



WELCOME TO

CONVERGE | 21

powered by **PURSUANT**



TRENT RICKER
CEO
Pursuant

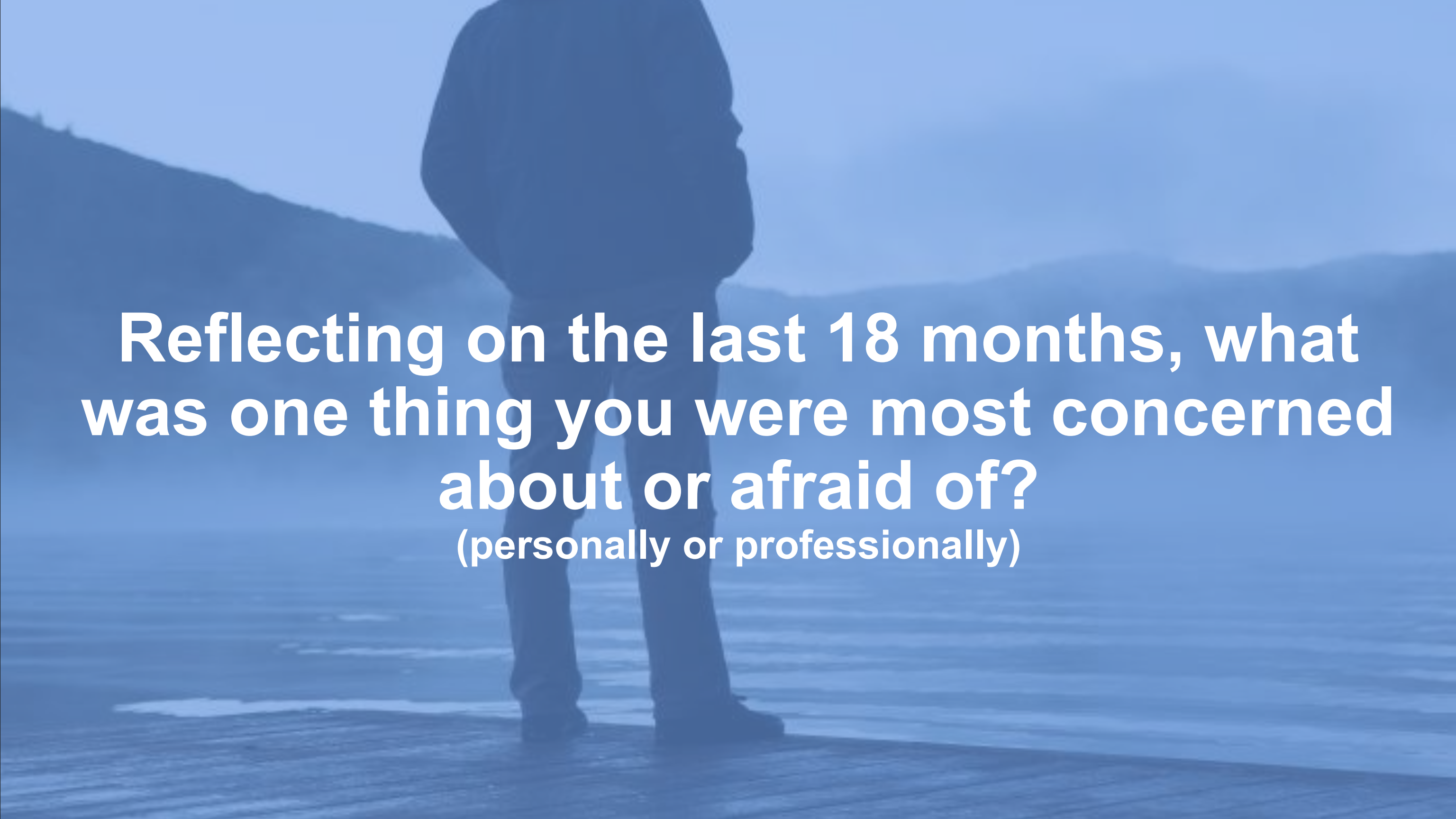
WELCOME

Agenda Day 1


THEME: COMMUNITY +
EXPERIENCE

- 01** WELCOME + KICK OFF
- 02** EXPLORING COMMUNITY
- 03** STATE OF PHILANTHROPY
- 04** DISCUSSION: PYRAMID VS. VORTEX
- 05** **RESPONSIVE FUNDRAISING:** Building Deep Donor Relationships with Multi-Channel Strategies
- 06** **TALENT 2021:** Navigating Winds and Waves Forward

BREAK OUT THE CARDS

A blue-tinted photograph of a person standing on a beach, looking out at the ocean. The person is in silhouette, wearing a long-sleeved shirt and pants. The background shows the ocean waves and a hazy horizon. The text is overlaid in white, bold, sans-serif font.

**Reflecting on the last 18 months, what
was one thing you were most concerned
about or afraid of?**
(personally or professionally)



**What is one thing you accomplished
or navigated in the last 18 months that
you're in awe of upon reflection?**
(personally or professionally)

A group of people are gathered around a campfire in a forest at night. The fire is bright and glowing, illuminating the scene. The people are silhouetted against the light of the fire. The background is filled with tall, dark trees. The overall atmosphere is warm and intimate.

**What does community
mean to you?**
(personally and professionally)

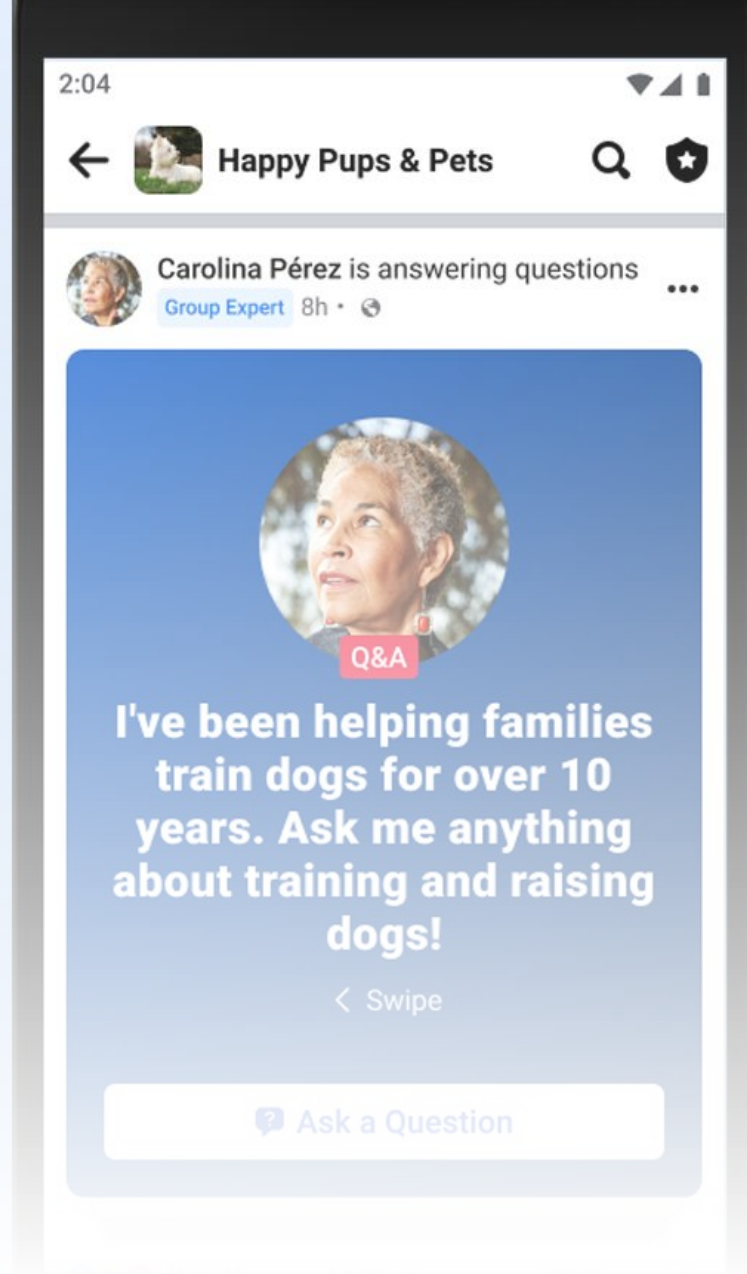
2019



2020



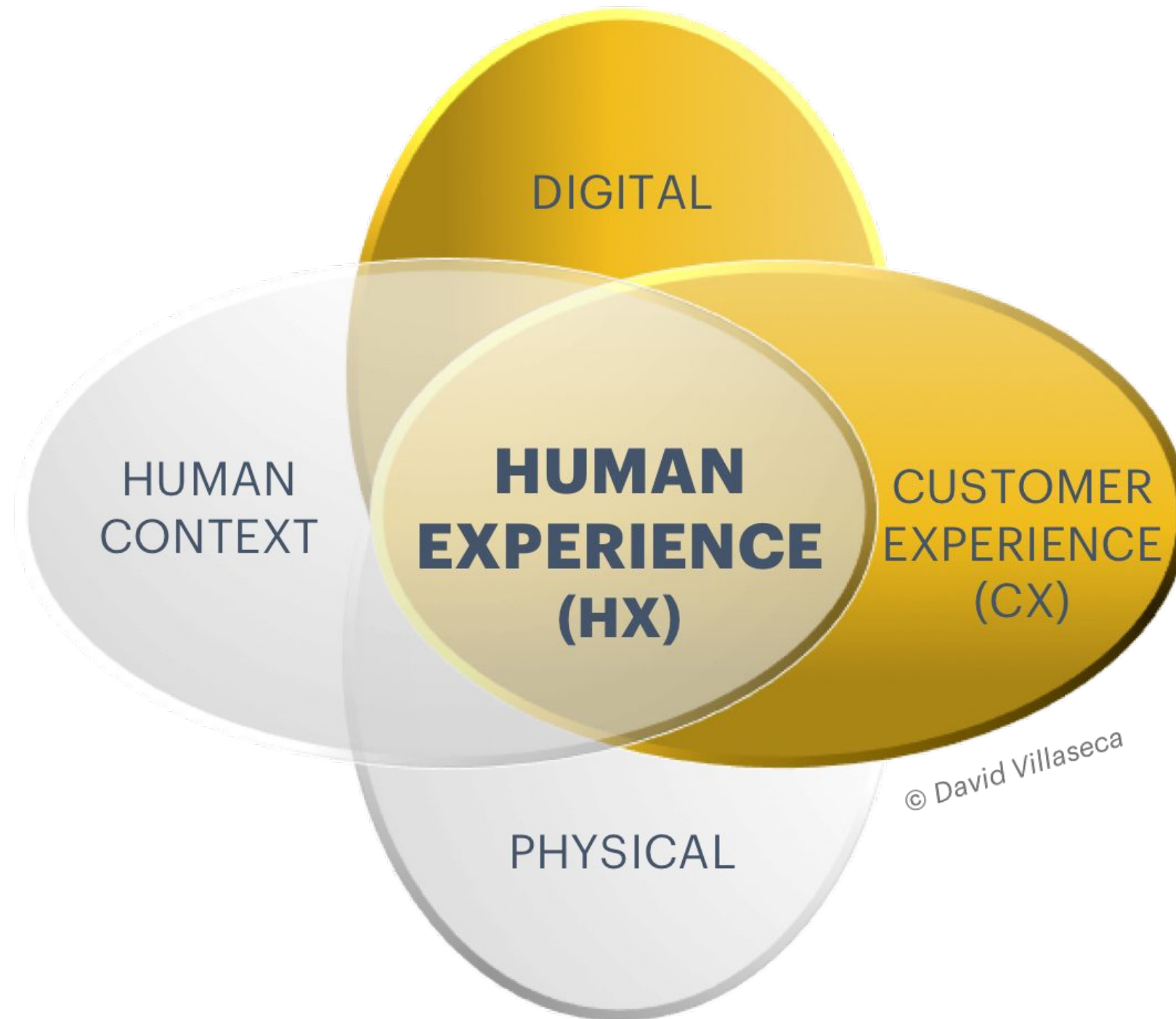
2021



Community's Evolution

A woman with long brown hair, wearing a blue and white checkered blazer, is seated at a large wooden table in a modern office or co-working space. She is looking at a laptop screen and has her hands on the keyboard. The background shows other tables, chairs, and a whiteboard with diagrams. The entire image has a blue tint.

The Evolution of Community



© David Villaseca



Human Experience

Community

Loyalty

A person stands on a wooden pier extending into a calm blue ocean under a clear sky. They are holding a large, white rectangular board. On the board is a recursive image of the same person holding the board, creating a series of diminishing reflections. The person is wearing a dark hat and dark pants. The text 'Echo Chambers' is overlaid in a bold, purple font across the center of the image.

Echo Chambers

A person is standing in the center of a city street, their legs and feet visible. They are wearing dark pants and dark shoes. The background is a blurred city street with buildings, cars, and streetlights, creating a bokeh effect. The overall tone is slightly desaturated and artistic.

**Where do we go
from here?**



Matthew Mielcarek

SVP, Analytics & Insights
Pursuant



Jennifer Bielat

EVP, Client Strategy
Pursuant



STATE OF **PHILANTHROPY**

Giving Outlook | Jennifer Bielat
Matthew Mielcarek



WHAT WE'LL DISCUSS

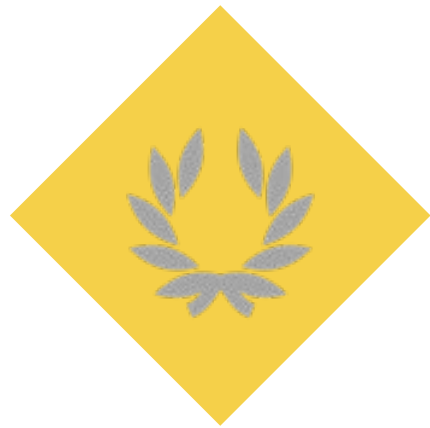
- Current philanthropic conditions
- Understanding performance
- A new model for engagement
- Thoughts forward

LOOKING BACK & ASSESSING WHERE WE ARE TODAY

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2020 THE HIGHEST YEAR OF CHARITABLE GIVING ON RECORD



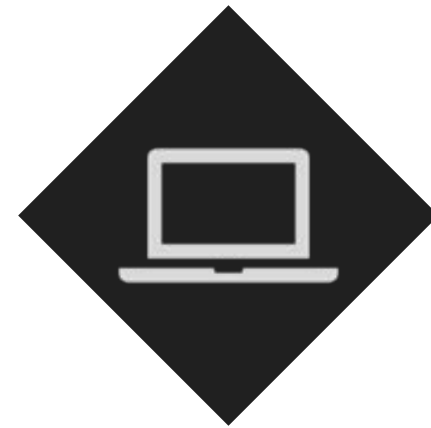
PHILANTHROPIC GIVING

Highest performance on record. Overall **increase of 5.1%** over previous year.



CATEGORY GIVING

Foundation giving grew by 17.0% while Corporations fell 6.1%. **Individual giving grew by 2.2%.**



CHANNEL GIVING

Overall online revenue **increased by 32%** in – 3X the rate of typical, annual growth.

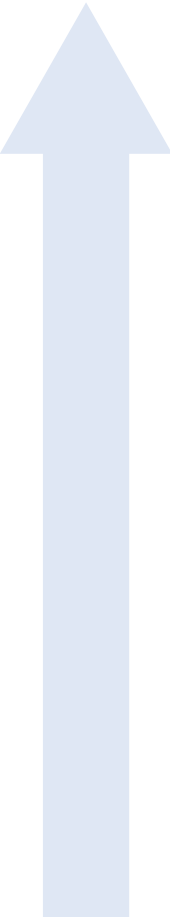


PROJECTED GROWTH

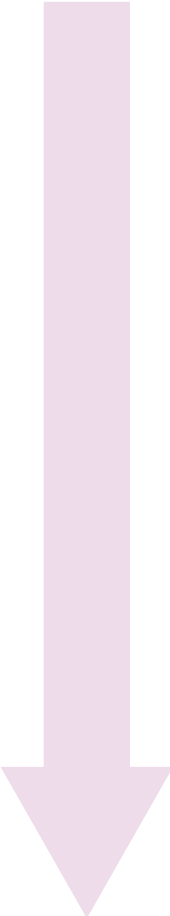
2021 and 2022 total giving expected to be **higher than 40-year historic averages.**

SECTOR HIGHLIGHTS

2020 PERFORMANCE HIGHLY RELATED TO
PROXIMITY TO COVID-19 NEED + RESPONSE

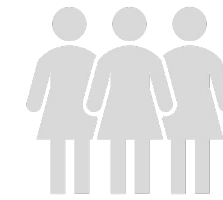


- Public Society Benefit
UP 15.7%
- Human Services
UP 9.7%
- International Affairs
UP 9.1%
- Education
UP 9.0%
- Religion
UP 1.0%



- Health
DOWN 3.0%
- Arts, Culture, Humanities
DOWN 7.5%

ACTIVE DONORS AT RECORD HIGH
UNIVERSE OF DONORS GIVING



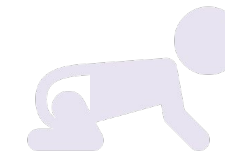
CURRENTLY

Active Donors up 10% from
Q1 2020, at the the
highest level recorded

LONG VIEW

Universe of donors on a
decade-long downward trend
– with frequent surges

LOW DOLLAR DONORS
DRIVE **NEW DONOR** SURGE
FIRST TIME DONORS TO AN ORGANIZATION



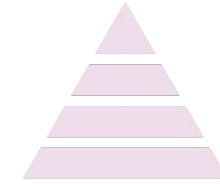
CURRENTLY

New Donors up 24% since
Q1 2020. Most growth from
low-dollar, giving less than \$100

LONG VIEW

More volatile than active donors with
both greater dips and peaks

MID TO MAJOR REVENUE IS MUTED
DONORS GIVING MORE THAN \$500



CURRENTLY

**Mid to major-level donor
revenue down between
3% and 8% for from Q1 2020**

LONG VIEW

Revenue per donor
consistently increasing
over time

DONATION FREQUENCY IS INCREASING
COUNT OF DONOR'S YTD DONATIONS



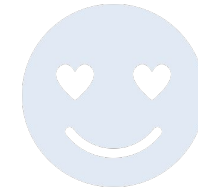
CURRENTLY

**Donors giving two to six donations
within a single year increased more
than 10% from Q1 2020**

LONG VIEW

**Overall donations typically
a mix between first-time
and repeat donors**

DONOR RETENTION IS RECOVERING
DONORS WHO GAVE LAST YEAR AND AGAIN THIS YEAR



CURRENTLY

Donor retention is up
6.9% over Q1 2020

LONG VIEW

Weak industry-wide, particularly for
new donors. Took a major
hit going in 2020.

ECONOMIC SIGNALS
ESTIMATING 2021 PERFORMANCE

GDP

to grow more than 6% –
4 percentage points
higher than pre-pandemic
levels

JOBS MARKET

has slowed after gains yet the
“great resignation” underway

**INFLATION
FEARS**

prices are 5.4% higher
than last year while wages
are rising

Trillion-dollar
**INFRASTRUCTURE
AGREEMENT**

remains under negotiation

COVID

resurgence continuing

**CONSUMER
SPENDING**
likely to increase 7%

**UNEVEN
RECOVERY**

across sectors,
income levels, world

TODAY
2021 PERFORMANCE

Donor and revenue growth continues
after a year of widespread growth...
but at a moderated pace

4.1% growth forecast in 2021

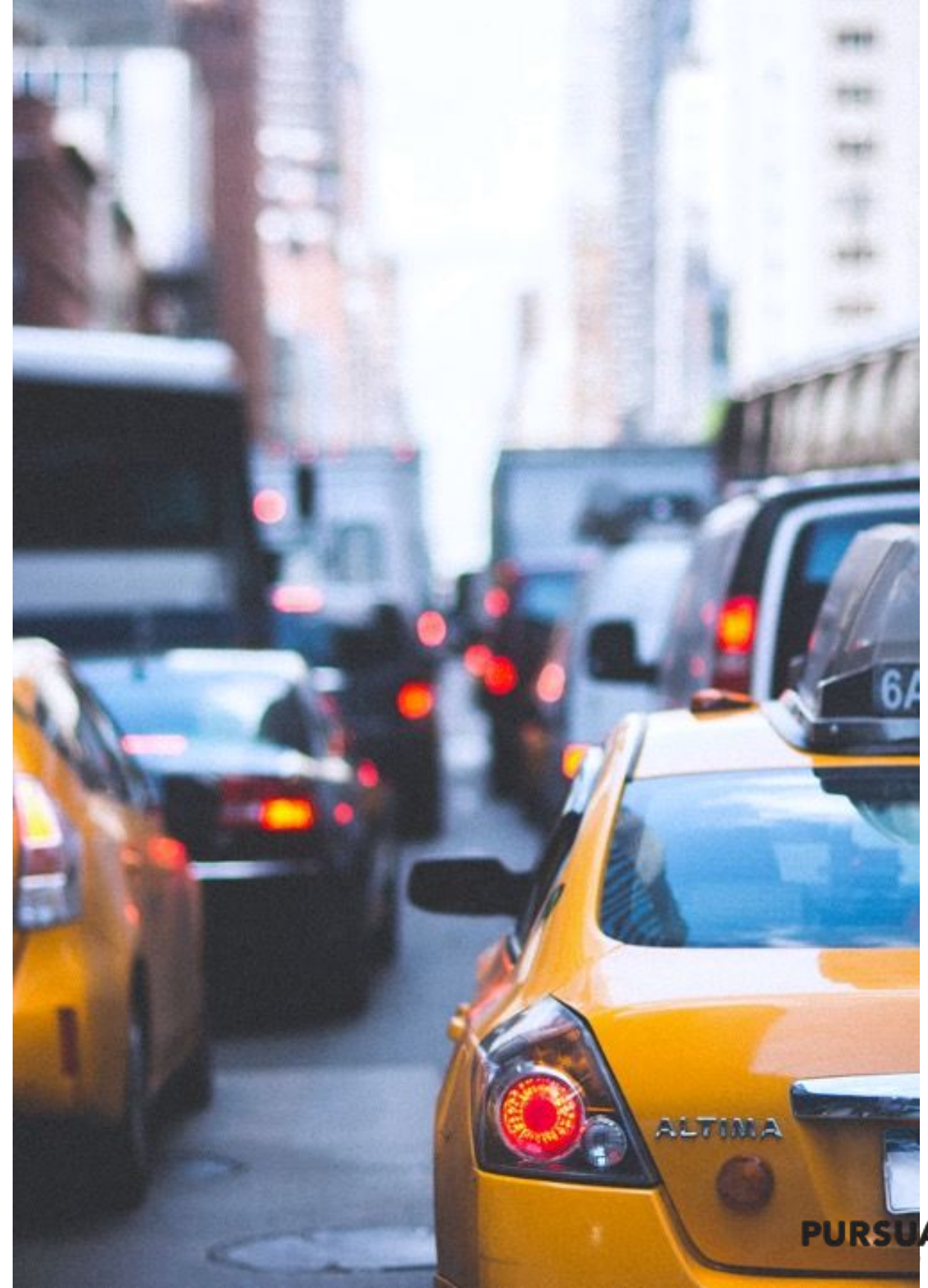
by Lilly Family School of Philanthropy, higher than historic
10-year, 25-year, and 40-year rates of growth

FINDING SIGNAL IN THE NOISE

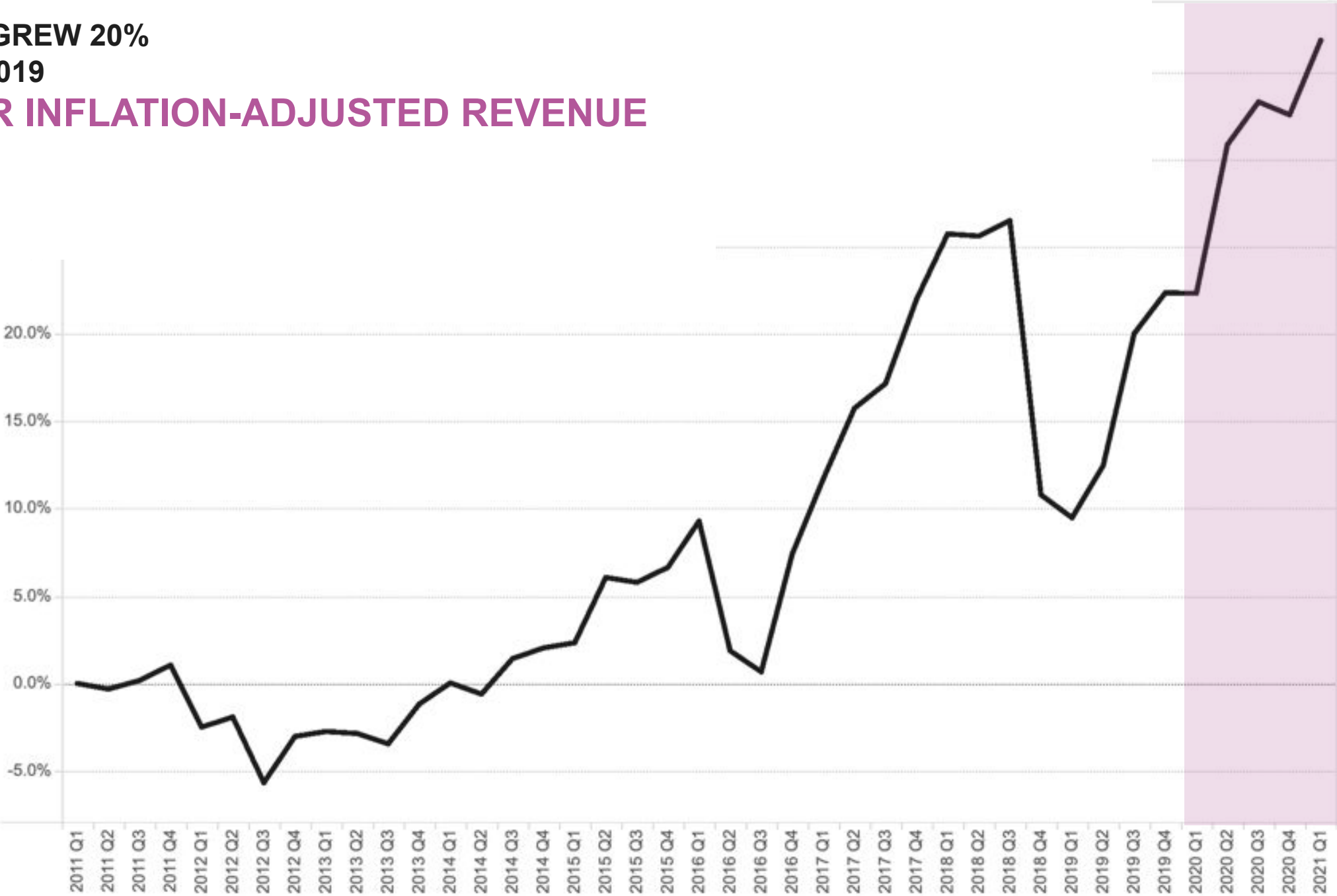
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Does philanthropy
remain disrupted or
are we on a new
trendline?



**REVENUE GREW 20%
THROUGH 2019**
TEN YEAR INFLATION-ADJUSTED REVENUE



donorCentrics Index of Direct Marketing Fundraising / Copyright 2021 Target Analytics, a division of Blackbaud

**YET DONORS DECLINED 2%
THROUGH 2019**
TEN YEAR DONOR GROWTH




donorCentrics Index of Direct Marketing Fundraising / Copyright 2021 Target Analytics, a division of Blackbaud

The pandemic
destabilized many
nonprofits' ability
to engage


Consumers have
now combined
pre-pandemic
preferences with
new skills they
acquired

Philanthropy is
undergoing
fundamental change



A silhouette of a person stands with their back to the camera, looking out at a sunset over a body of water. The sun is a bright, glowing orb on the horizon, casting a warm orange and yellow light across the sky and water. Several small, semi-transparent squares in light blue, purple, and dark blue are scattered in the air, appearing to float or drift. The overall mood is contemplative and serene.

OUR POWERS OF ATTRACTION & ENGAGEMENT HAVE CHANGED

A silhouette of a person stands with their back to the camera, looking out over a body of water at sunset. The sun is low on the horizon, creating a warm, golden glow. Several small, semi-transparent squares in light blue, dark blue, and purple are floating in the air around the person. The text is overlaid in the center of the image.

OUR POWERS OF ATTRACTION & ENGAGEMENT HAVE CHANGED

*** LONG BEFORE THE PANDEMIC HIT**

A NEW MODEL FOR ENGAGEMENT AND CULTIVATION

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Donor pyramid is archaic.

- Extremely linear
- Pinnacle defined as major/planned gifts
- Foundation is flawed when only 20% progress
- Focused on dollars
- **Pyramid assumes that value is only derived from progression to a higher level**



Vortex is the new model for donor engagement and cultivation.

- Donors enter at various points of the circle – instead of moving up or down –
- Points of energy instead of stages – energy builds at the center where long-term donors reside
- Acknowledges complexities of modern donor experience – focusing on donors not dollars

**How connected do you feel
to the ABC mission?**



Very Connected

Very Disconnected

How connected do you feel to the ABC mission?



Very Connected

Very Disconnected

The Very Connected supporter...

- Gives 15% more than *Somewhat Connected* and 400% more than *Disconnected*

How connected do you feel to the ABC mission?

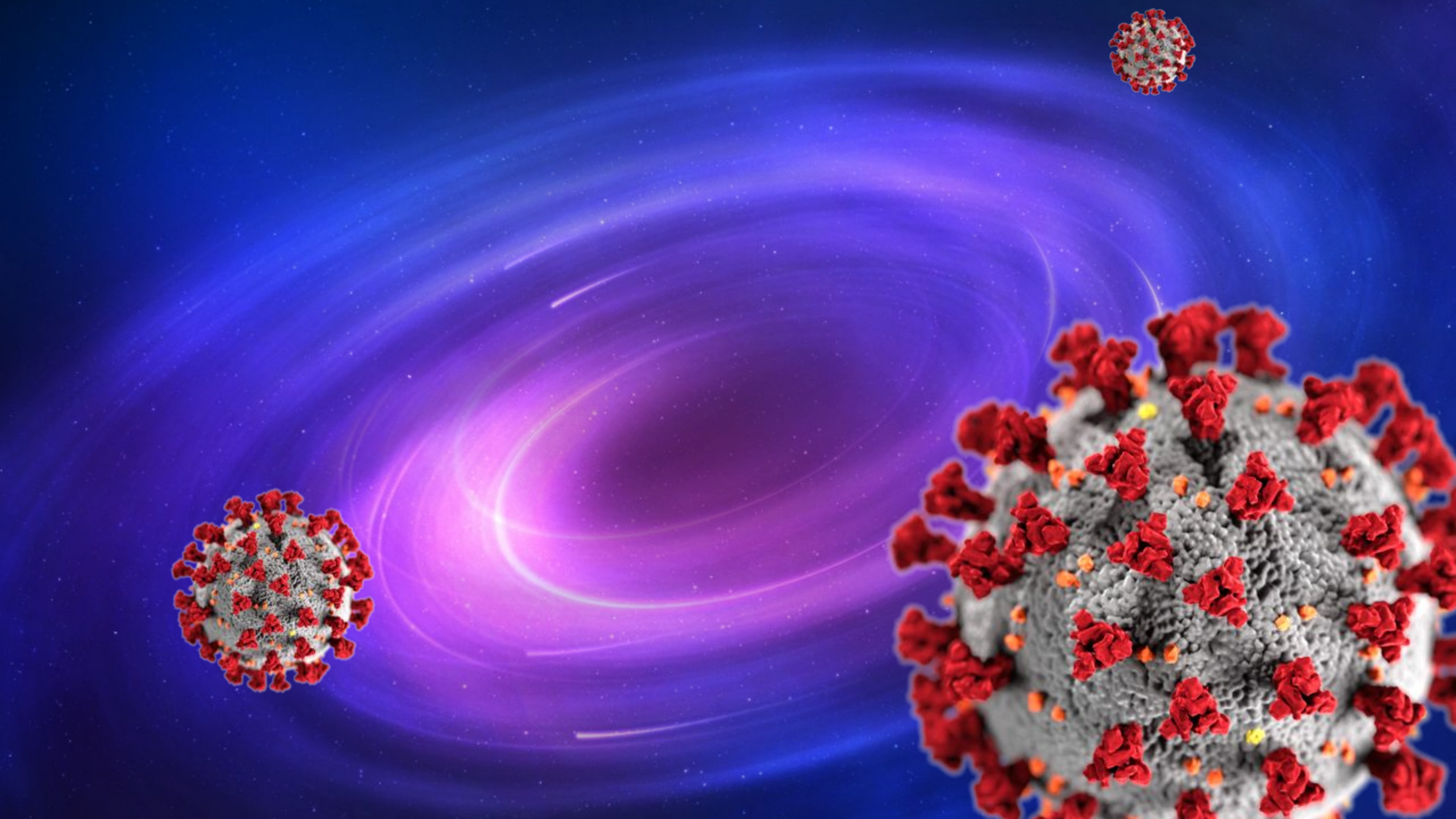


Very Connected

Very Disconnected

The Very Connected supporter...

- Gives 15% more than *Somewhat Connected* and 400% more than *Disconnected*
- Fundraises, Advocates, and Volunteers nearly 2x more than *Disconnected*
- Yet patients can be found at every point in the vortex!



COVID destabilized the vortex!

- Decimated in-person communities
- Invalidated many interaction points created by nonprofits
- Drove most engagement online



A silhouette of a person stands with their back to the camera, looking out over a body of water at sunset. The sun is a bright, glowing orb on the horizon, casting a warm orange and yellow light across the sky and water. Several small, translucent geometric shapes (a blue diamond, a purple square, and a blue square) are floating in the air. The text is centered in a bold, black, sans-serif font.

**IF WE CAN CREATE
COMMUNITY + CONNECTION
WE CAN DRIVE VALUE**



The vortex reminds us that our goal is to spark energy through engagement.

- Fundraisers must create opportunities to interact
- Outbound-only strategies are limited by economies of scale
- Fundraisers must create **community *platforms*** enabling constituents to engage with one-another – sparking energy and interaction



SPARKING ENERGY WITHIN YOUR PROGRAM

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HOW ARE FUNDRAISERS SPARKING ENERGY?



Resetting
Fundraising
Strategies



Taking
Command of
Data



Focusing on
Donor
Experience



Accelerating
Omnichannel



**LET'S CREATE A NEW PATH
AND SPARK ENERGY
TOGETHER**

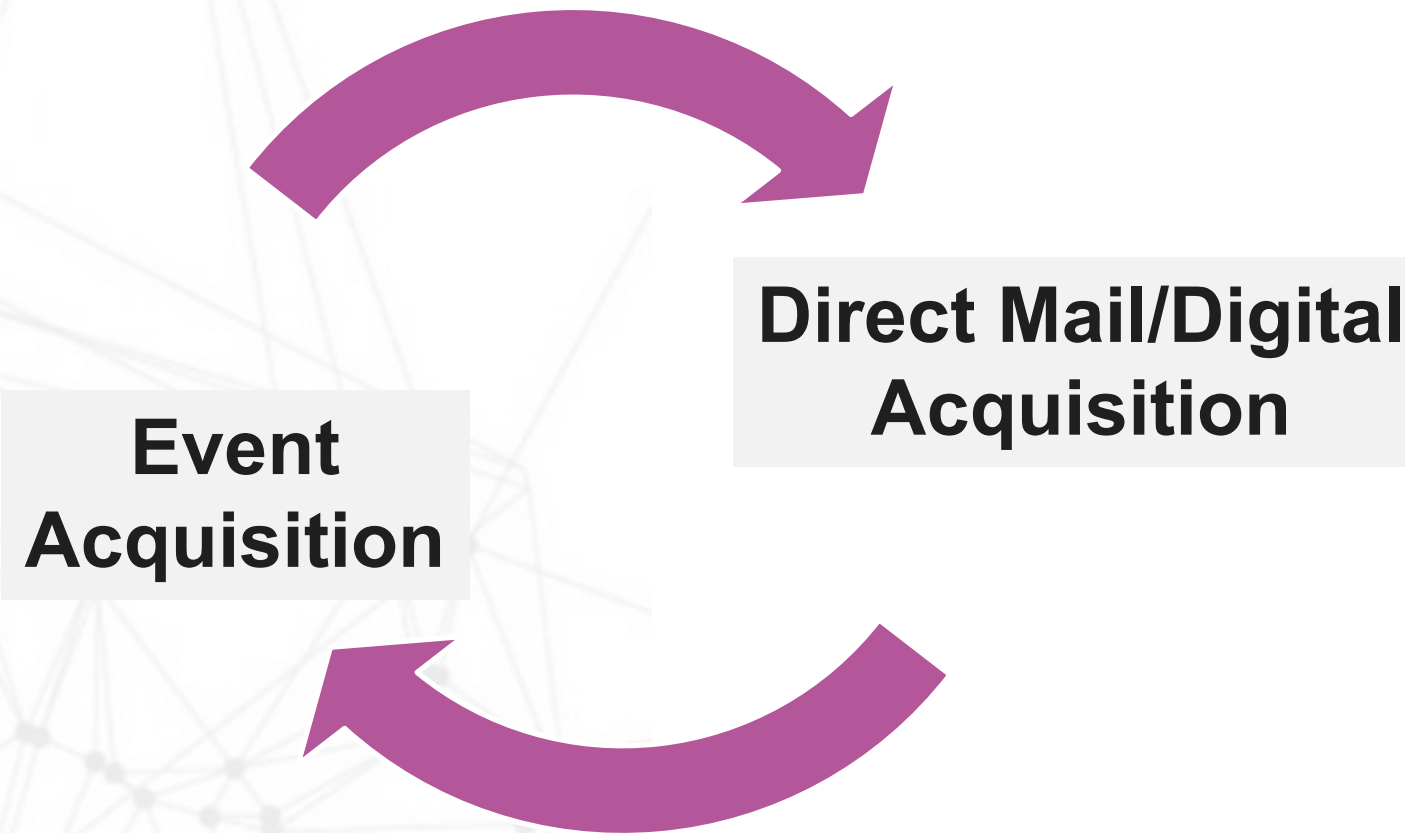


**Thank
You**

RESETTING FUNDRAISING STRATEGIES

REBALANCE INVESTMENTS IN CHANNELS + TEAMS

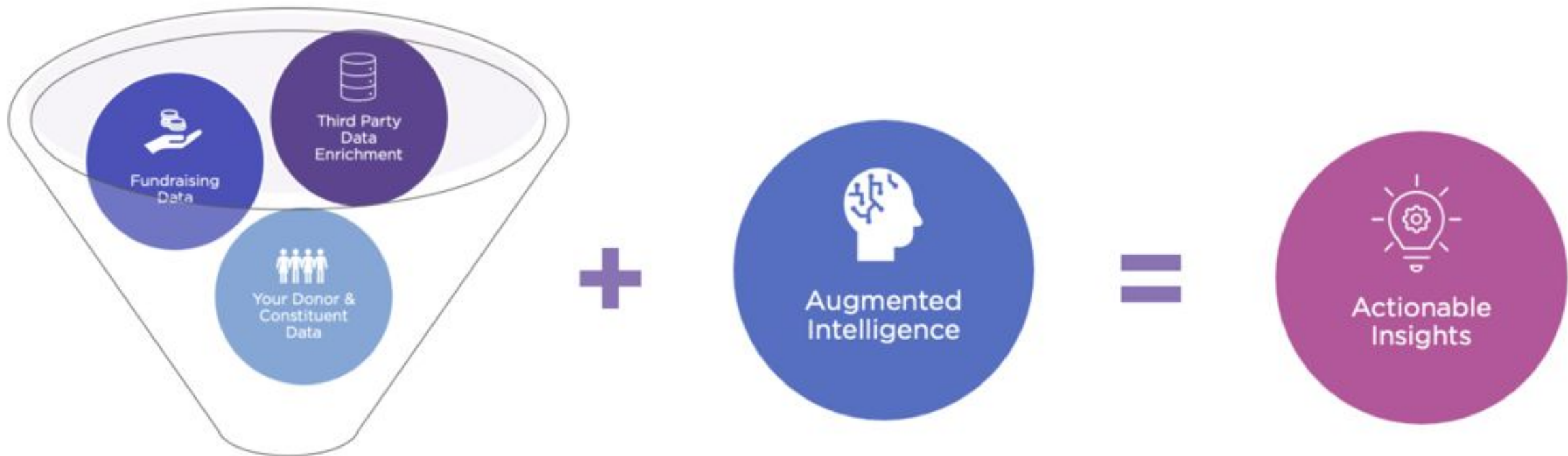
- Fundraisers are revisiting how resources are allocated across their programs
- Acquisition channels have been redirected to direct mail and digital
- Mid-level officers and digital is introduced + returning to development teams



TAKING COMMAND OF DATA

UNLOCK VALUE OF EXISTING DONOR DATA

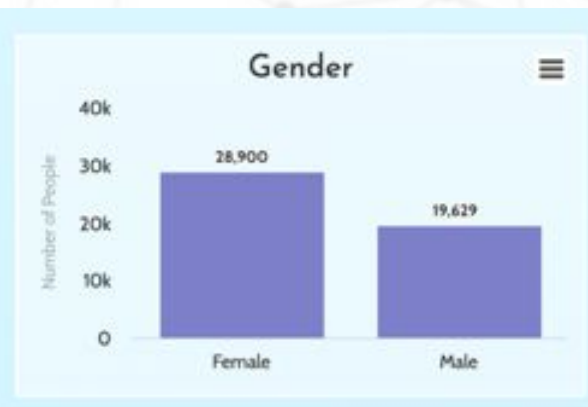
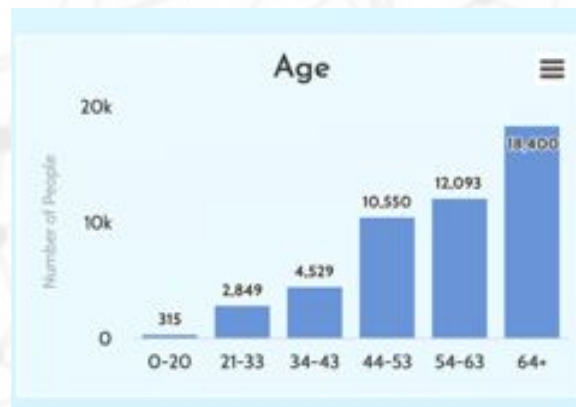
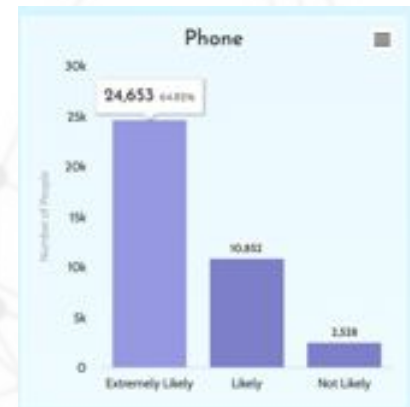
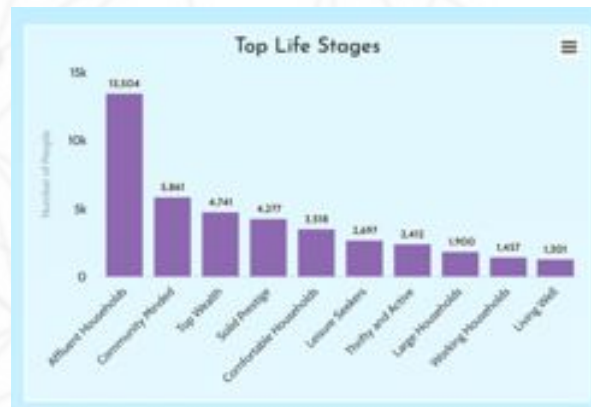
- Fundraisers are prioritizing data capture to maintain control of relationships
- Data enrichment used to provide complete donor profile and insights
- Predictive models used to prioritize donors



FOCUSING ON DONOR EXPERIENCE

DRIVE DONOR RETENTION

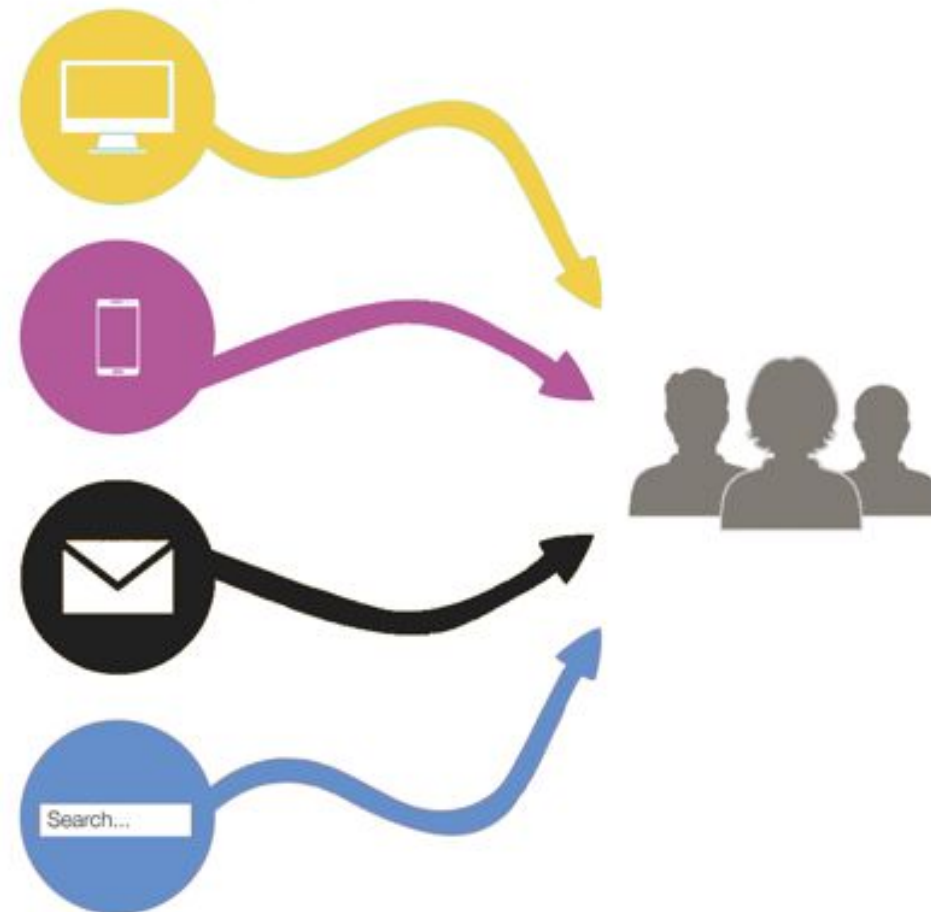
- Fundraisers are driving retention and multi-year relationships by improving donor experience
- Donor audience segmentation yields rich donor file insights on behavior and motivation
- Donor journeys can be prescribed to delight supporters and drive upgrades and repeat gifts



ACCELERATING OMNICHANNEL

VALUE EXPERIENCE OVER ATTRIBUTION

- Fundraisers are building omnichannel experiences for their donors
- Experiences with nonprofits are blurred across all channels – delivering the same message and experience across digital and physical channels
- Direct marketing attribution models are evolving to incorporate engagement efforts



BREAK



PYRAMID VS **VORTEX**

Discussion | Trent Ricker
Jennifer Bielat | Matthew Mielcarek

Does the vortex apply to your organization?

- Does your organizational structure support the Vortex?
What would need to change?
- As an industry we have talked about DonorCentrics; Donor Loyalty; Experience & Journeys, is this just another buzz phrase or are we going to actually change?
- What natural points of energy exist within your organization and what will need to be created to drive the vortex?
- Will you need more staff and resources or could you redeploy resources...reset fundraising strategy?
- And what about data? Have you captured the right data points to drive energetic experiences?

**Thank
You**



Mary Beth McIntyre

Founder & Principal
Win-Win Giving



Jennifer Bielat

EVP, Client Strategy
Pursuant

BREAK




LUNCH



Gabe Cooper

CEO
Virtuous



Responsive Fundraising

Building Deep Donor Relationships with Multi-Channel Strategies

Gabe Cooper | CEO at Virtuous



Our Time Today

The Problem in Fundraising
A More Responsive Approach

Getting in the Weeds
Tactics for Multi-Channel Responsiveness



More than just CRM...

Virtuous is a suite of responsive fundraising solutions that enable nonprofit teams to build better donor relationships and grow impact at scale.



NONPROFIT CRM



MARKETING



AUTOMATION



SIGNALS



GIVING

We're facing a challenge ...

The Generosity Crisis

The numbers

≈50%

Turn over in donors every year

≈25%

Decrease in small donors the last decade

Why donors opt out

Inappropriate asks & impersonal messages

Lacking acknowledgement & transparency



**Giving
USA™**

A public service initiative
of The Giving Institute



IUPUI

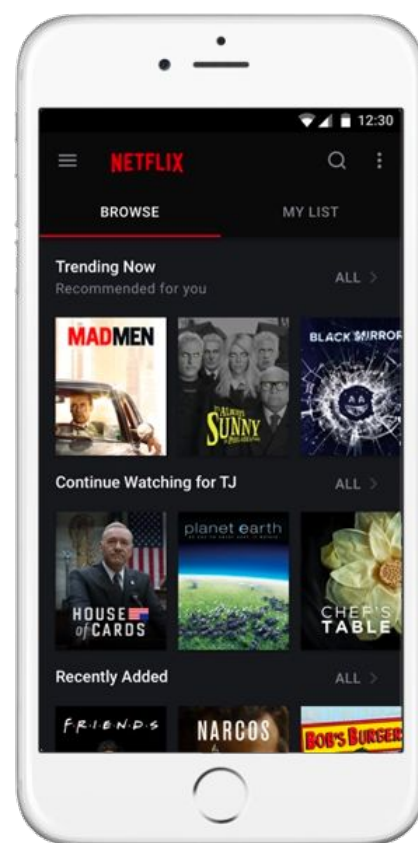
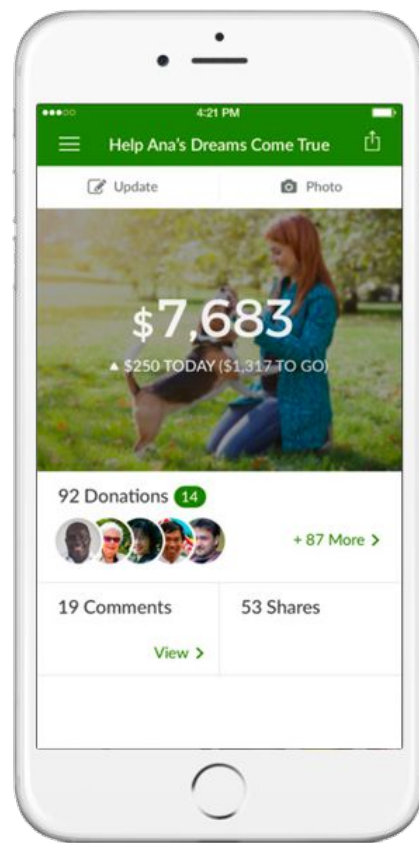
INDIANA UNIVERSITY
Lilly Family School of Philanthropy

Source: Managing Donor
Defection by Adrian Sargeant

Source: The New Nonprofit by
Nicholas Ellinger

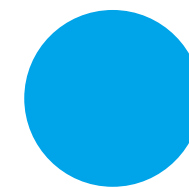
The world you fundraise in has changed.





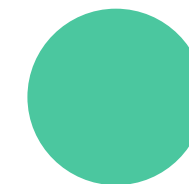
What changed?

Shift from mass marketing to personal experiences.



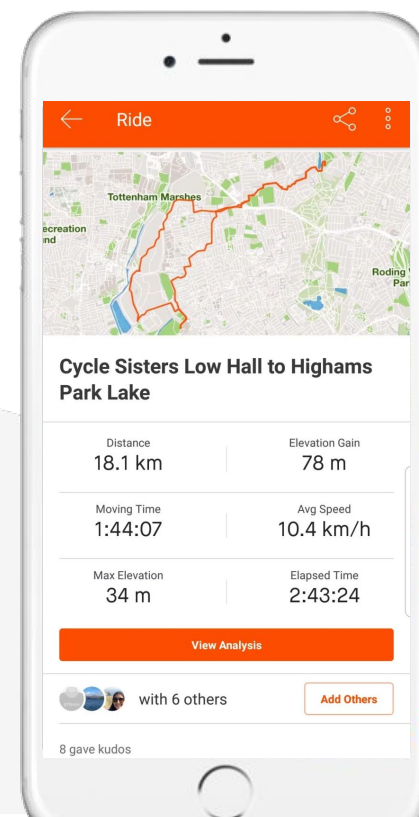
Tailored to you

Curated content and experiences based on your interests.



Two-way, behavior driven

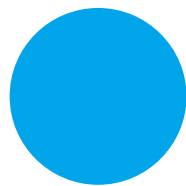
Triggered based on my response to content, data signals, etc.



What changed?



Shift from mass marketing to personal experiences.



Tailored to you

Curated content and experiences based on your interests.



Two-way, behavior driven

Triggered based on my response to content, data signals, etc.

Why donors opt out

Inappropriate asks & impersonal messages

Lacking acknowledgement & transparency

Giving is personal

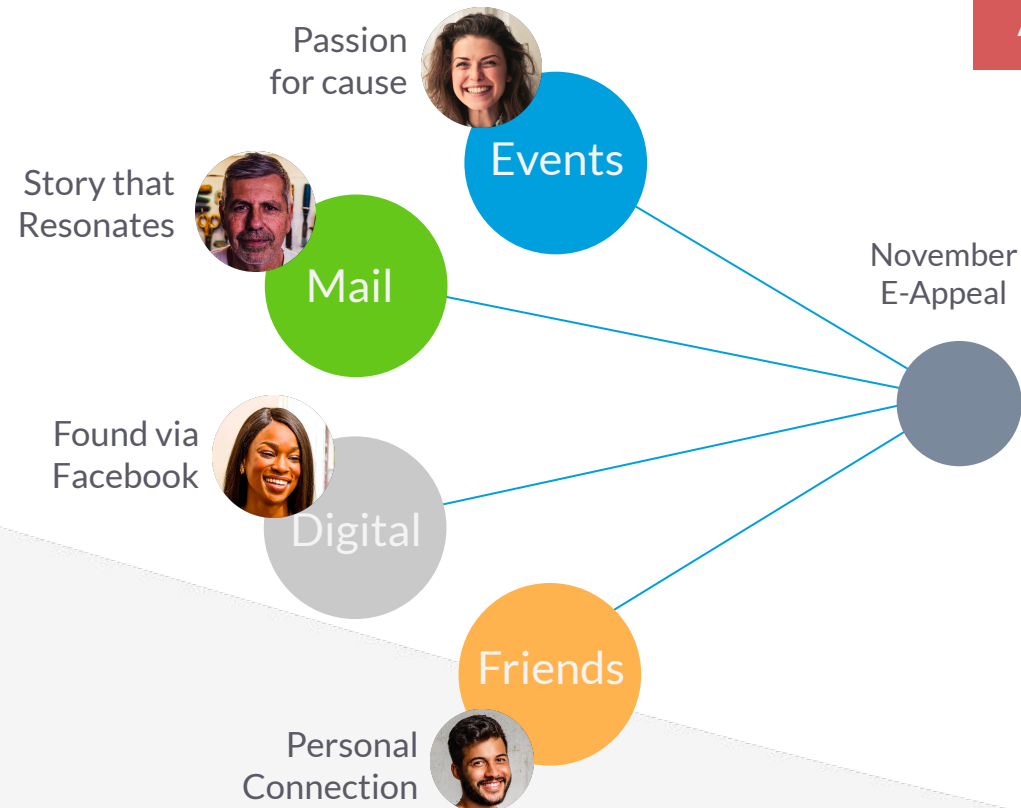
Today's donors expect a personal connection to causes they care about.



Today's fundraising is largely impersonal

Donor/Prospect Acquisition

- Personal and varied
- Based on donor's intent



Retention & Cultivation

- One-to-many ("Spray and Pray"). Impersonal.
- One-way communication. Nonprofit timing.

76%
Attrition

Year-End
Campaign

January
Newsletter

February
Appeal

The Good News...

Many nonprofits are closing the gap

Essentials of Fundraising

Connecting supporters with your story through systems



Responsive Fundraising

Growing nonprofits are using responsive technology and tactics to **connect personally** with each donor.



Imagine for a moment ...

Meet Lisa

Attended a virtual event



1 hr



TY email with a survey on interests

1 day



Thank you call from team

2 days



SMS from Program Team based on interests

Lisa Visits Site



1 day



Email w/ donation ask based on page Lisa visited

Lisa Gives!



15 days



Postcard closing the loop on impact

Connection is based on timing & intent. Multi-channel. Hyper personal.

What if ...



Tim



New Donor Journey

First gift to water campaign



Ronda



Online Gift Recovery

Abandons donation page



Lynn



Lapsed Donor Journey

Hasn't given in 13 months



James



Malaria Info Series

Clicks to email and downloads PDF

KEY INSIGHT

Static vs Dynamic Campaigns

Driven by constituent's timing not the
organization's timing

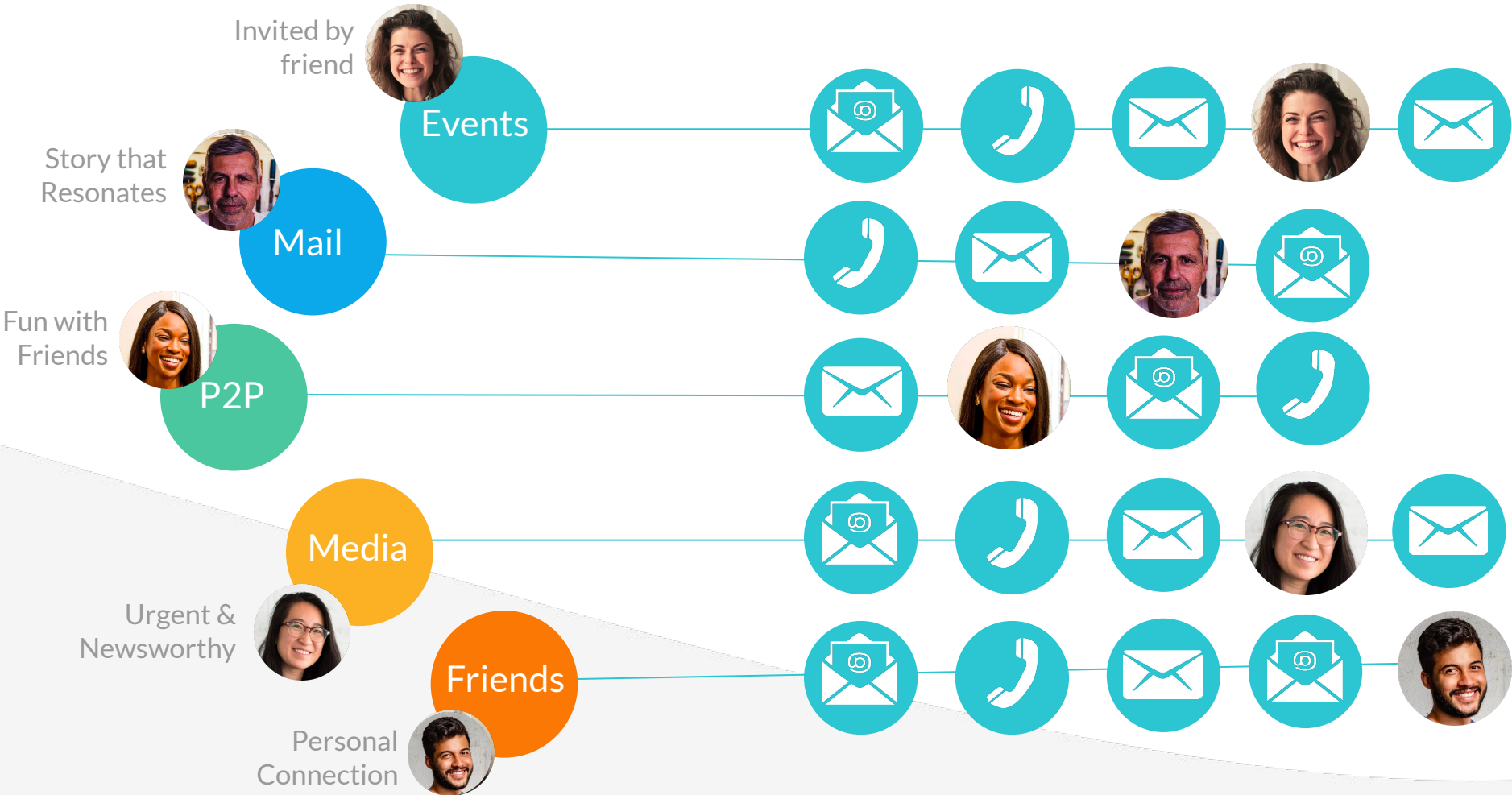
Responsive, dynamic campaigns

Donor/Prospect Acquisition

Personal. Based on Donor Timing

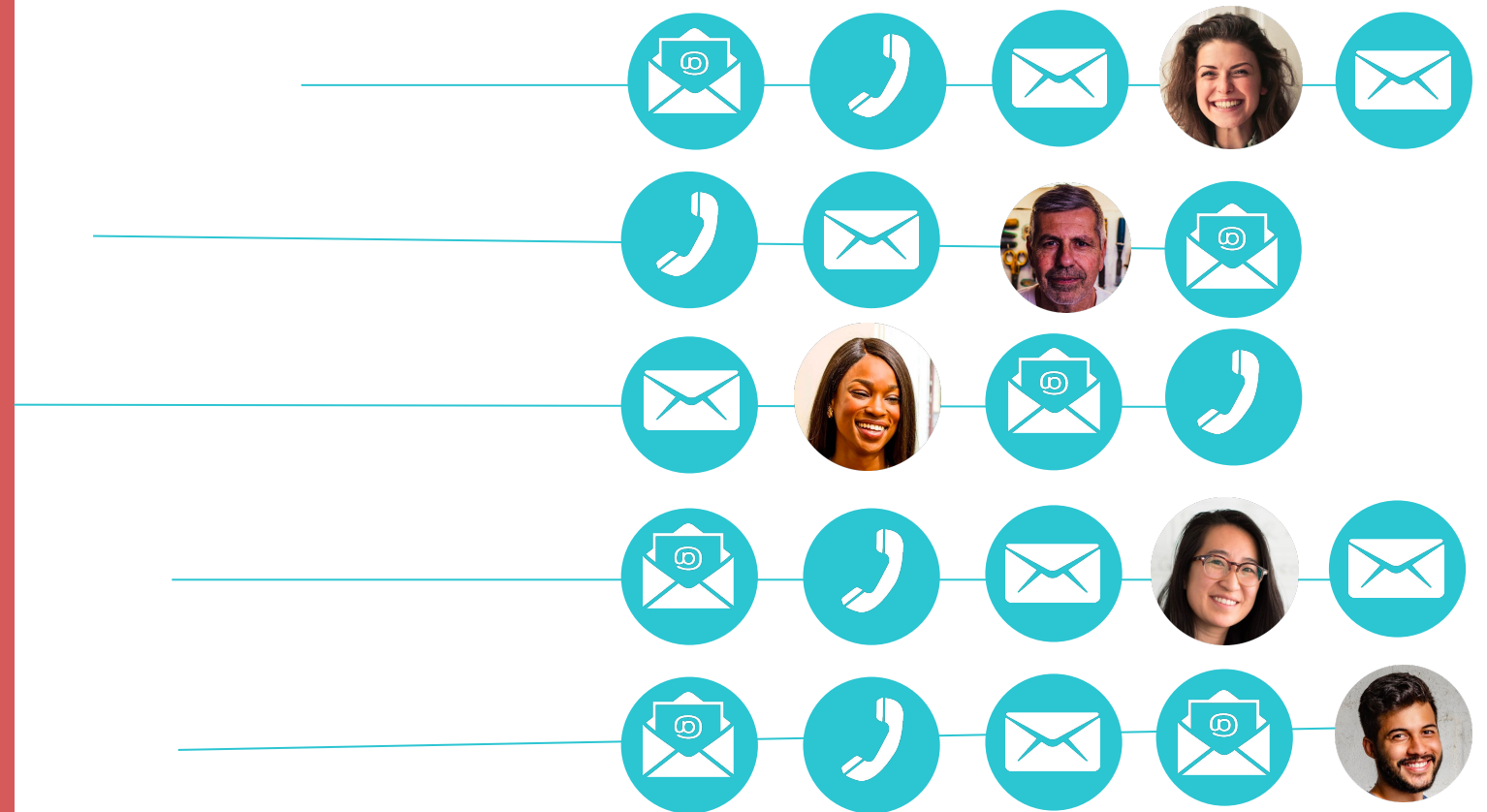
Retention & Cultivation

Connected to Intent. Driven by Donor Behavior.



Multi-Channel. One Conversation.

Growing nonprofits are using multi-channel communications to deepen engagement.

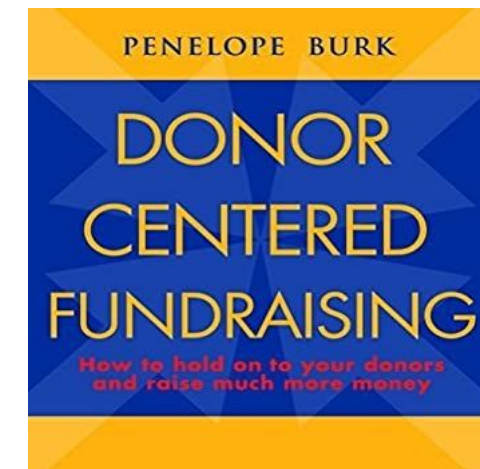
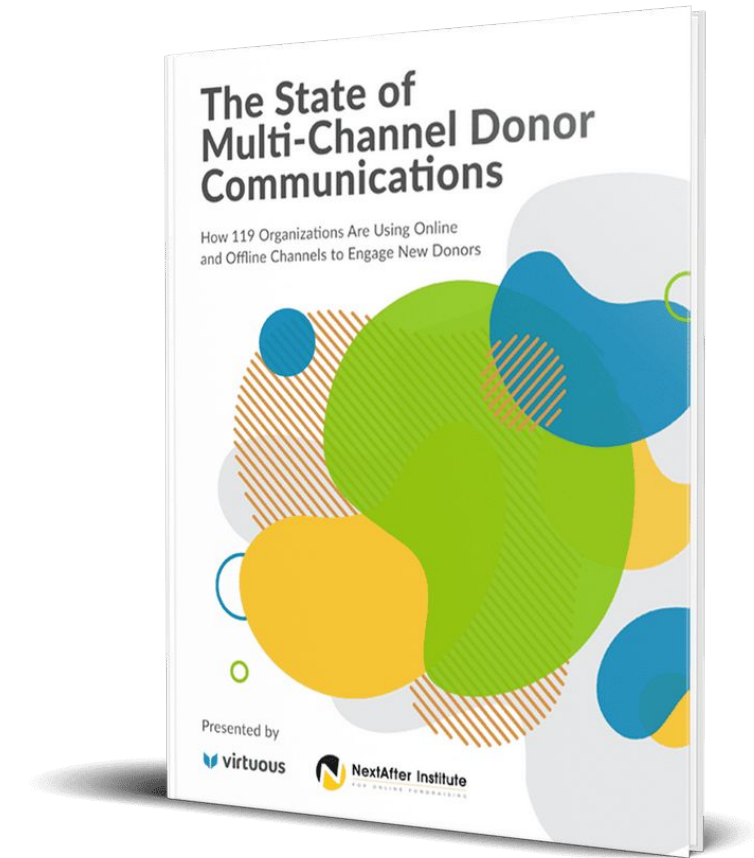


Why Multi-Channel?

Multi-channel donors are worth 300% more (LTV)

Digital donors are 3x more likely to become multi-channel donors

Phone & SMS are key to success.
39% increase in giving due to thank you call



Sources: Penelope Burk's 'Donor Centered Fundraising', Aggregate Virtuous Customer Data, The State of Multi-Channel Communications

How We're Doing...

65%

of nonprofits are not communicating with online and offline donors in multiple channels

Donated **\$20** online to **119** organizations.

Donated **\$20** via mail to **119** organizations.

Captured **12 key data points** in the giving process.

Donation Page. Thank You Page. Ways to Give Page.

Let's get tactical!

What does **personalization** look like?

How can **marketing automation** help?

A Story of Two Donors

Each gave a gift yesterday.



Katie

*But what
happens next?*



Jeremy



STEP 1 Listen to Signals

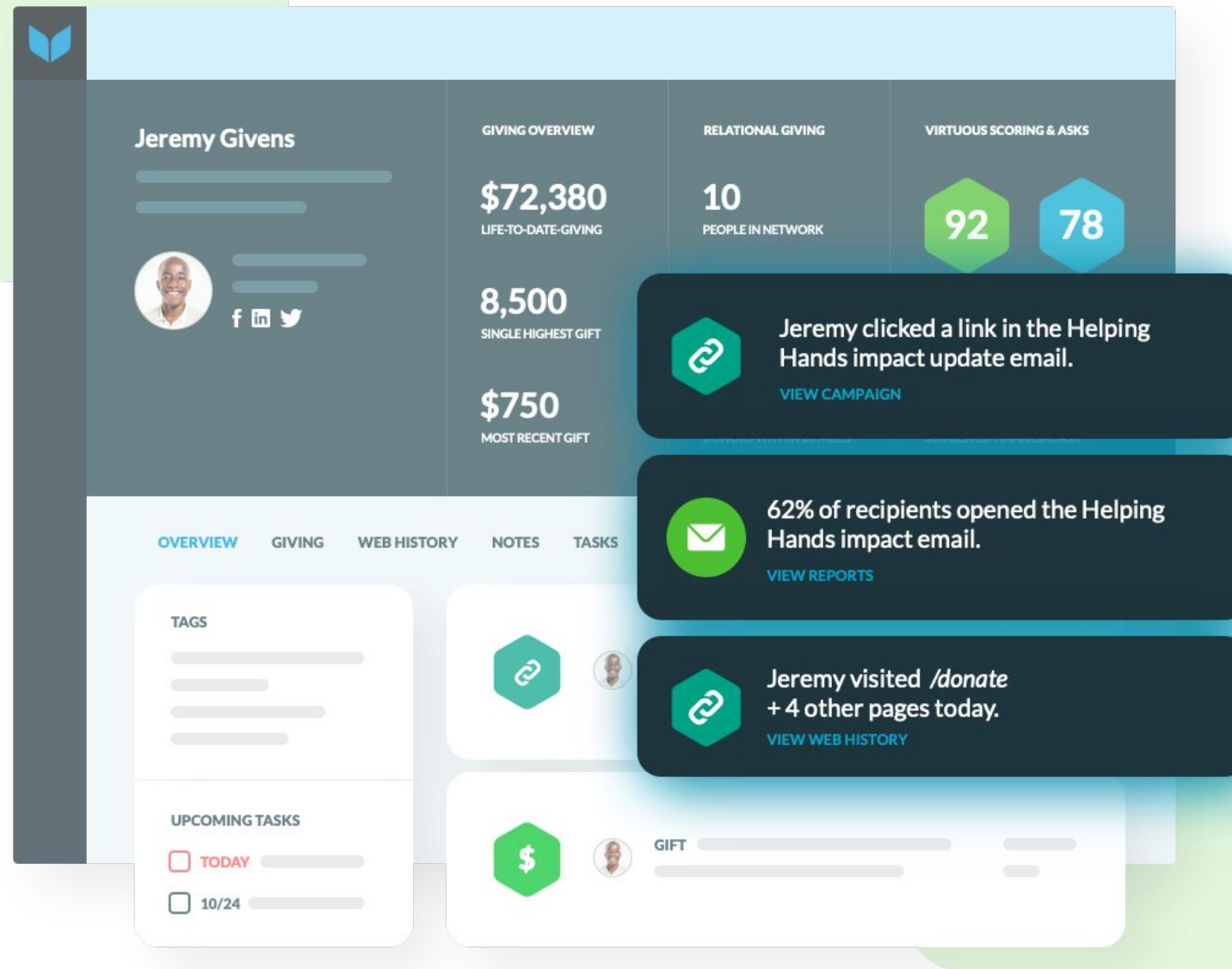
Know your Donor

Donor Profile

- Personal Info
- Giving History
- Engagement
- Channel
- Survey Response

Donor Signals

- Digital Activity
- Wealth Data
- Smart Scoring
- Social Media
- Demographics
- Location



What Are You Listening For?

Involvement

How they engage

Interest

What they engage with

Intent

Why they engage



Active donor ~4 years
LTD Giving > \$5k
Volunteers often

Gives monthly to
women support programs

Volunteered to be a
mentor for young girls

Said in a survey that she
gives because of she saw
first-hand the value of
mentorship.



First-time donor
Attended a virtual event
Gave \$500 online

Requested more info on
child advocacy programs

Viewed child adoption
articles on our website

Visited the website again
after being disengaged for
four (4) months.



RESPONSIVE FUNDRAISING

Segment by Donor Persona



Erika // New Mother



Cheryl // Former Teacher



Scott // Pastor



Suzie // Mother



Abby // College Student



Jay // Business Owner



STEP 2 Connect with Automation

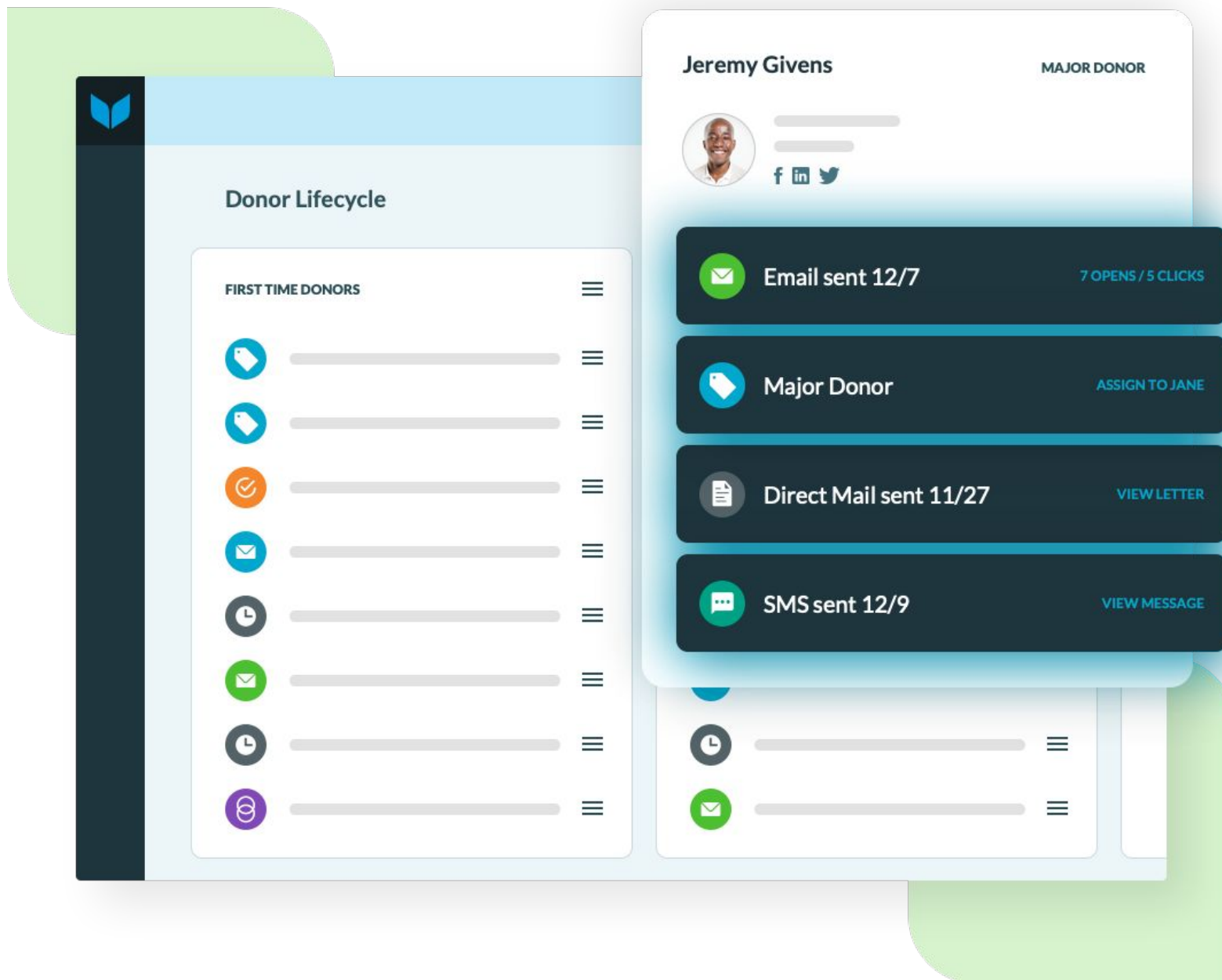
Connect Personally

Multi-Channel

- Email, SMS, Direct Mail, Phone, etc
- Personalized Content

Automation

- Segment in Real Time
- Dynamic Campaigns
- Portfolio Management



RESPONSIVE FUNDRAISING

Example: *Contextual Follow-up & Next Steps*



Kyle, meet Peter.

He leads the team that cared for [Estela](#), the patient from Guatemala you supported, and he wrote you this note:

"Kyle, you and Watsi have done something special, which is allow us to say yes to patients like Estela. It creates hope, revitalizes imaginations, and reshapes medical realities. Happy Valentine's Day. Thanks for being on this journey with us."

This Valentine's Day, support one of Peter's patients.

And dedicate the donation to someone you love!

[VIEW PATIENTS](#)

Tactical Examples

Welcome Series

Introduce new supporters to your cause, and recommend next steps.

- Auto-append **wealth and social data**
- Auto-**segment** donor
- **SMS 1** : Thank you text with link
- **Email 1** : Thank you email with personal connection
- **SMS 2** : Link to current story
- **Email 2** : Email with stories of impact
- **Postcard** : Impact highlight postcard
- **Phone call** : Thanks from program team
- **Email 3** : Initial appeal for recurring gift
- **Mail appeal** for recurring gift



AUTOMATION #2

Supporter Milestones

Proactively celebrate key moments of engagement.

- Birthdays
- Anniversaries
- LTD Giving Levels
- Volunteer Hours
- Graduation Date
- Partnership Level



Portfolio Management

Surface key relationships and streamline portfolio assignments.

- Auto-append social wealth data. Track behavior,
- Auto-assign portfolios based on criteria
- Dynamically assign tasks MGOs based on behavior
- Scale personalized communications (SMS, email, mail) and free up time form more outreach



AUTOMATION #5

Sustainer Activation

Identify monthly donors and activate action

- Identify prospects (2+ gifts under \$250)
- Send recurring invites to key donors
- Drive to subscription giving product landing page
- SMS/Mail follow-up



BONUS IDEAS!!!



Rid your team of redundant back-office tasks, automate follow-up and driven engagement

- Dynamic segmentation
- Lapsed reactivation series
- Volunteer activation
- Alumni and giving circles
- Grateful patient engagement
- Event follow-up
- Thank you call tasks for program team
- Data management and clean-up
- Gift acknowledgment and receipting

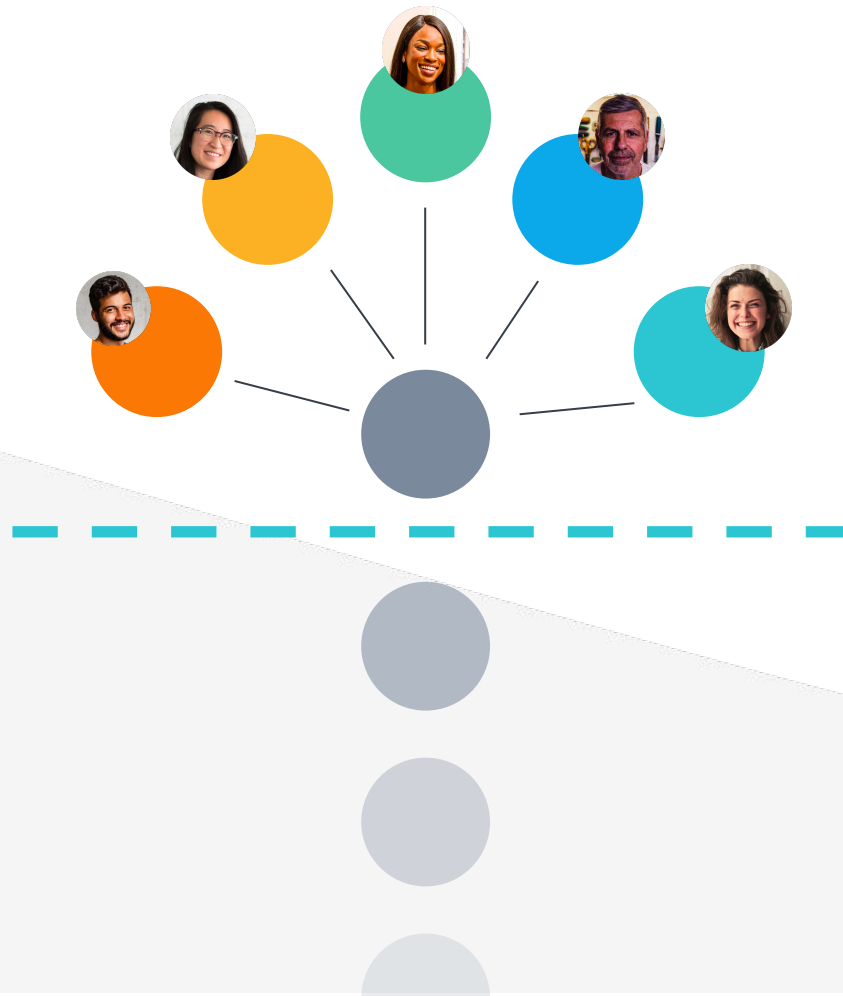


Your Nonprofit Has A Choice

Will you carry on or adapt your system to grow?

Traditional

Disjointed, Static, Siloed



OR

Responsive

Dynamic, Personal, Multi-Channel

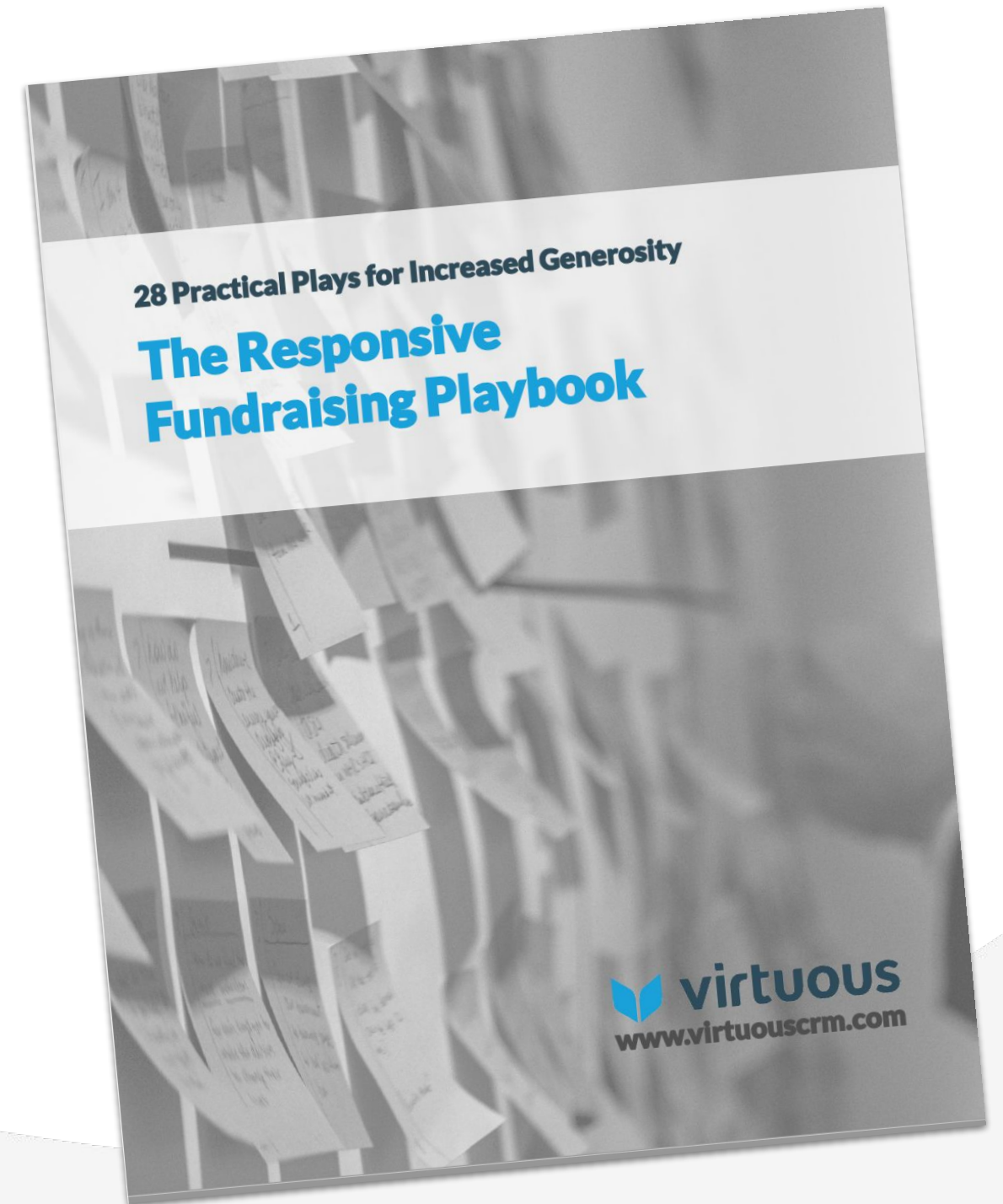


Offer: The Responsive Fundraising Pack



Send an email to responsive@virtuous.org with subject line “**Converge**” and I’ll send you:

- A 30-minute video showcasing the why and how of responsive fundraising
- The 100+ Page Responsive Fundraising Blueprint & Playbook
- A self-paced Responsive Assessment to benchmark your nonprofit’s fundraising





Welcome Beth Fisher

Chief Advancement Officer
Mel Trotter Ministries

A growth partner for nonprofit teams

Virtuous is a software company committed to helping nonprofits grow generosity.

From responsive fundraising platforms and playbooks to hands-on support from real people who care about your success.



**Thank
You**



Mary Beth Pate

Executive Director, Enterprise
Marketing & Philanthropy
Communications
Cleveland Clinic



Trent Ricker

CEO
Pursuant

BREAK



DEB TAFT
CEO
Lindauer



Talent 2021: Navigating Winds and Waves Forward

Deb Taft | CEO, Lindauer



Converge on Talent

Context

Deeper Dives

Solutions Forward

Our 2021 Talent Context

The Great Resignation



40% of professionals are projected to leave their current employer

Mid-career + manager-level departures growing fastest

Elimination of pandemic benefits in 2021 did not restore workforce

Freelancers / “gig” workers projected to make up 50+% of workers by 2027

Workforce in Motion



Health

Life
Meaning

Mission
Passion

Family

Safety

Campaigns

Commutes

Compensation

Caretakers

Digital Work

Equity +
Inclusion

Remote /
Hybrid

Leadership
Transitions

Vaccines

Impacts, Challenges, Opportunities

2021 CONVERGE | HILTON HEAD ISLAND, SC | OCTOBER 17-19, 2021



Organizational Culture

*“Talented people want to work
for organizations
with strong cultures.”*

Gallup



New Roles, Structures, Competencies



01

Team structures were broken or shifted in 2020. New models emerging.

02

Roles and expectations transformed.

03

Ability to navigate both digital and in-person with ease and expertise became paramount.

04

“Digital” officers. Truly different?

05

Will we finally hire more – and successfully – from other sectors?

06

On average, employees receive 42 hours of training per year. (Industry Report)



HARD SKILLS

are often easier to assess
and build into onboarding + training

SOFT SKILLS

“Organizational culture and politics, not lack of competence or managerial skill, were the primary reasons for failure.”

Harvard Business Review

Remote / Hybrid / In-Office Modes of Work

- Maturity of organization / program
- New vs. established leaders
- Fairness / equity considerations
- Digital access
- Comp design, state compliance
- Budgeting for new models
- Meeting design, culture work



Designing what's right for our organizations.

Expect Hybrid as a continuing norm

Pandemics

Natural Disasters

Fires

Storms

Floods

Regional Disruptions

Disease Outbreaks

Conflict

Economic Forces

Industry Disruption

01 Expect disruption, integrate hybrid approaches as normal.

02 Top talent is always in demand.

03 The global talent shortage almost doubled in past decade. Hold onto our teams.

04 “Winners” hire *before* markets rebound. Prepare to hire and onboard.

05 Demand for virtual and hybrid roles is high; need to be able to attract and onboard this top talent.

Diversity Equity Inclusion

*#1 request
from our
nonprofit
partners*

87% of surveyed companies indicate management believes **hiring a diverse workforce is important**. (Yello)

81% of companies have **diversity recruiting strategies**. (Yello)

Women's participation in the workforce has dropped to 57%, the lowest since 1988. (Barrons)

Organizations are **reducing bias in the hiring process**, revamping search committees, interviews, site visits.

Securing Black, Brown, AAPI and Indigenous talent takes funding and active, consistent work.



Belonging, Hiring, Retention



#notadiversecandidate

Individuals bring experience, talents and competencies we need – *and* diverse lived experience.

Tough questions about where we are in our DEIB journey? *Being authentic is key.*

Hiring leaders reframing from “**pipeline problem**” to acknowledging systemic factors and adjusting process.

New leaders **don’t want to be “the one”** to transform our organizations.

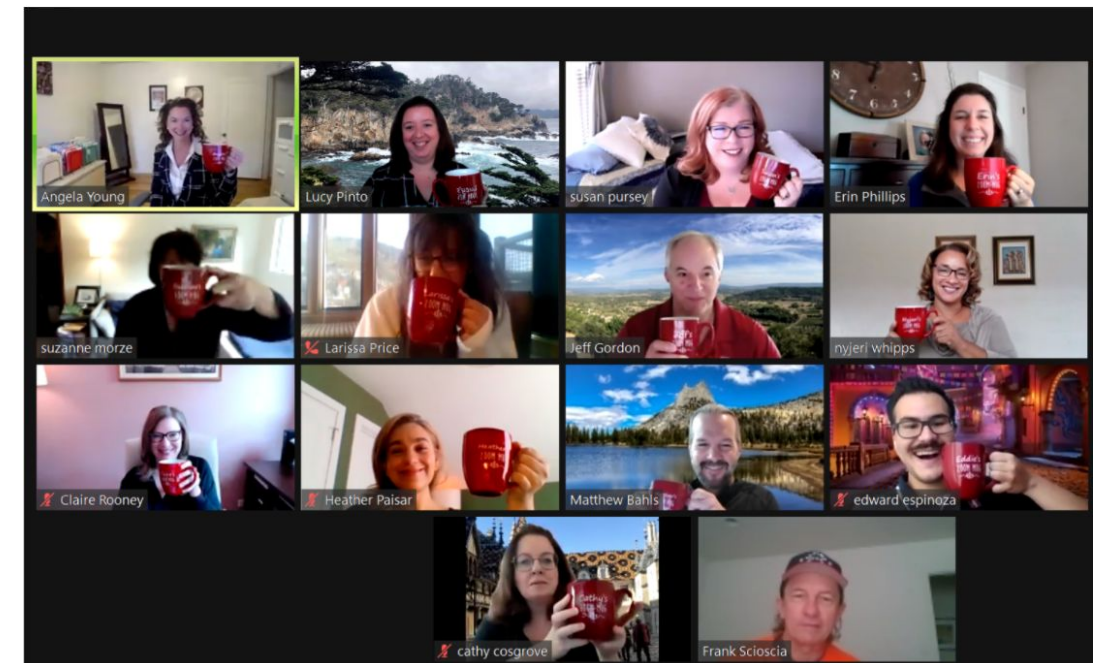
Shifting emphasis off the employee to code shift and be 10X as good. Developing our majority leaders, managers and colleagues to create success.

Retaining Top Talent

- Talent Reviews (9 box, 2x2)
- Onboarding
- High communication + engagement
- Transparency on plans + priorities
- Engage employees in planning + solutions
- Effective Meetings
- Deeper Quarterly 1-1s / Career Pathing

May 2021 Survey* of 2,000 employees in U.S. + Canada:

- 1/3 planned to leave for higher compensation
- **2/3 cited other reasons that essentially comprise company culture**
- 1 / 4 sought better work-life balance
- 1/5 sought greater recognition for their work
- 15% cited values and relationships



Onboarding

Onboarding and retention have an established relationship:

- **Improves new hire retention by 82%.**
- 86% of new employees **decide to stay or go** within first 6 months
- Organizations **lose up to 20% of new hires within first 45 days.**
- **58% more likely to stay 3+ years** if structured onboarding



- ✓ **Begin before day 1**
- ✓ **Ensure time with direct manager**
- ✓ **Outline performance goals**
- ✓ **Assign a buddy**

Planning + Engagement in Planning



Strategic use of valuable meeting time



Measuring Productivity, Ensuring Accountability





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**Thank
You**