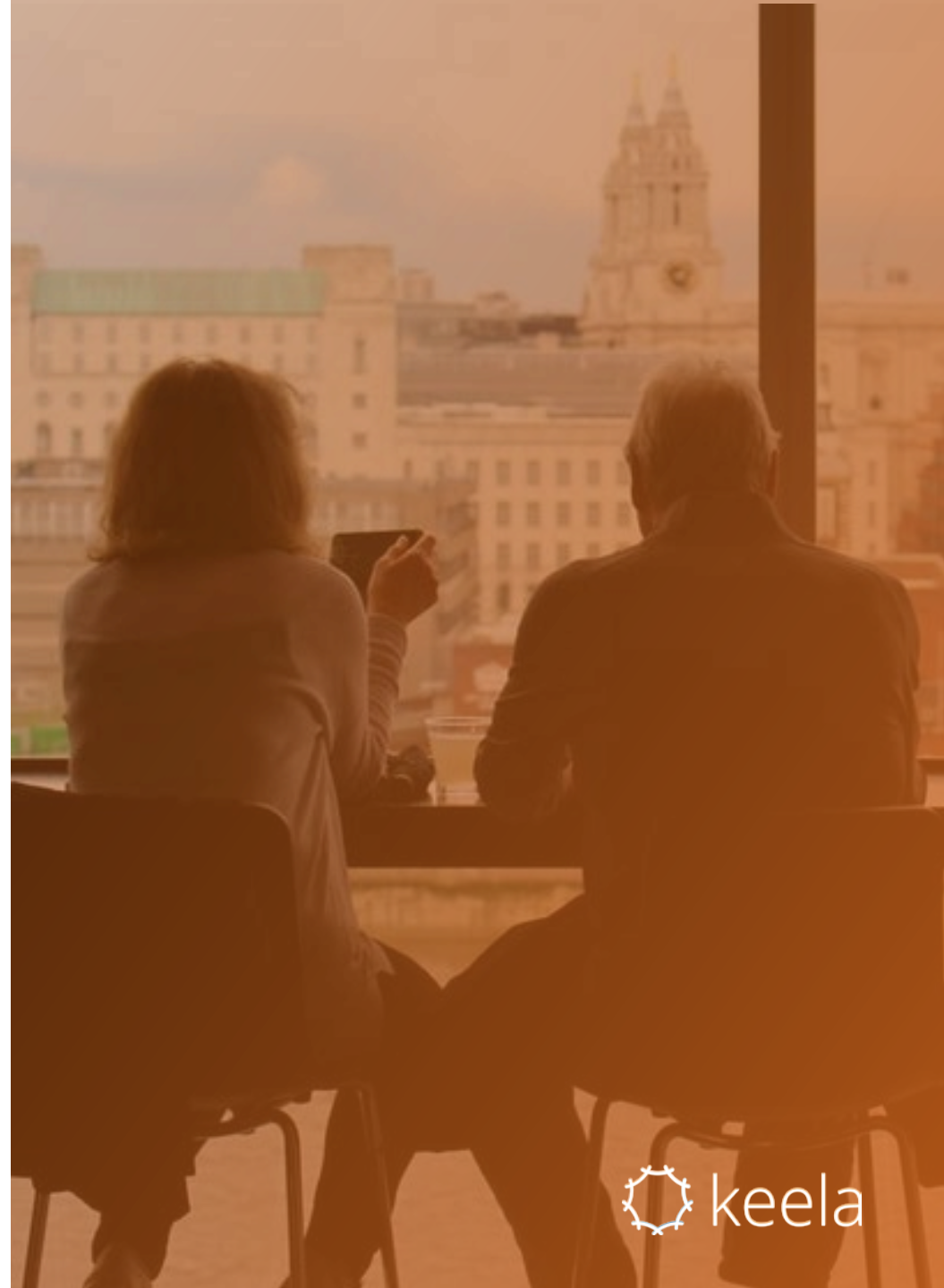


# Volunteer posting = Job posting

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.

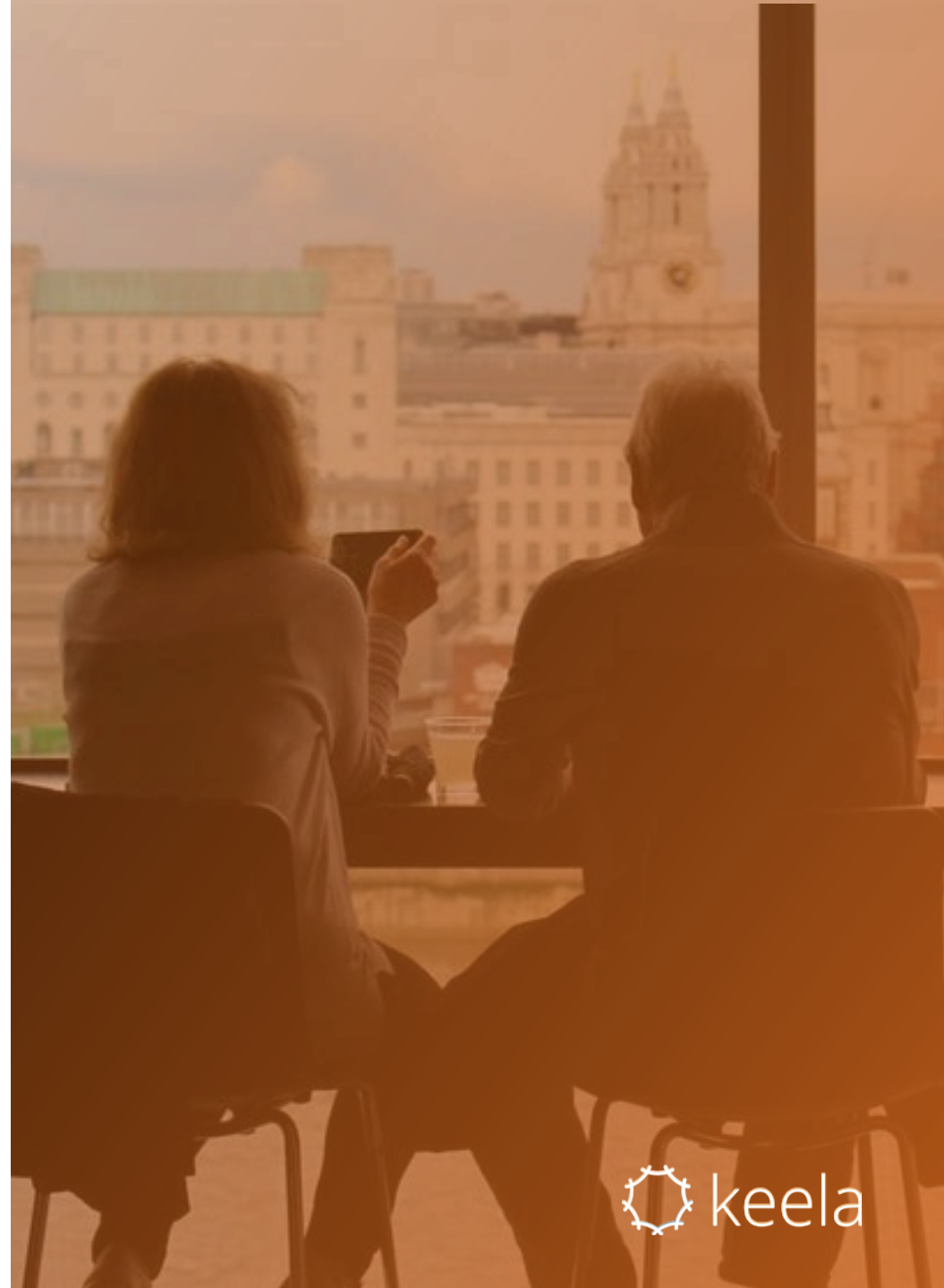


# Mutually beneficial relationship

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

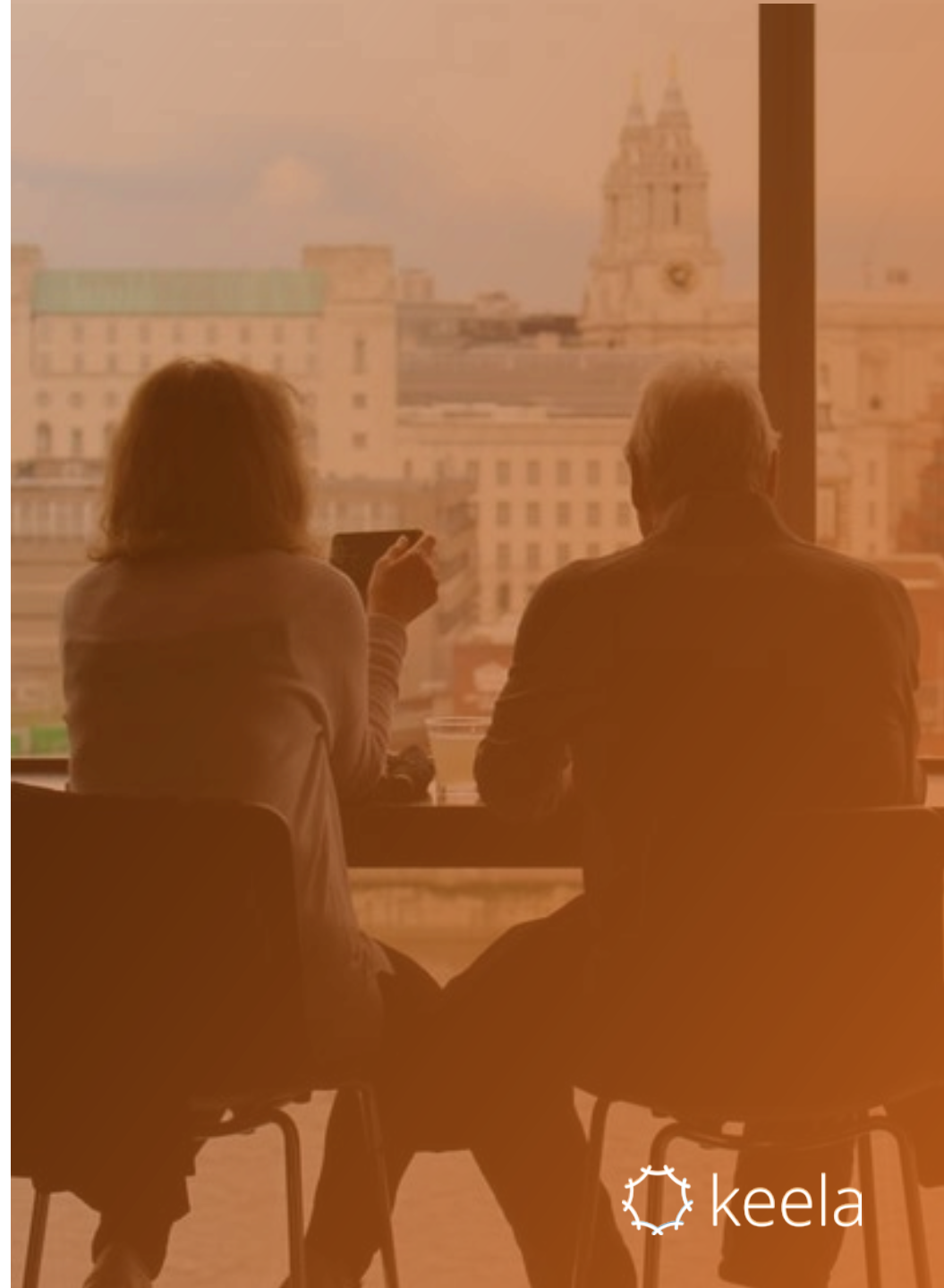


# Relationship building

Your focus should be on building a lasting relationship with your donors. It 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







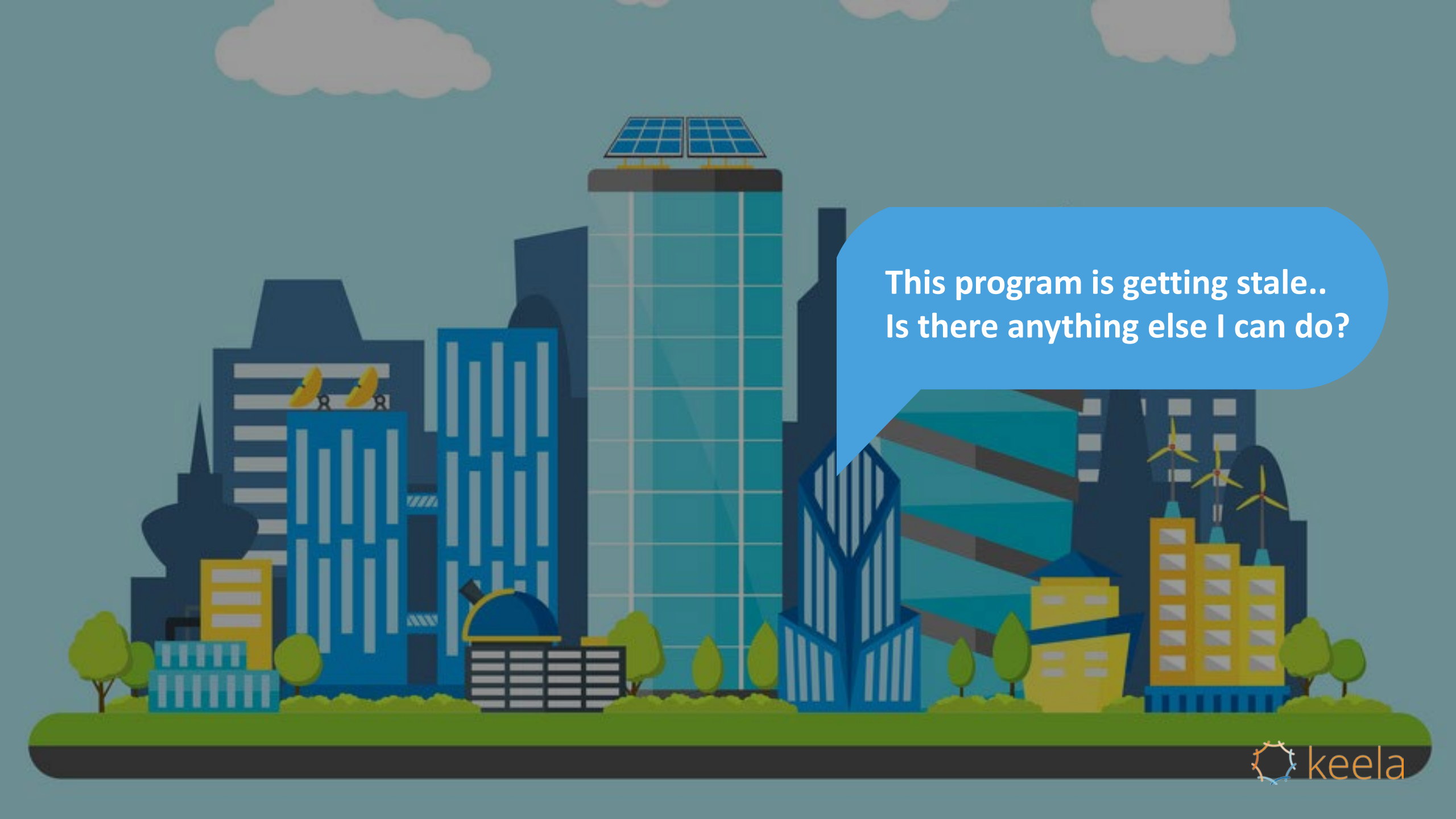
**Retaining** volunteers.



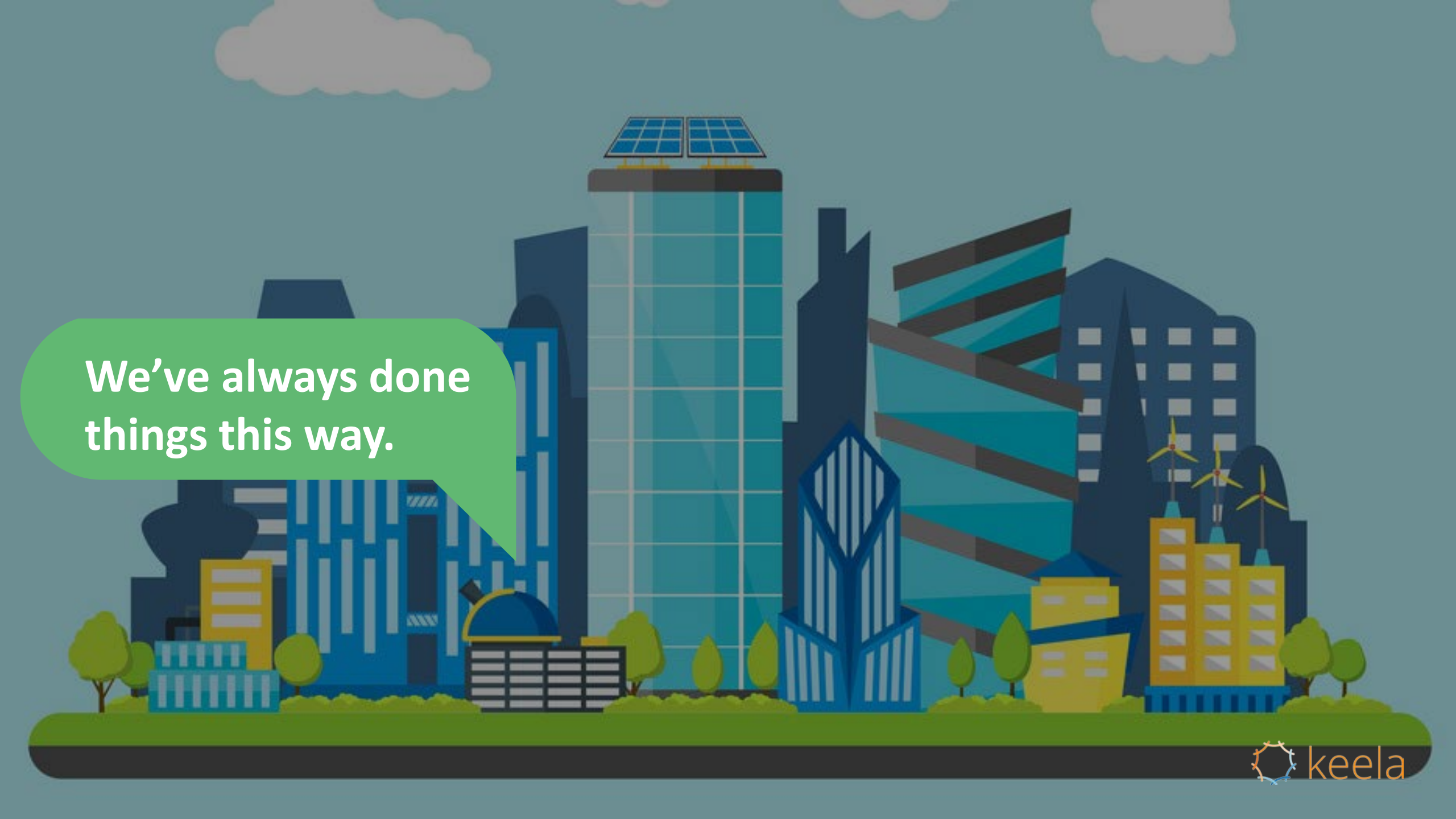


We have great  
volunteers!





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.**



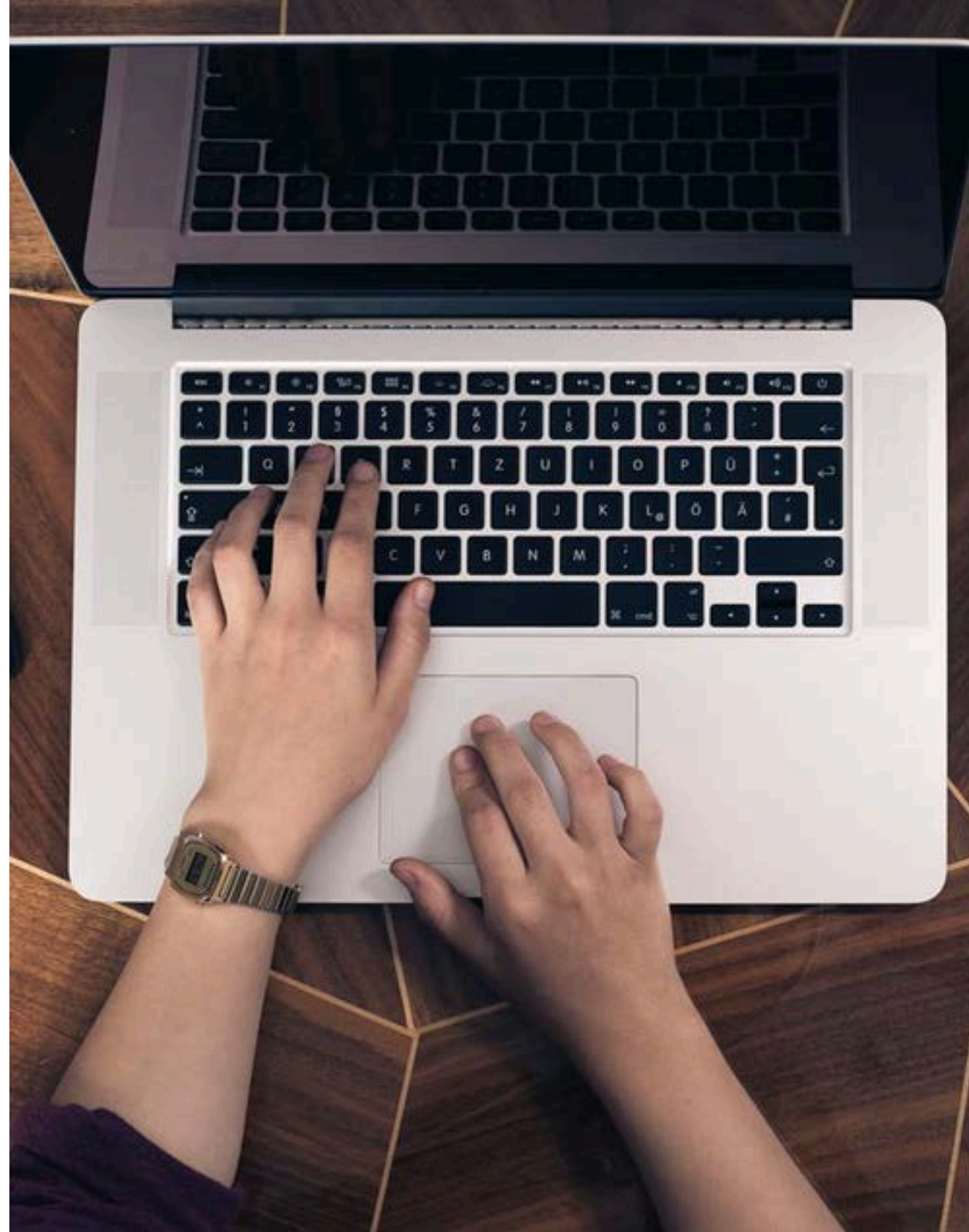
**Nonprofits don't listen to their volunteers enough.**

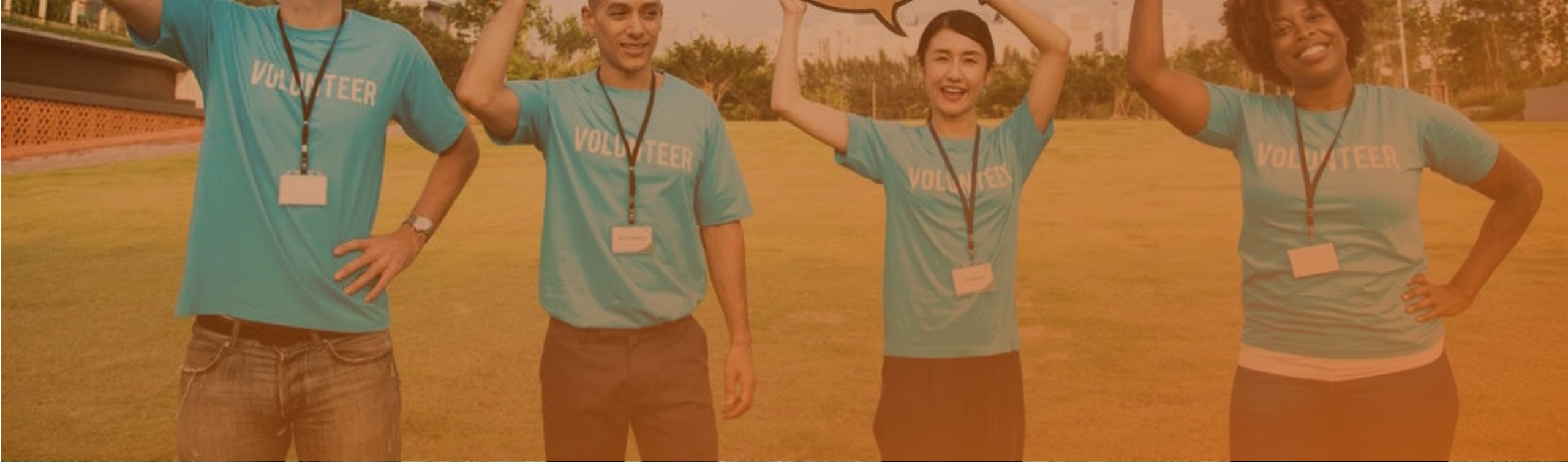


**There's not enough focus or effort on keeping volunteers happy.**



**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.**

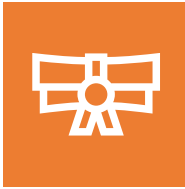


# Have concrete goals

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



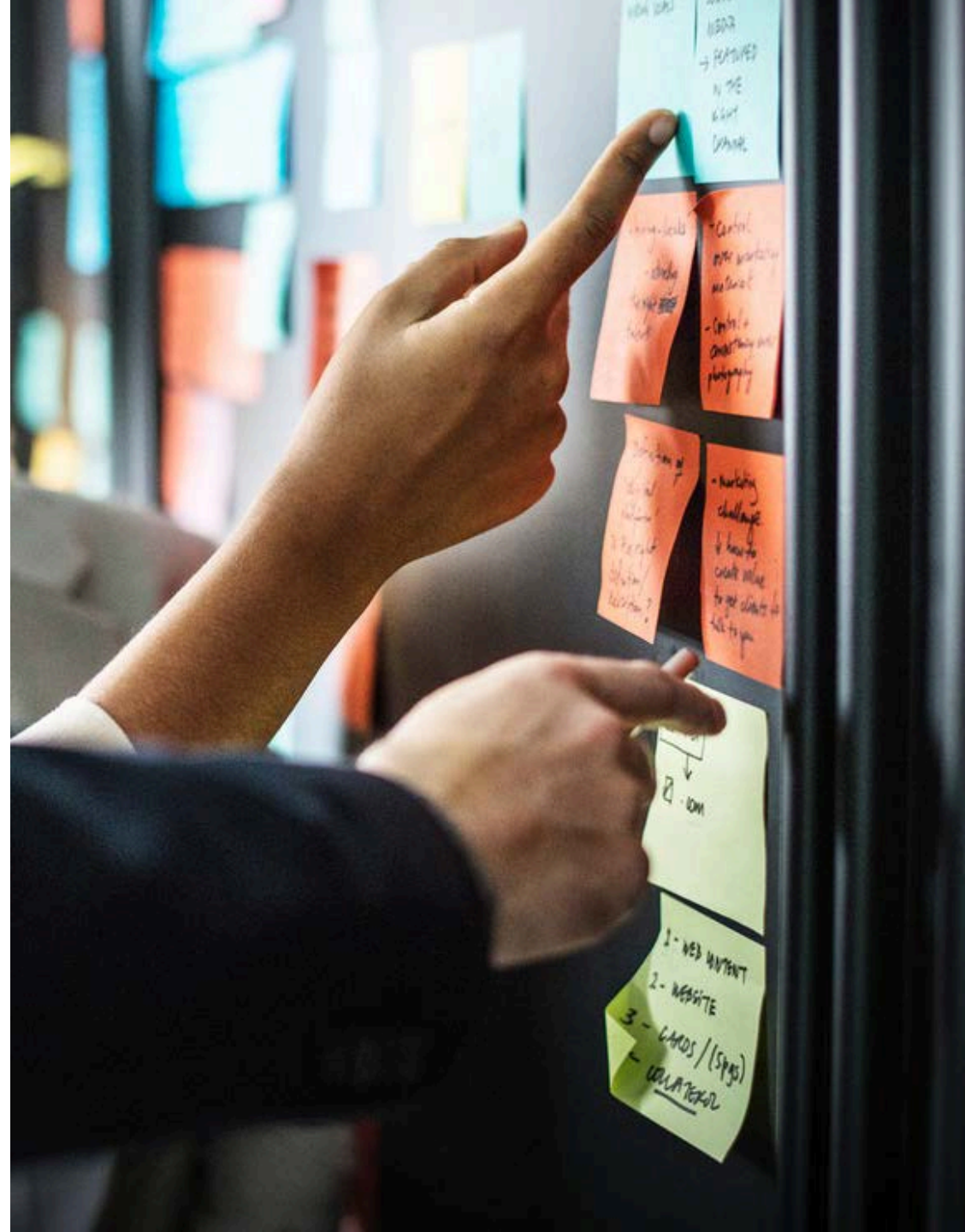
**Get SMART.** Set goals that you can measure against.



**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.**



A group of four diverse people (two women and two men) are walking towards the camera on a grassy field. They are all wearing light blue t-shirts with the word "VOLUNTEER" printed in orange. The background shows a fence and some trees under a clear sky. The entire image has an orange overlay.

**Using a CRM** to recruit and retain  
volunteers.

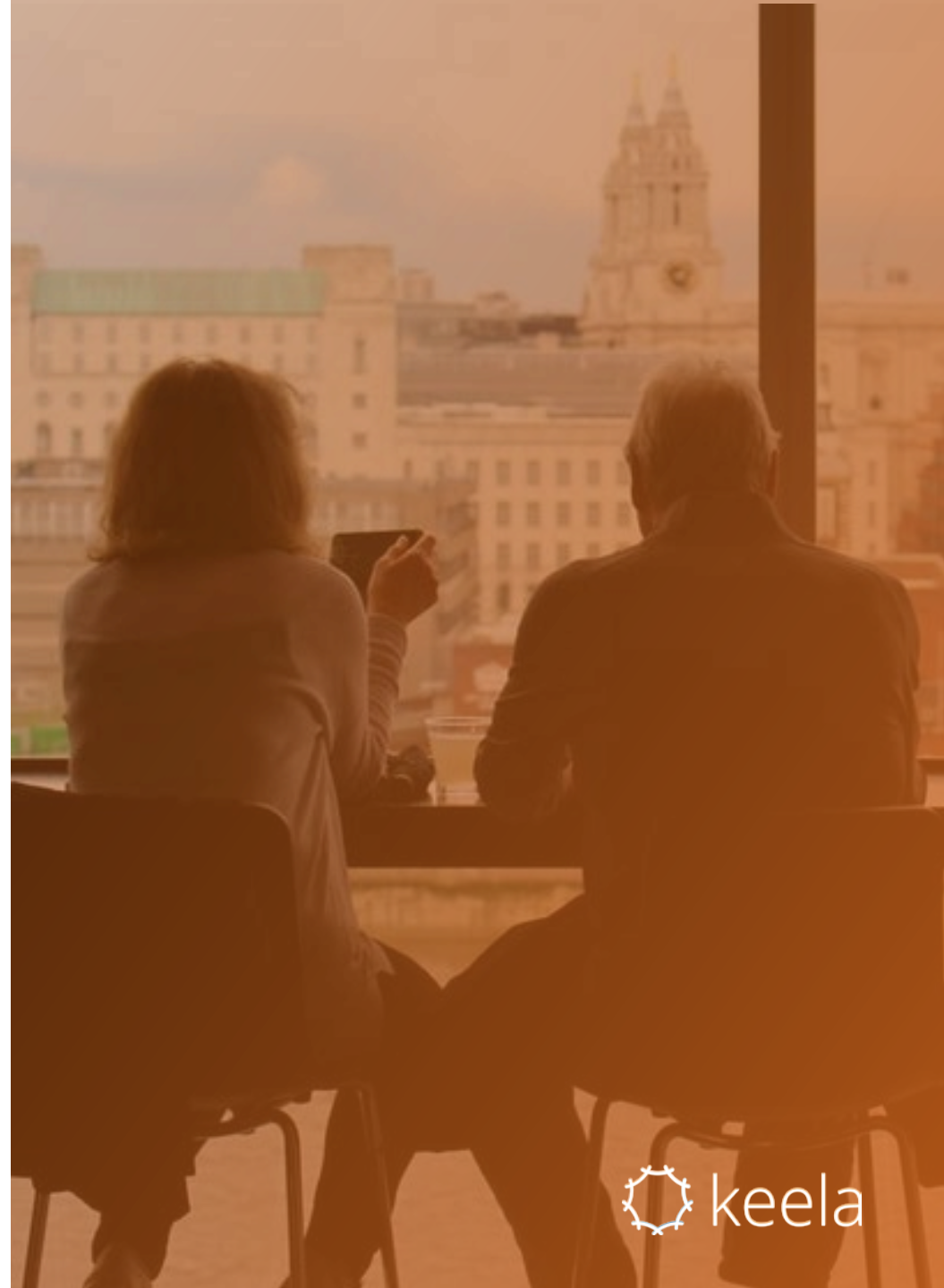


# Recruiting Volunteers

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



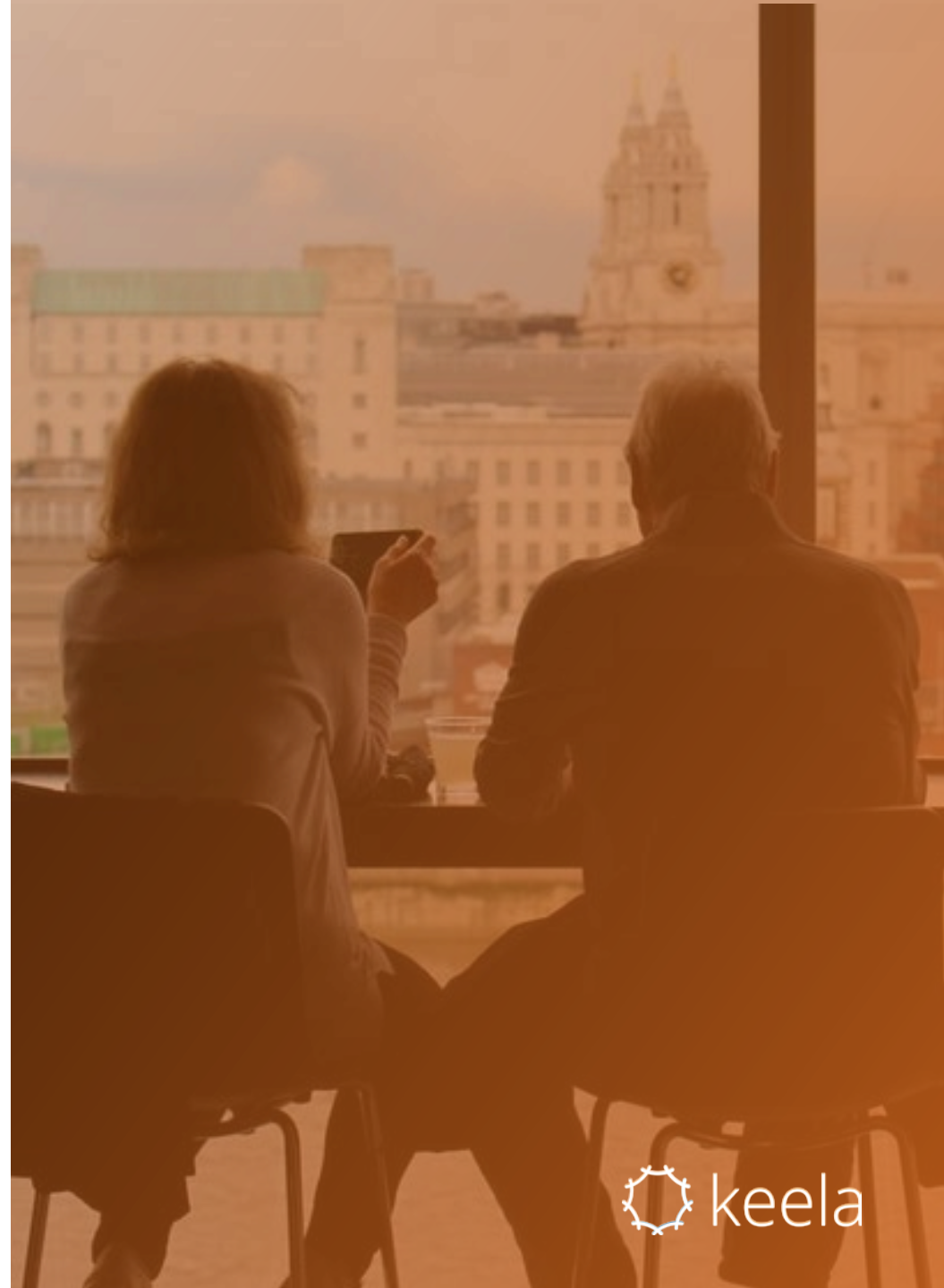


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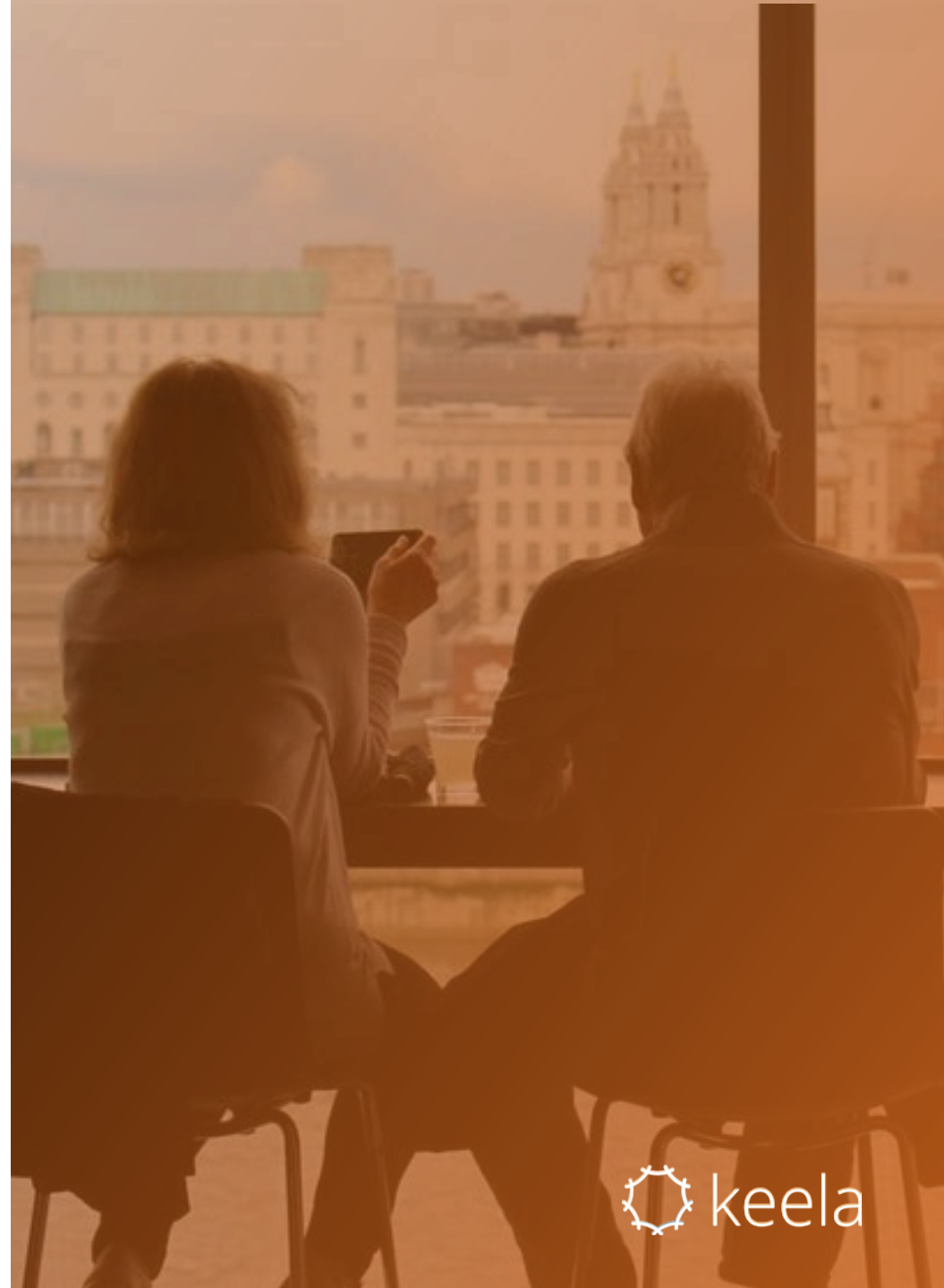


# Recruiting Volunteers

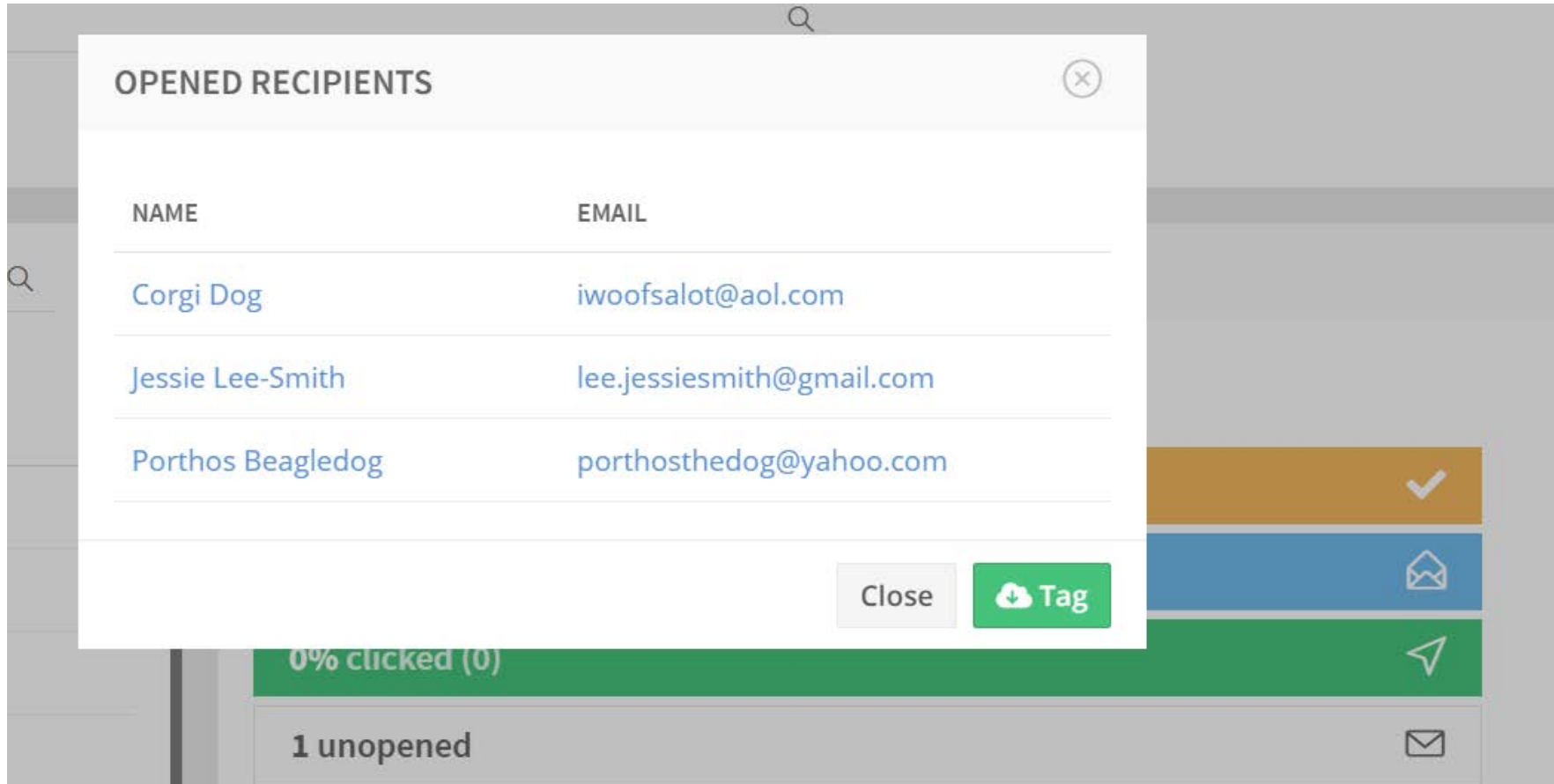
Treating volunteer roles like job roles:



- 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



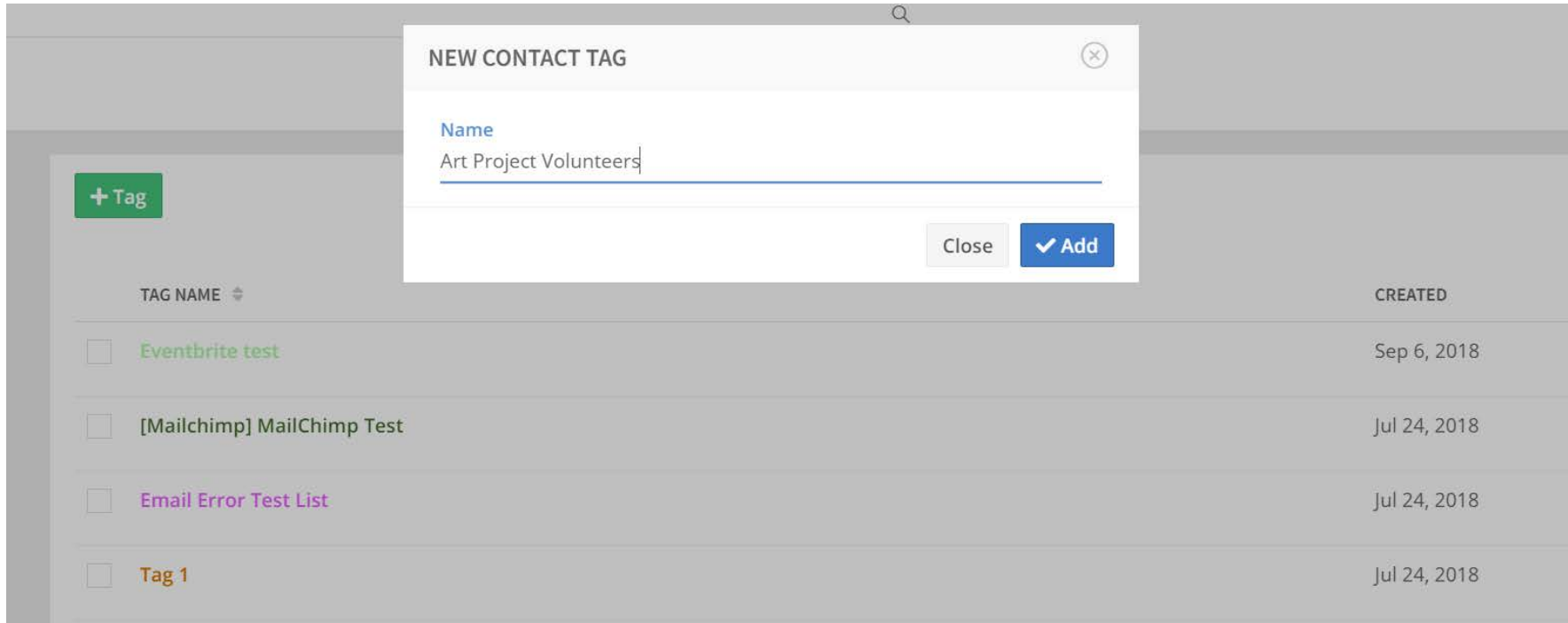
# Recruiting Volunteers



- Open Rates
- Click Rates
- Segmenting those results



# Recruiting Volunteers



The screenshot displays the Keela interface for managing contact tags. A modal window titled 'NEW CONTACT TAG' is open, showing a text input field with the name 'Art Project Volunteers' and buttons for 'Close' and 'Add'. Below the modal, a table lists existing tags with columns for 'TAG NAME' and 'CREATED'.

TAG NAME	CREATED
<input type="checkbox"/> Eventbrite test	Sep 6, 2018
<input type="checkbox"/> [Mailchimp] MailChimp Test	Jul 24, 2018
<input type="checkbox"/> Email Error Test List	Jul 24, 2018
<input type="checkbox"/> Tag 1	Jul 24, 2018

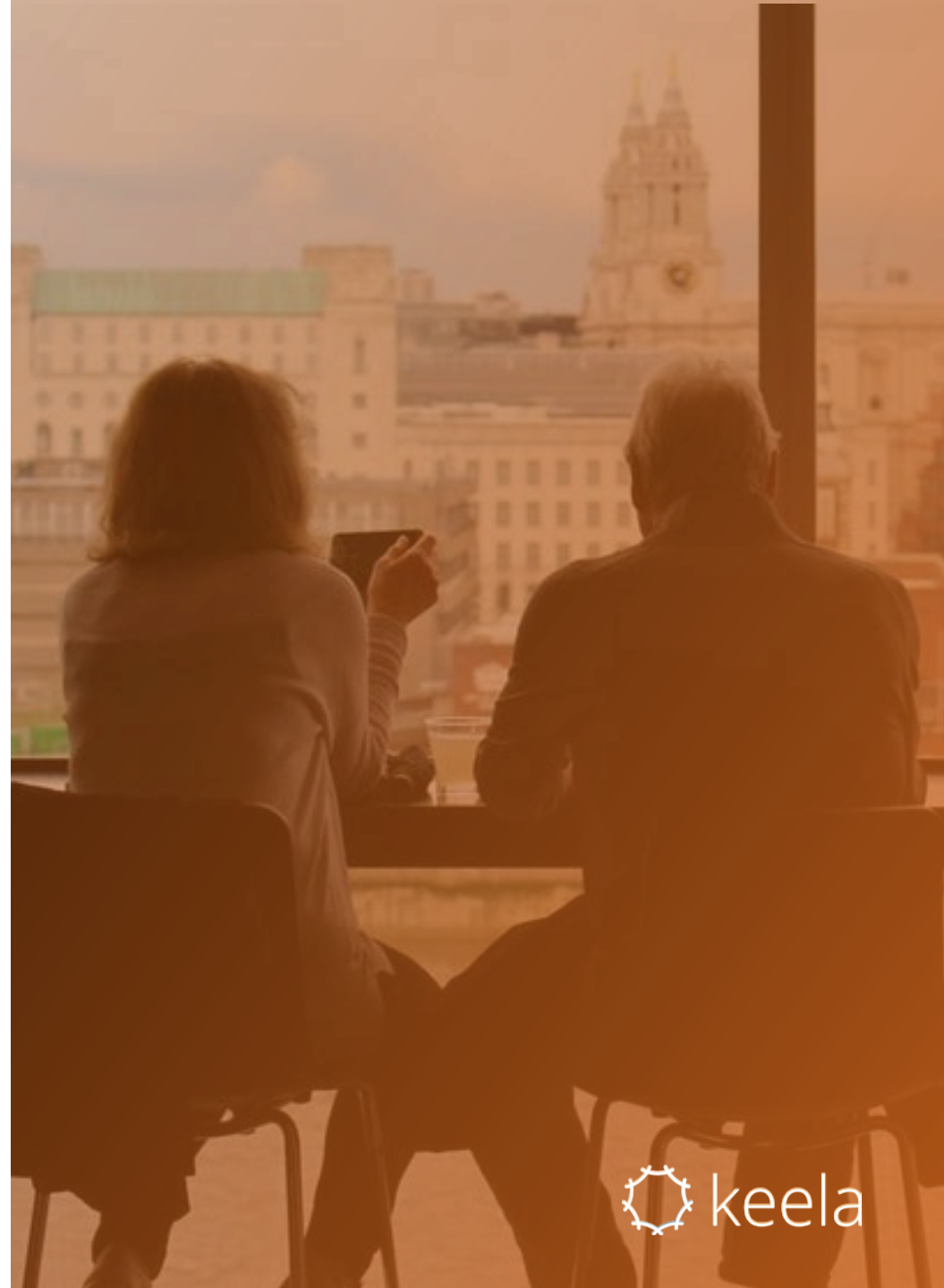
- Create Tags (or groups) based on the different volunteer programs you have

# 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

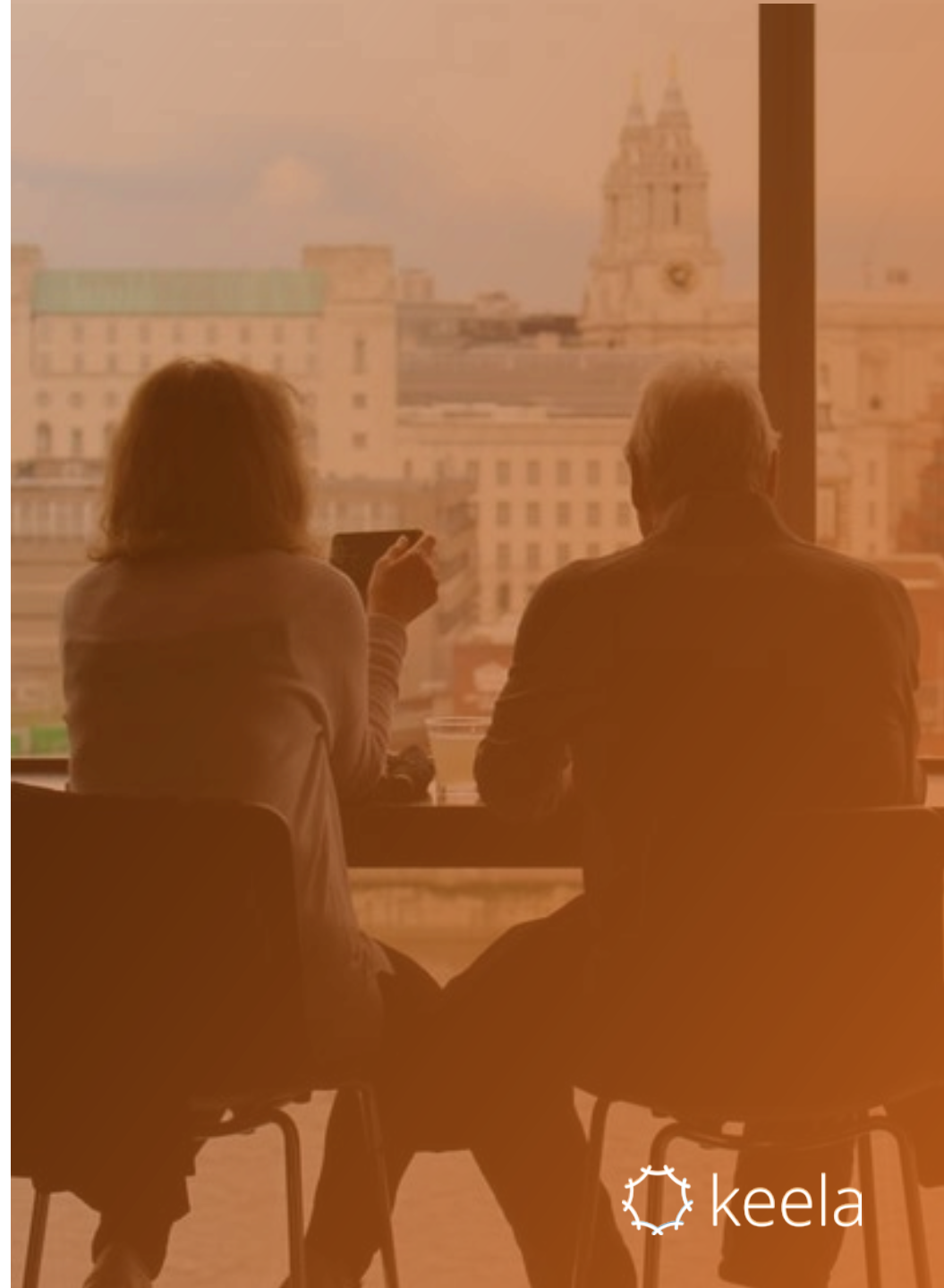


# Retaining Volunteers

As a recap, we learned that:



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- You should set concrete goals
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# Retaining Volunteers

## Setting Goals

The screenshot displays the Keela dashboard interface. On the left is a dark sidebar with navigation links: Dashboard, Analytics BETA (with sub-links 'Add smart list' and 'Learn more'), Contacts (with sub-links 'Engaged donors', 'ABC University', and 'Major Donors'), Campaigns (with sub-links 'Add campaign' and 'Learn more'), Projects (with sub-links 'Add project' and 'Learn more'), and Events (with sub-links 'Import event' and 'Learn more'). The top header includes a search bar, a 'Dashboard' breadcrumb, and user information for 'Grandview Heigh...'. The main content area is divided into four colored panels: CAMPAIGNS (orange) showing 'Most recent e-blast: Email Errors' with a circular progress indicator; DONATIONS (pink) showing a donut chart and text 'This Month : GBP \$24,786.69 donated | 495.73% of target' and 'This Fiscal Year : GBP \$453,158.14 donated | 453.16% of target'; TASKS (blue) titled 'Collaborate' with the text 'Track tasks and get more done.' and an 'Add a project' button; and FOLLOWUPS (green) titled 'Keep the conversation going' with the text 'No followups found with current filters. Click ⚙️ to change filters.' and an 'Add a contact' button. The Keela logo is in the bottom right corner.

keela

All Search...

Dashboard

Dashboard

CAMPAIGNS

Most recent e-blast:  
Email Errors

DONATIONS

This Month : GBP \$24,786.69 donated | 495.73% of target  
This Fiscal Year : GBP \$453,158.14 donated | 453.16% of target

TASKS

Collaborate

Track tasks and get more done.

Add a project

FOLLOWUPS

Keep the conversation going


No followups found with current filters.  
Click ⚙️ to change filters.

Add a contact

keela

# Retaining Volunteers

Staying organized

keela

Dashboard

Analytics BETA

+ Add smart list

📘 Learn more

Contacts

Engaged donors

ABC University

Major Donors

Campaigns

+ Add campaign

📘 Learn more

Projects

+ Add project

📘 Learn more

Events


+ Import event



📘 Learn more

AllPhilip

🔍


+📧🔔

Grandview Heigh...

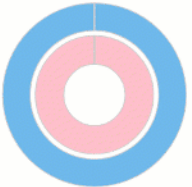


CAMPAIGNS

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# Retaining Volunteers

## Recognizing volunteers

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keela

All Philip

Dashboard

Analytics BETA

- Add smart list
- Learn more

Contacts

- Engaged donors
- ABC University
- Major Donors

Campaigns

- Add campaign
- Learn more

Projects

- Add project
- Learn more

Events

- Import event
- Learn more

Dashboard

Dashboard

CAMPAIGNS

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TASKS

Collaborate

Track tasks and get more done.

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Keep the conversation going

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# CRMs help volunteer managers

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



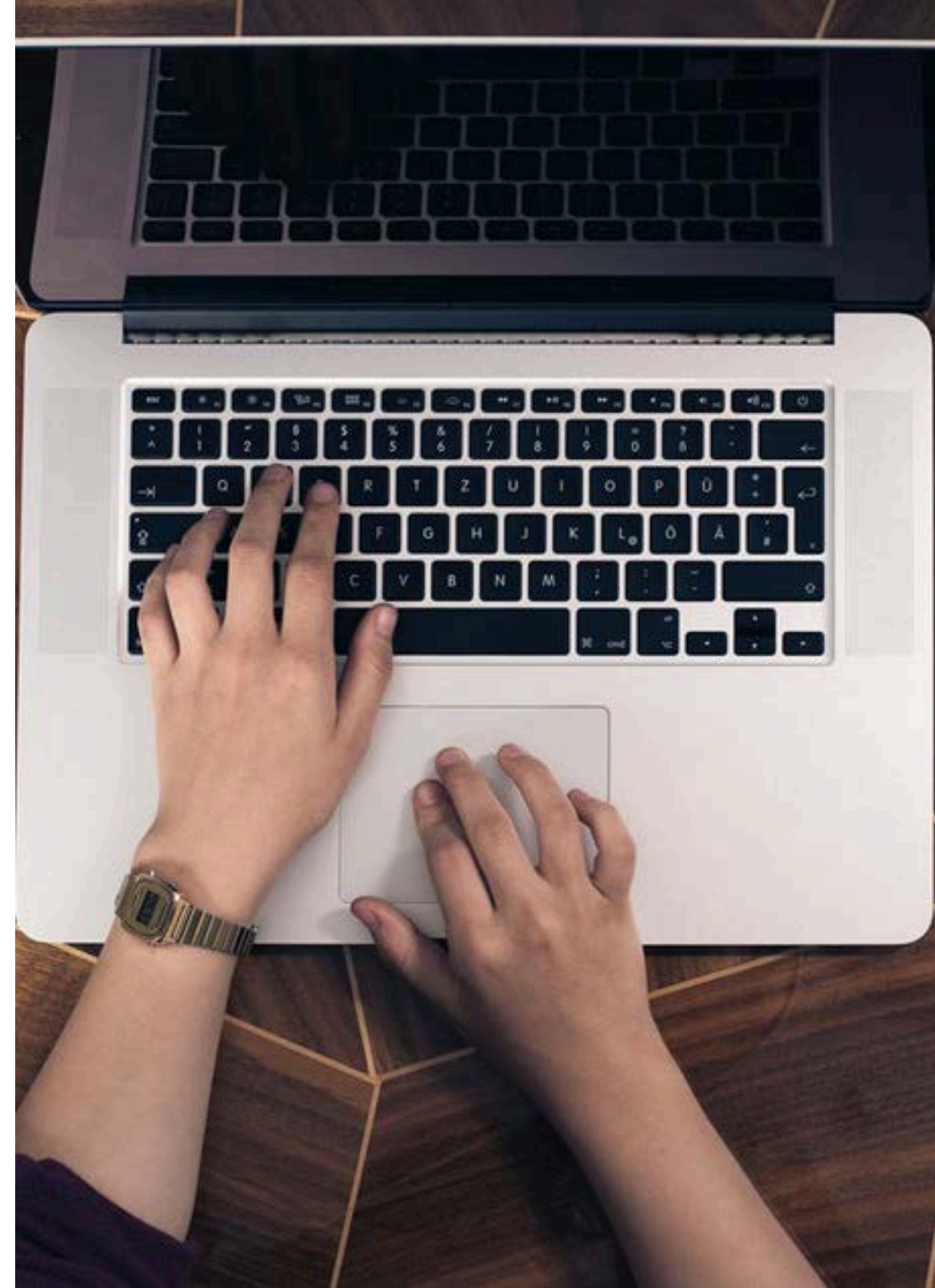
**Recruit the best volunteers.**



**Retain the best volunteers.**



**Work more efficiently.**





Thank **you!**

The background of the slide is a warm, orange-toned photograph. It depicts a group of people's hands raised in the air, with some hands specifically arranged to form a heart shape in the center. The lighting is soft and diffused, creating a sense of community and positivity.

**Let's chat!**  
[philip.manzano@networksforchange.org](mailto:philip.manzano@networksforchange.org)





Empowering small nonprofits to  
make a **BIG impact.**

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