



SUPPORTER EXPERIENCE REPORT 2024

Building Direct Mail capability for better Supporter Experience.



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Foreword

With Direct Mail still such a dominant channel for charities, it felt timely to take a deeper dive into how this capability is being developed to deliver better experiences.

Research we carried out this time last year reflected a sector on the cusp of transformation with senior buy-in, major investment and a real sense of momentum.

Fast forward to this year and the reality appears more challenging.

This report highlights a significant gap between Supporter Experience vision and the capability organisations have today to deliver better experiences via this channel.

Issues with data continue to create significant blockers, teams are at full stretch and there are mixed results emerging from new Customer Relationship Management (CRM) implementations.

Problems persist with essential foundational capability relating to data, tools and ways of working, undermining teams’ efforts to take a truly supporter-led approach. In the research just a quarter say that ways of working are designed with supporter strategy in mind – surely this needs to change.

The financial context clearly doesn’t help. With extreme pressure on budgets impacting teams, there is simply less time to invest now in change initiatives that will improve things in the longer term. It can seem like a Catch-22 situation. Capacity is tight, meaning few are very focused on streamlining and improving internal ways of working, so teams continue to be stretched.

So, how can charities move forward? We know from looking at other sectors, that focusing on Customer Experience will deliver competitive advantage. Better Supporter Experience is not a ‘nice to have’, but it is so very difficult to make the case for investing further in the change. Especially when it’s hard to measure progress and organisations have already spent six figure sums on new CRM technology.

Whilst that investment is clearly a positive thing, we now need to see effort going into the people, data and process change that is necessary to adopt truly supporter-led approaches and unlock greater value from those investments.

The truth is that fundraisers will only release the value, in terms of Supporter Experience, if they become really good ‘customers’ of their colleagues in data and tech. This means being clear and specific about their requirements and sharing the context with those colleagues.

In our experience, aligning experts from data, IT, operations and fundraising behind the Supporter Experience challenge leads to much faster progress. And working together to map capability against the Supporter Experience vision is a relatively quick and easy place to start.

Our survey suggests that many teams are experiencing challenging times, having to deal with so much change against a tough financial backdrop.

We hope this report provides food for thought and prompts positive discussions in your organisation, wherever you and your colleagues are on this journey.



Emily Gore
Chief Client Officer

Research summary

This research focuses on how well charities are meeting supporter needs in the Direct Mail channel.

We surveyed 76 charity professionals to explore sector maturity regarding key aspects of capability to explore how their Direct Mail capability supports their Supporter Experience ambition.

Mind the gap

The survey results show that Supporter Experience is championed at a senior level in just over half of organisations. Despite this, fewer than 1 in four were able to say that ways of working have been designed with supporter strategy in mind or that their Direct Mail production capability is well-aligned with that overall supporter strategy. There is little evidence of budgets increasing to meet this challenge.

Barriers

Teams are dealing with multiple barriers, the greatest of these being team capacity, which was named a top 3 barrier by more than half and mentioned by more than three quarters of those who responded. Limited visibility of journeys, a lack of supporter insight and restrictive budgets also ranked highly.

Programme focus

When it comes to their direct marketing programmes, charities are most focused on reducing outsourced costs, then improving Supporter Experience, then reducing carbon impact and least focused on streamlining internal ways of working.

Improving Supporter Experience

Around one in four charities is very focused on improving Supporter Experience through their Direct Mail programme. To date, this is most likely to have taken the form of journey reviews or segment redefinition.

Reducing costs

Half of the organisations surveyed describe themselves as very focused on reducing the cost of outsourced print and postage. Just over half have sought to do this through a supplier review with just over a third undertaking a format or channel review.

Fewer than two in ten charities are very focused on streamlining and improving internal ways of working. They are most likely to have standardised data protocols and project documentation.



Research summary (continued)

Data issues

Only one in four organisations has access to data insight to inform and continuously improve Supporter Experience. Campaign data availability is also a problem for many.

Lowering environmental impact

Around three quarters of respondents say they are focused, to some extent, on reducing the environmental impact of their Direct Mail programmes. Half of those surveyed either don't have any specific environmental objectives relating to their Direct Mail programme, or they don't know what they are. Fewer than one in ten work for an organisation with objectives to reduce their impact by a specific amount within a certain timeframe and around the same amount have committed to an external standard.

Getting to grips with the tech

Survey results confirm that the wave of investment in new CRM technology continues, with Microsoft Dynamics remaining the most popular choice. Some are already seeing a positive impact of these new systems, although others are experiencing issues and for some it is still too early to tell. Issues reported relate to data blockers, lack of training, and teams not being consulted on Direct Mail requirements during implementation.

Summary

Although results suggest that many charities are committed to better Supporter Experience, initiatives on the ground do not reflect that ambition. Teams are experiencing multiple barriers, including timely access to the data required to support truly audience-led communications. With extreme pressure on budgets, efforts are very focused on cost reduction initiatives. Objectives for environmental impact reduction, do not appear to reflect the fact that this is reported as an area of some focus for many organisations. And, despite a willingness to fund big ticket technology purchases, there has been significantly less investment in the foundational people, process and data work needed for better communications grounded in supporter strategy.



Key findings

28%

say their Direct Mail production capability enables them to effectively deliver on their Supporter Experience ambition

24%

of organisations are very focused on improving Supporter Experience in Direct Mail

77%

say team capacity is a barrier

22%

say personalisation capability is good

17%

are very focused on streamlining and improving internal ways of working

50%

experience delays in data supply

42%

say visibility of journeys is poor

Just 1 in 4

has timely access to data insight to inform and continuously improve Supporter Experience.



SECTION ONE

Mind the gap

Although Supporter Experience is championed at a senior management level within just over half of responders' organisations, this does not appear to be driving improvement in Direct Mail capability.

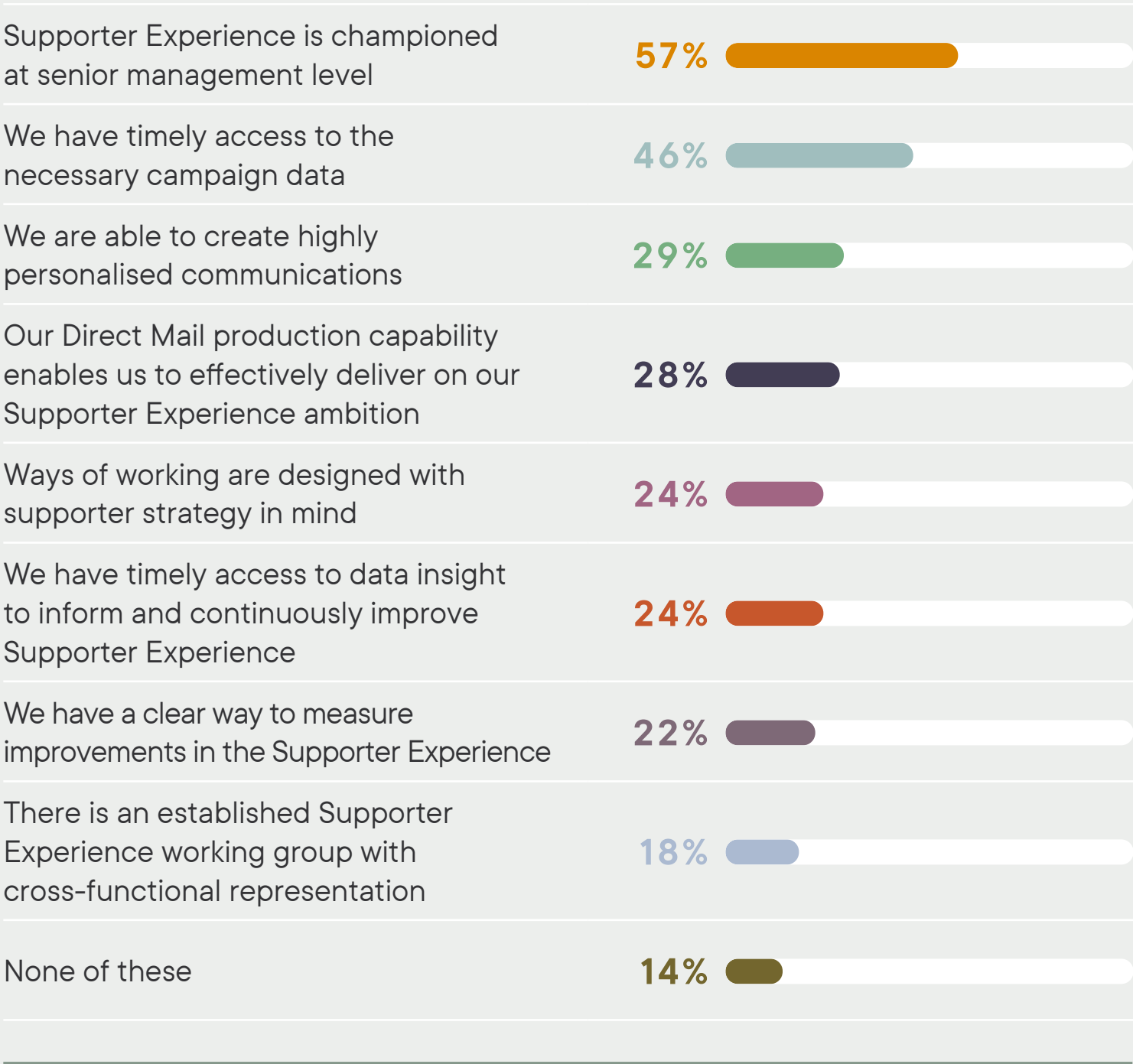
Just 17% feel that their Direct Mail capability is well-aligned with their supporter strategy and almost two thirds are working with a budget that is the same or lower than the last financial year.

Just under half have timely access to campaign data and only a quarter feel their Direct Mail production capability enables them to deliver effectively on their Supporter Experience ambition.

When it comes to reporting and understanding success, just two in ten have a clear way to measure improvements.



Organisation focus on Supporter Experience



Q1. Which of the following is true of your organisation?
Base: All respondents (76)

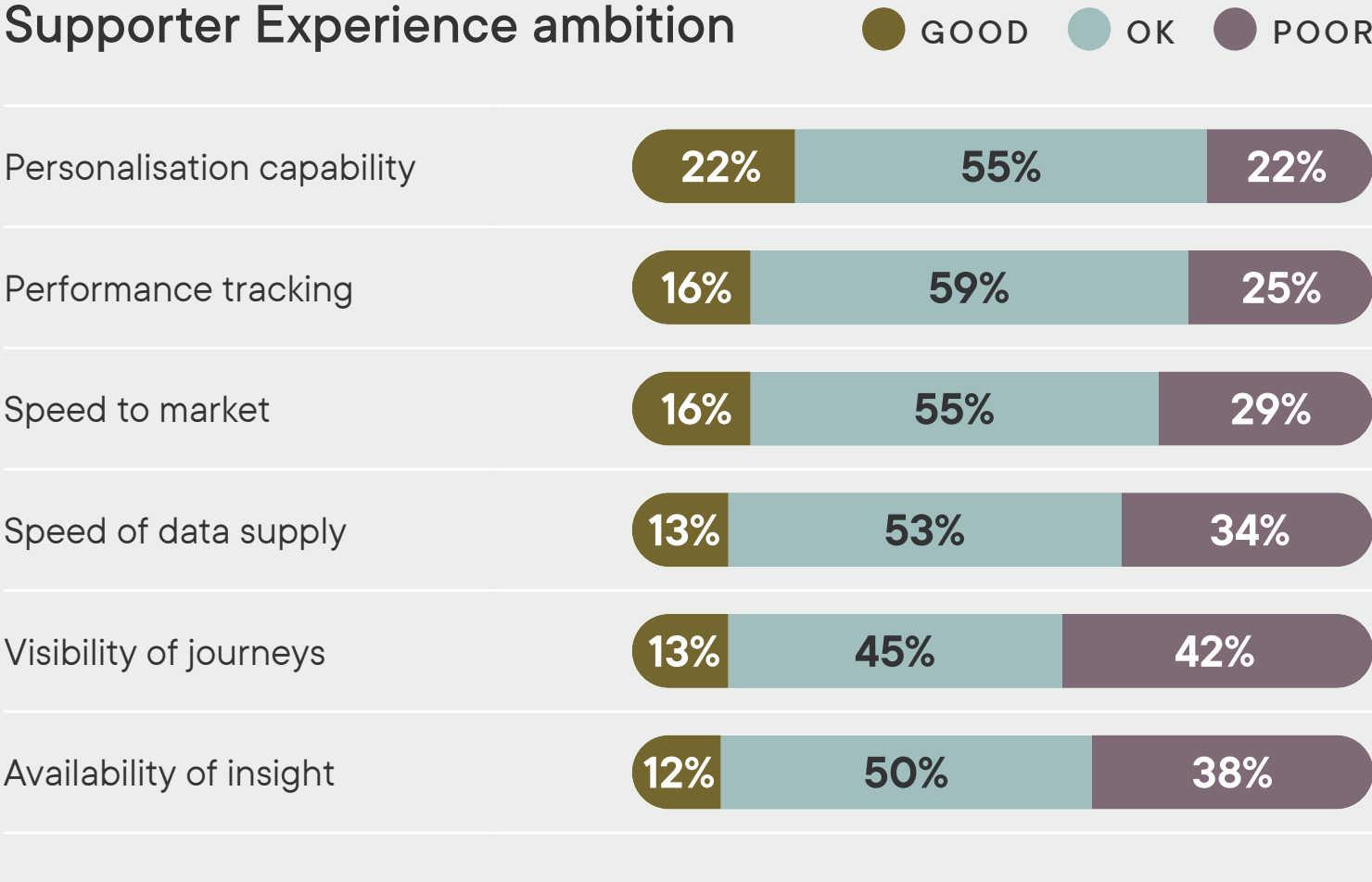
SECTION ONE

Mind the gap (continued)

Drilling down into specific elements of Direct Mail capability, fewer than two in ten would describe any of these elements as good – with the exception of personalisation which is rated as good by just 22%.

Over a third say that visibility of journeys, availability of insight and speed of data supply is poor.

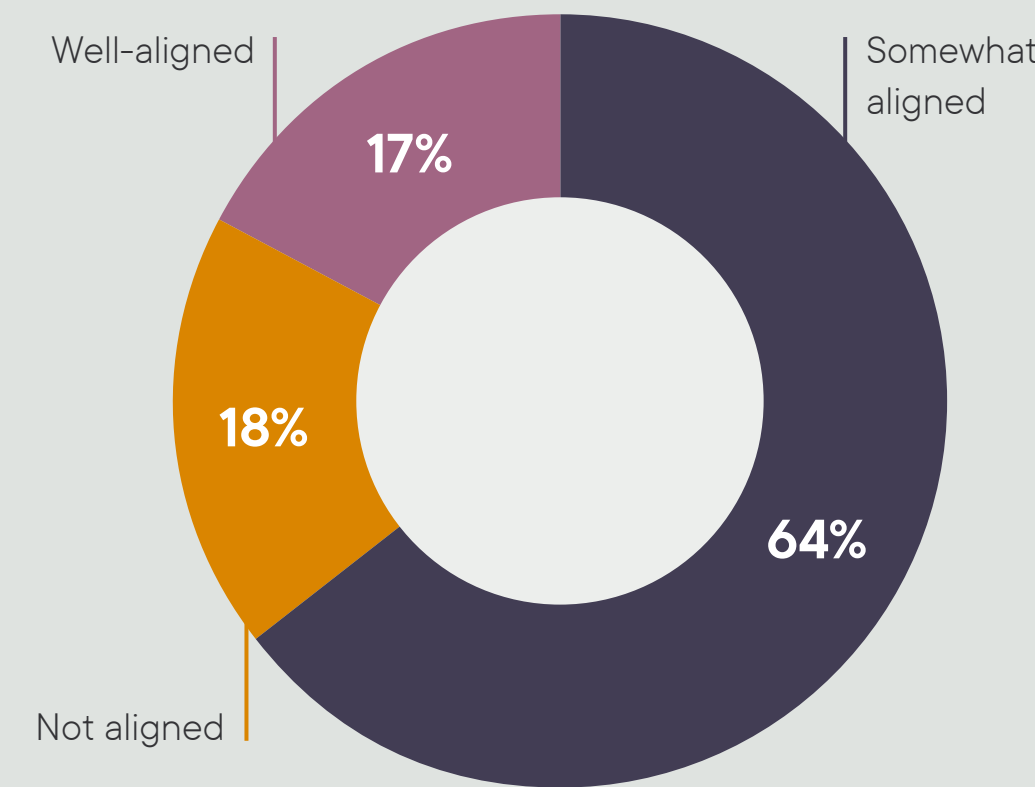
Direct Mail capabilities meeting
Supporter Experience ambition



Q2. How well does your Direct Mail production capability meet the requirements of your Supporter Experience ambition when it comes to...

Base: All respondents (76)

Direct Mail production capability alignment
with overall supporter strategy



Q3. How aligned is your Direct Mail production capability with overall supporter strategy?

SIGNAL VIEW

- Translating Supporter Experience aspiration into better experiences requires a vision, strong, capable leadership and a well-managed programme of change. Effective cross-functional working, focused on supporter-led strategy is an essential component of this.
- The role of data should not be underestimated. Data challenges are commonly reported blockers when it comes to a team's ability to deliver communications that are more timely and highly-personalised.
- Being able to measure the impact of improvement initiatives remains a challenge and can be a blocker to investment. Understanding how softer metrics feed into longer term value and retention, and factoring in measures around streamlining and team experience, will help with evidencing the benefits.

SECTION TWO

Barriers

Team capacity was mentioned as a barrier to better Supporter Experience by 77%, with more than half naming it within their top 3.

Limitations of Customer Relationship Management (CRM) systems (old or new) were mentioned by two thirds of respondents - with it being a top 3 barrier for almost a third of responders.

Other commonly noted barriers were limited visibility of journeys and lack of supporter insight. Restrictive budgets followed closely behind.

Affecting around half of respondents were delays to data supply, inability to integrate print with digital channels and time-consuming creative development process.

SIGNAL VIEW

- It's very common for organisations to be dealing with many of the barriers listed and this can feel overwhelming.
- Defining a clear vision for Supporter Experience and using that to build a practical capability development plan will enable teams to align behind the right initiatives. This means they can invest precious time in the areas that will have the biggest impact.
- Many of the barriers are linked and so, resolving one barrier may also have a positive knock-on effect to other areas. For example, standardising data layouts should reduce data supply times, ease pressure on busy teams and facilitate easier working within a new CRM.

Direct Mail capabilities meeting
Supporter Experience ambition



Q4a. Which THREE of the following are the biggest barriers to better Supporter Experience when it comes to the Direct Mail production capability within your organisation? / Q4b. And which other barriers to Direct Mail production do you face within your organisation?
Base: All respondents (76)

SECTION THREE

Programme focus

When it comes to Direct Mail capability, exactly half say they are very focused on reducing outsourced costs. This is where the most attention is being directed.

A quarter of respondents describe their organisation as very focused on improving the Supporter Experience.

When it comes to reducing the environmental impact of printed communications, just over a fifth say they are very focused on this objective.

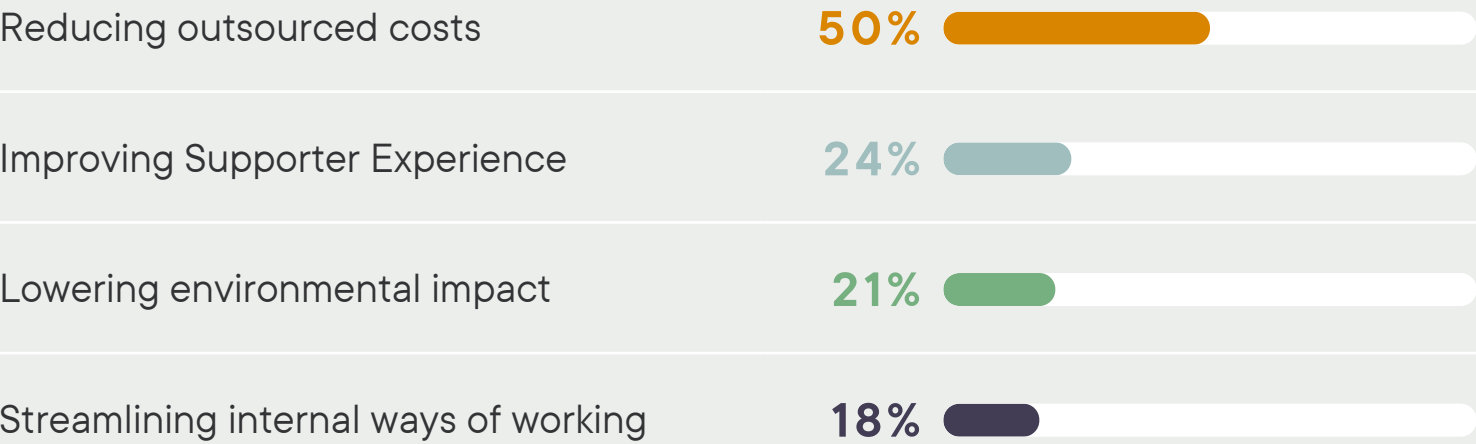
Charities are least focused on streamlining and improving internal ways of working with just 18% reporting this as a high focus area.

SIGNAL VIEW

- Against a backdrop of rising costs and extreme financial pressure, charities, quite rightly, have been striving to secure the best possible costs for outsourced elements of production.
- This focus on cost reduction should be balanced with the need to invest in the development of capability to deliver competitive experiences that will enable organisations to retain and grow relationships with supporters.
- With outsourced production now stripped to it's bare commoditised bones, organisations should turn their attention to the modernisation and streamlining of internal operations. This will lead to the next significant wave of programme cost savings and to a better experience for overstretched teams currently squeezed between budgetary pressure and supporter expectations.



Priority focus for Direct Mail programmes



Q5a. How focused is your organisation on improving Supporter Experience, when it comes to the delivery of your Direct Mail production programme? Base: All respondents (76)

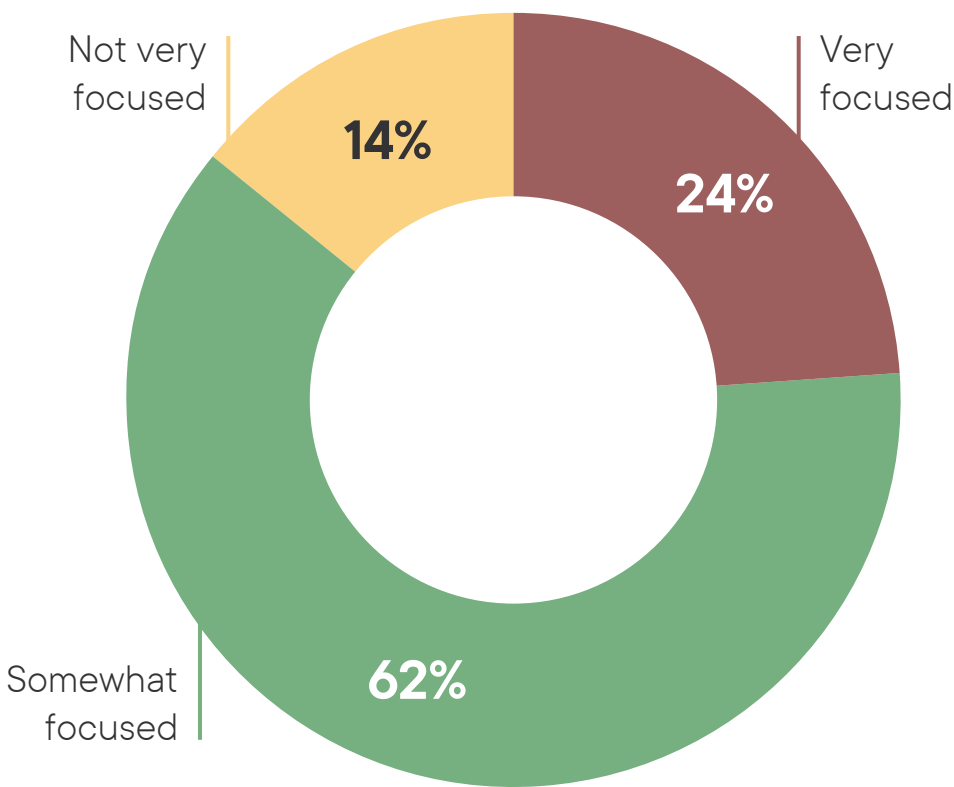
Q6a. How focused is your organisation on streamlining and improving internal ways of working, when it comes to the delivery of your Direct Mail production programme? Base: All respondents (76)

Q7a. How focused is your organisation on reducing the cost of outsourced print, production and postage? Base: All respondents (76)

SECTION FOUR

Improving Supporter Experience

Focus on improving Supporter Experience through Direct Mail production programme



Q5a. How focused is your organisation on improving supporter experience, when it comes to the delivery of your Direct Mail production programme?
Base: All respondents (76)

Most say their organisations are focused, to some extent, on improving the Supporter Experience delivered through their Direct Mail programme.

Just over a third have sought to do this through reviewing or redefining journeys or segments.

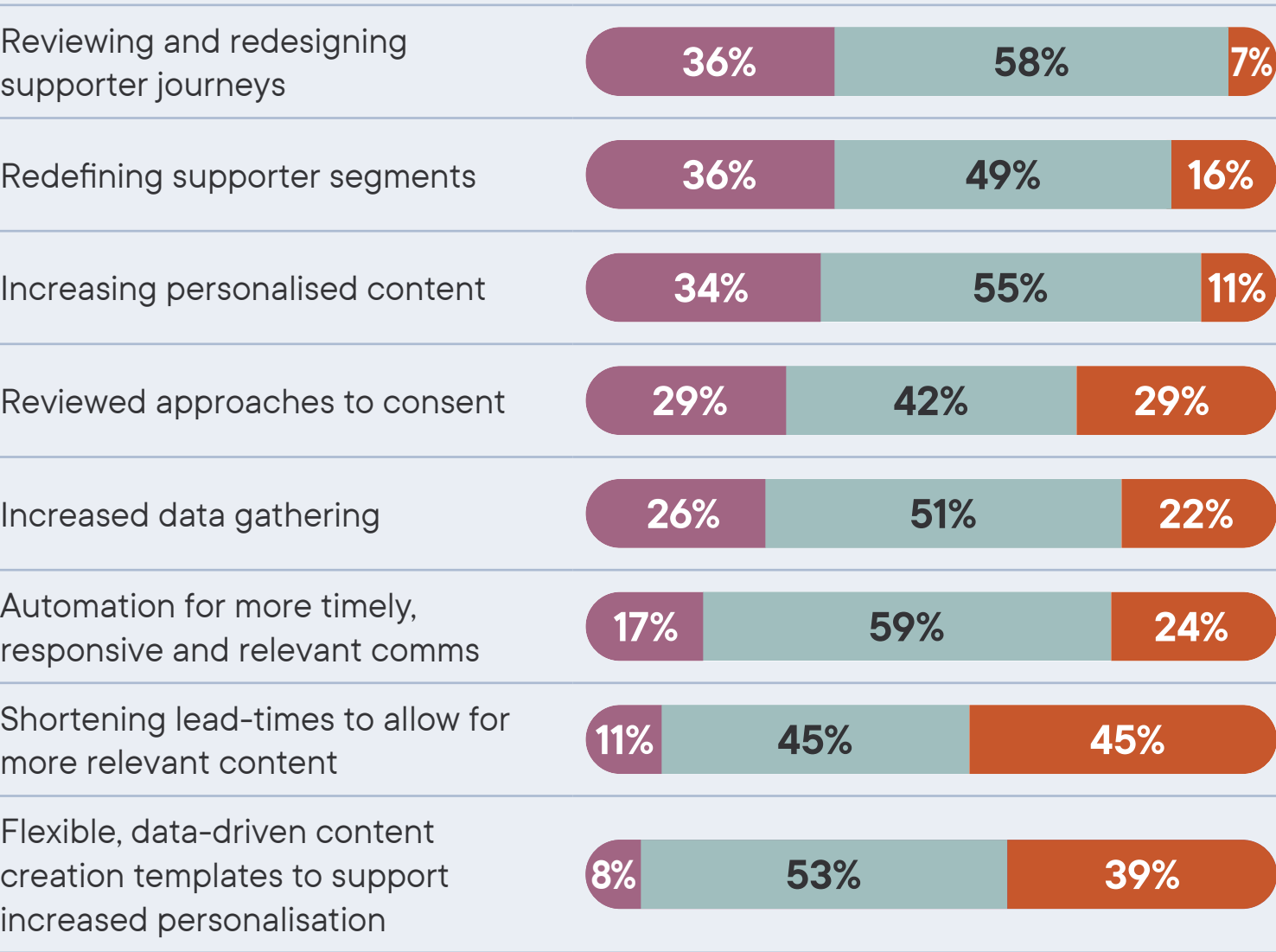
Around half reported having ‘considered, but not implemented’ all of the listed initiatives, which may be the result of barriers described in section 2. (e.g. team capacity, system/process limitations).

Organisations are least likely to have considered or implemented flexible, data-driven content templates.

SIGNAL VIEW

- Despite a desire to focus on improving Supporter Experience, it can be difficult for organisations to develop a practical plan and make the changes required to capability to make better communications possible in practice.
- Teams are juggling many initiatives alongside busy day jobs, which mean that time to focus on programmes of change can be extremely limited. Especially in a context where hiring freezes or reduction of team sizes is not uncommon.
- Organisations must be willing to invest in reviewing and developing capability if they want to reap the benefits of better Supporter Experience.

Processes implemented or considered within Direct Mail production to improve Supporter Experience



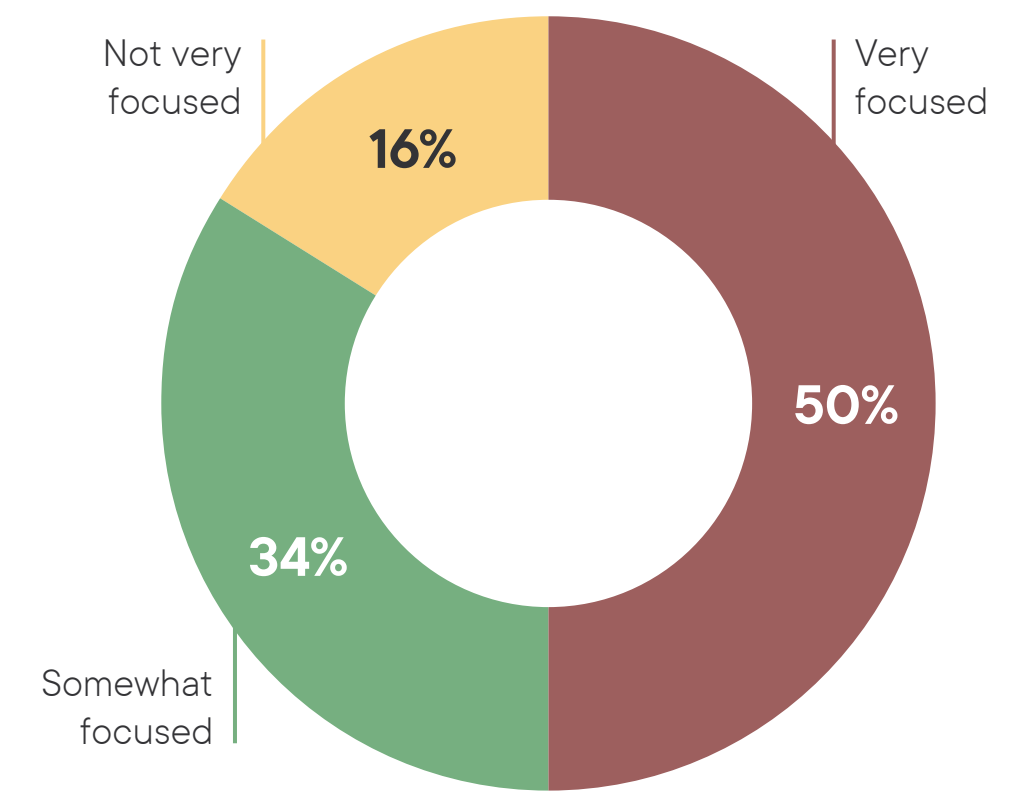
- IMPLEMENTED
- CONSIDERED BUT NOT IMPLEMENTED
- NEITHER CONSIDERED NOR IMPLEMENTED

Q5b. Which of the following has your organisation considered or implemented within your Direct Mail production programme to improve Supporter Experience?
Base: All respondents (76)

SECTION FIVE

Reducing costs

Focus on reducing the cost of outsourced print production and postage



Q7a. How focused is your organisation on reducing the cost of outsourced print, production and postage?
Base: All respondents (76)

The majority are focused on reducing outsourced print and postage costs with more than half carrying out a supplier review.

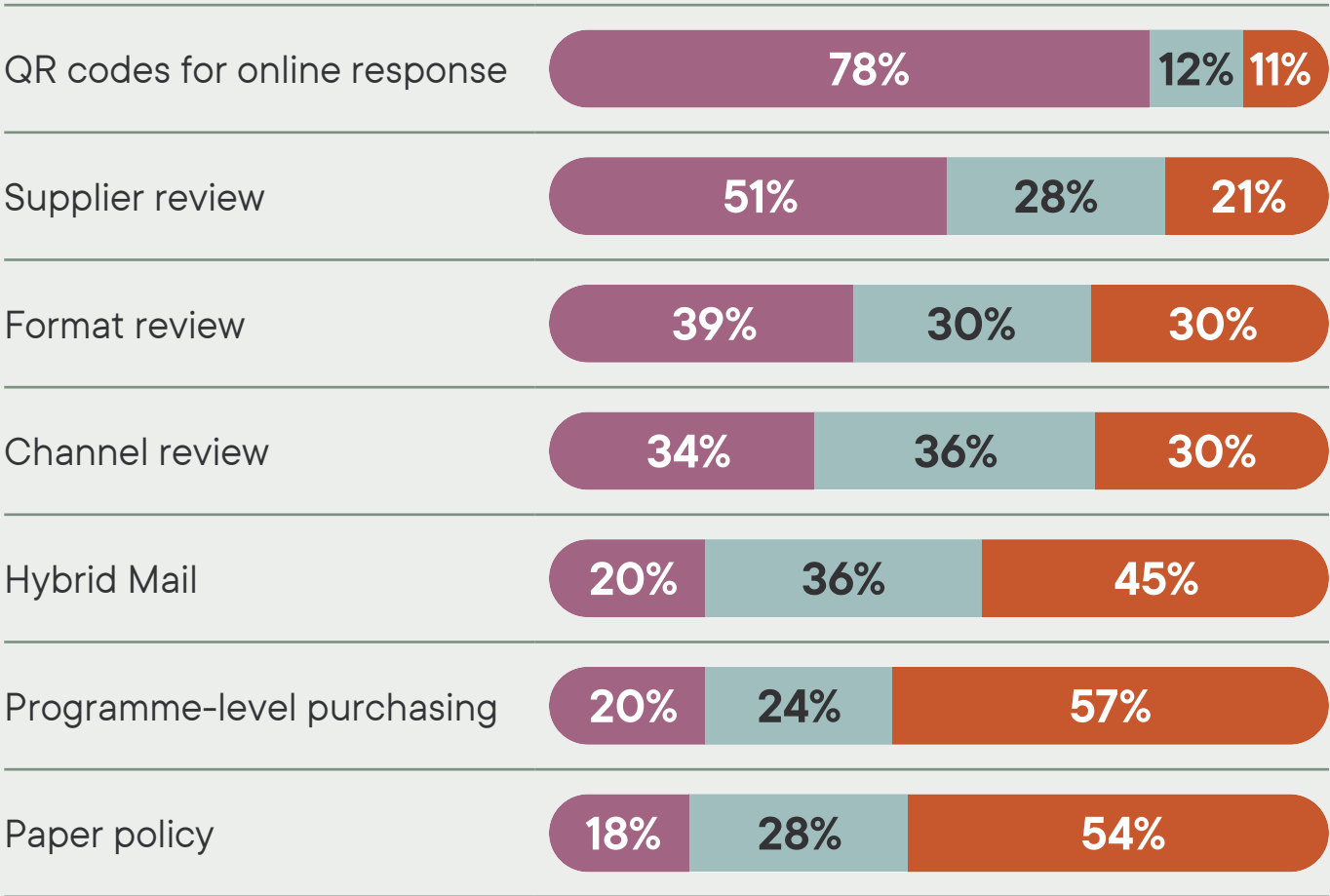
QR codes have been adopted by almost eight out of ten charities as a quick and easy way to drive responses online.

Over a third have implemented format or channel reviews.

SIGNAL VIEW

- When reviewing suppliers, organisations should look for a partner who can support them in developing their Direct Mail capability as well as delivering their programme as it currently stands. This is because the greatest savings, over the next three years, will come from a more fundamental shift in how Direct Mail programmes are planned and delivered.
- It's important to ensure that contract pricing negotiations include all known activity and cover examples of all project types to avoid unwelcome surprises during the course of the contract.

Processes implemented or considered to reduce the cost of outsourced print production and postage



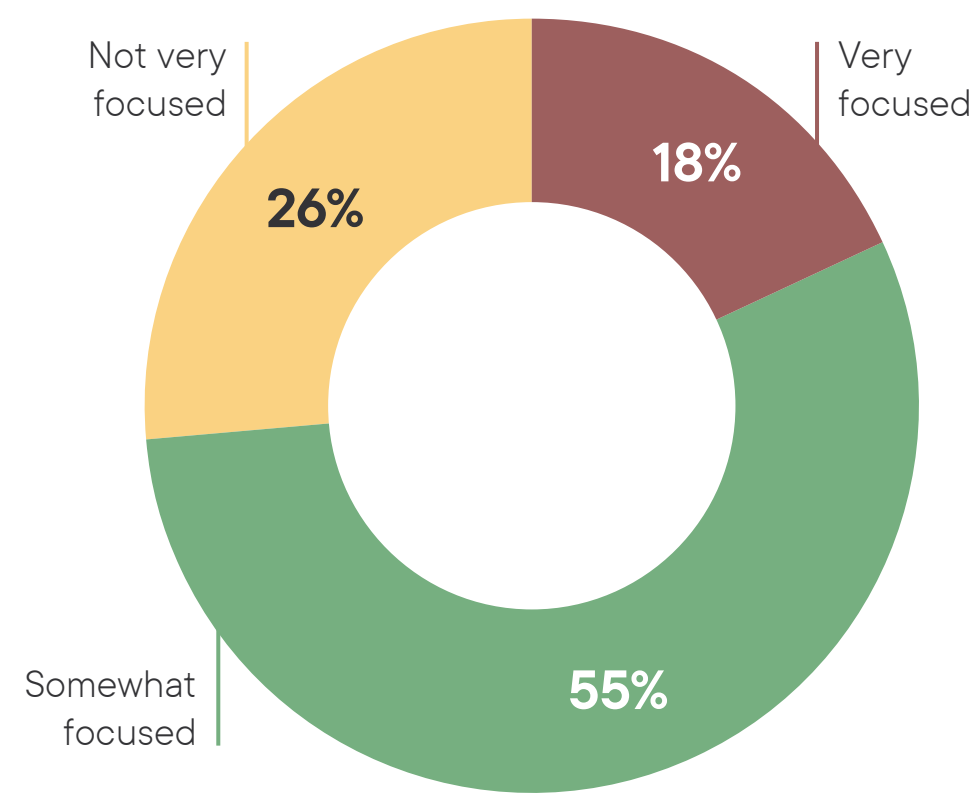
- IMPLEMENTED
- CONSIDERED BUT NOT IMPLEMENTED
- NEITHER CONSIDERED NOR IMPLEMENTED

Q7b. Which of the following has your organisation considered or implemented to reduce the cost of outsourced print, production and postage?
Base: All respondents (76)

SECTION FIVE

Reducing the cost of programme delivery (continued)

Focus on streamlining and improving internal ways of working with Direct Mail production programme



Q6a. How focused is your organisation on streamlining and improving internal ways of working, when it comes to the delivery of your Direct Mail production programme? Base: All respondents (76)

One in four charities describe themselves as 'not very focused' on this.

They are most likely to have standardised data protocols or documentation.

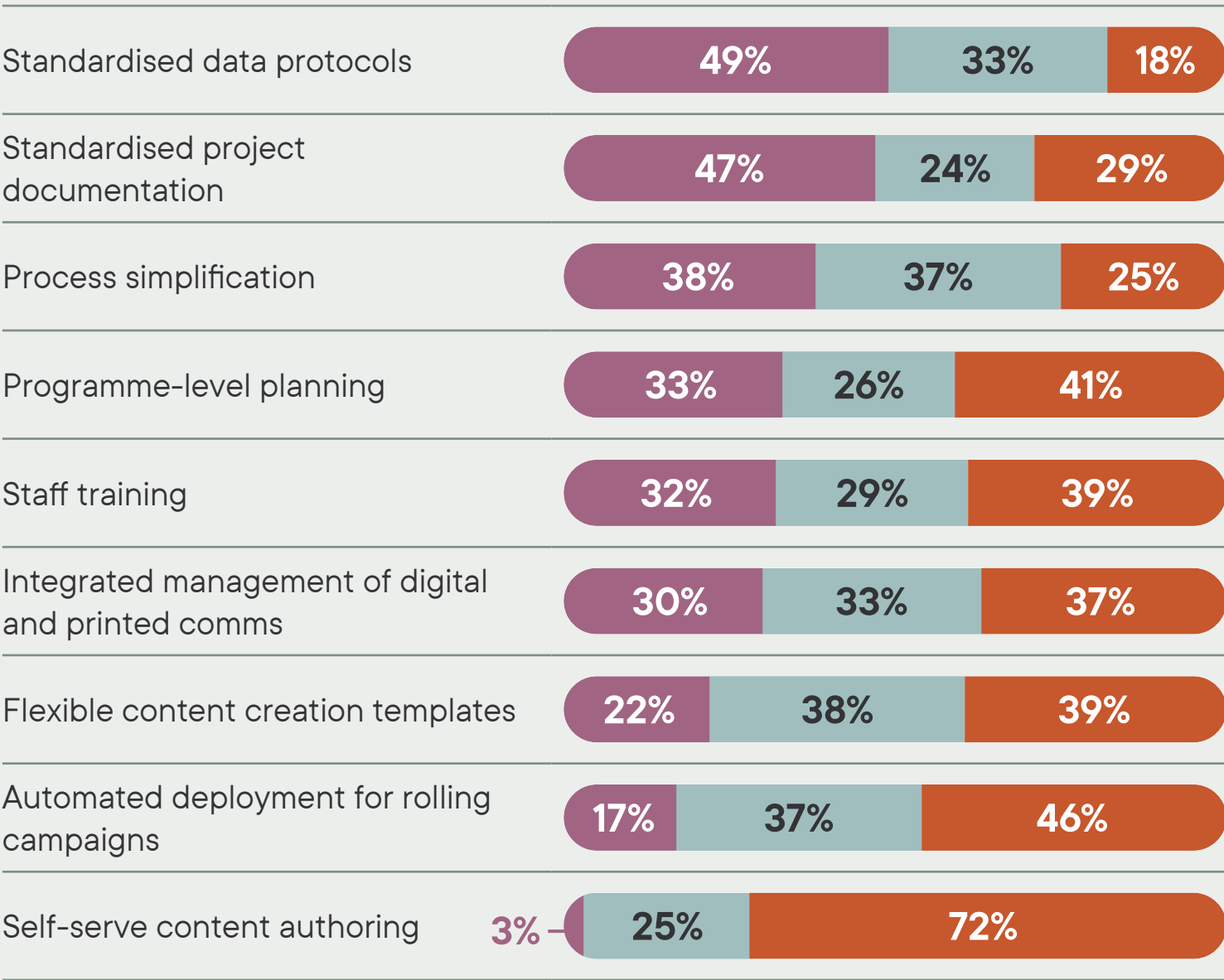
Just over a third have simplified process, trained staff or adopted a programme-level planning approach.

They are least likely to have implemented flexible creative templates, automated deployment, or self-serve content authoring.

SIGNAL VIEW

- A more extensive review of ways of working is the next frontier in terms of cost saving opportunity. Although many have carried out some standardisation and training work, more radical approaches are necessary to unlock capacity for busy teams.
- Exercises like redefining the creative development process to use templates and automating repeat activity can reduce time, not only for internal teams, but also the time agency partners will need to spend on (and charge for) the work.
- With data issues providing challenges for many teams, finding ways to standardise and streamline data supply will be effort well spent.

Processes implemented or considered within Direct Mail production to improve internal ways of working



- IMPLEMENTED
- CONSIDERED BUT NOT IMPLEMENTED
- NEITHER CONSIDERED NOR IMPLEMENTED

Q6b. Which of the following has your organisation considered or implemented to streamline and improve ways of working when it comes to the management of your Direct Mail production programme? Base: All respondents (76)

SECTION SIX

Data issues

Issues with data continue to be a stumbling block for many organisations.

Less than half say they have access to necessary campaign data, with around a third saying the speed of data supply is poor. Half say limited resource in data leads to these supply delays.

Fewer than one in four have a clear way to measure improvements in the Supporter Experience.

Just 1 in 4

has timely access to data insight to inform and continuously improve Supporter Experience.

SIGNAL VIEW

- Data is such a critical component of any audience-led Direct Mail programme and yet so many teams are still having to work with unresolved challenges in this space.
- Charities need to remove these blockers by dedicating resource and budget to developing the skills and processes to ensure that insight and campaign data are readily available.
- Focus on Supporter Experience and the wave of CRM implementations mean weaknesses in data are firmly in the spotlight. To deliver better experiences and reduce the burden on busy teams, organisations must carry out a thorough review of data capability.

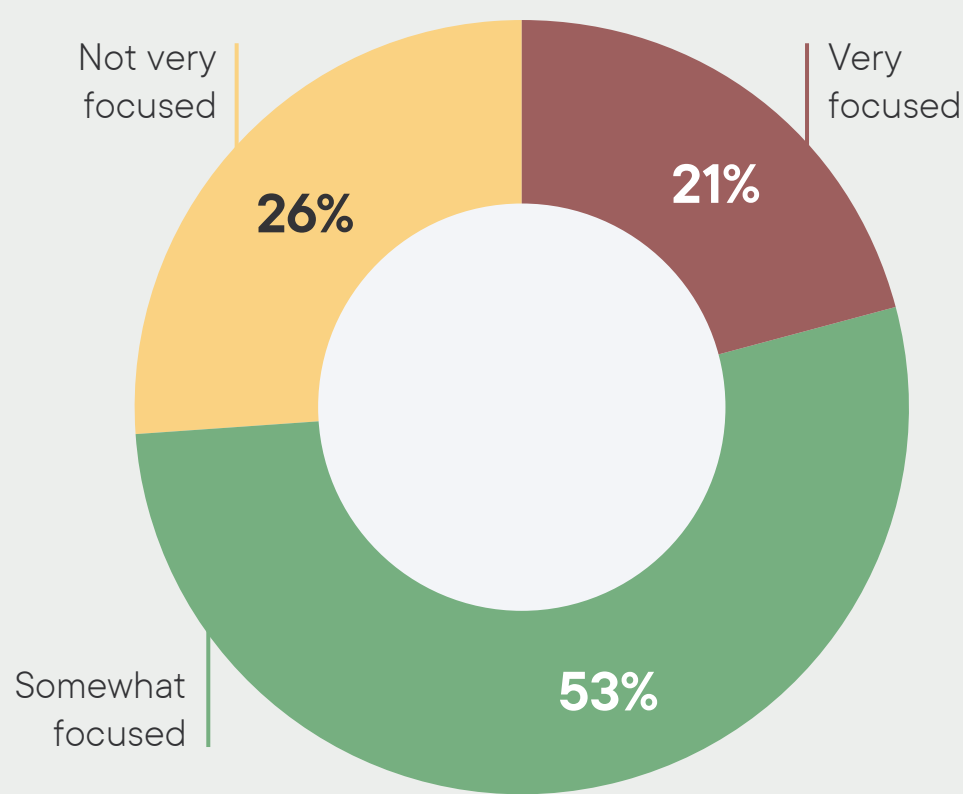
Q1. Which of the following is true of your organisation?
Q2. How well does your Direct Mail production capability meet the requirements of your Supporter Experience ambition when it comes to...
Q4a. Which THREE of the following are the biggest barriers to better Supporter Experience when it comes to the Direct Mail production capability within your organisation?
Q4b. And which other barriers to Direct Mail production do you face within your organisation?
Q5b. Which of the following has your organisation considered or implemented within your Direct Mail production programme to improve Supporter Experience?
Q6b. Which of the following has your organisation considered or implemented to streamline and improve ways of working when it comes to the management of your Direct Mail production programme?
Base: All respondents (76)



SECTION SEVEN

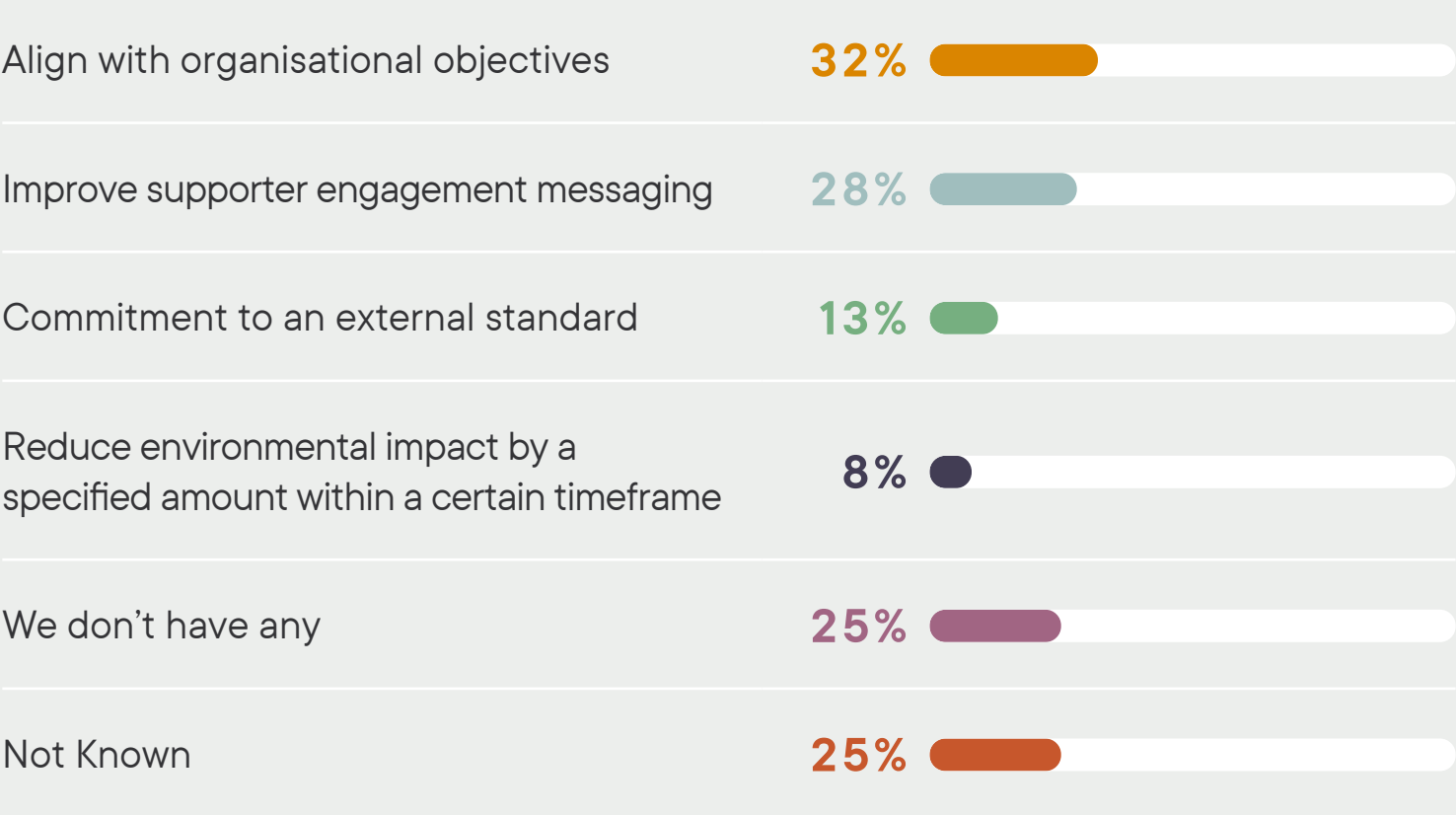
Lowering environmental impact

Focus on lowering environmental impact of Direct Mail programme



Q8a. How focused is your organisation on lowering the environmental impact of your Direct Mail programme?
Base: All respondents (76)

Environmental objectives relating to Direct Mail programme



Q8b. What environmental objectives do you have relating to your Direct Mail programme?
Base: All respondents (76)

21% of respondents describe their organisations as very focused on reducing the environmental impact of their Direct Mail programme. A further 53% say they are somewhat focused, meaning about three quarters of organisations are focused, to some extent, on this objective.

However, half of respondents reported that their organisations have no specific environmental objectives relating to their Direct Mail programmes, or that they don't know what they are.

Of those who do have objectives, they were least likely to be conforming to an external standard or specific reduction targets.

SIGNAL VIEW

- Improving supporter messaging is an important way to show commitment and there is much evidence that carbon reduction is an important topic for supporters.
- Clear benchmarking and reporting is required to demonstrate how the work you are doing is lowering the impact of your programme and ensure messaging is authentic.
- The best way to create focus on reducing the impact of your Direct Mail programme is to establish benchmarks, set clear reduction targets and build carbon reduction and review steps into programme planning process.

SECTION EIGHT

Getting to grips with the tech

Investment in new CRM technology remains at a significant level

It's clear that many charities – even smaller organisations – are obtaining the funding to invest in new CRM systems.

With around half adopting a new CRM in the next two years and a further third having done so in the last two years, it's clear that working in the context of a new CRM implementation will be very much the norm for many in the sector.

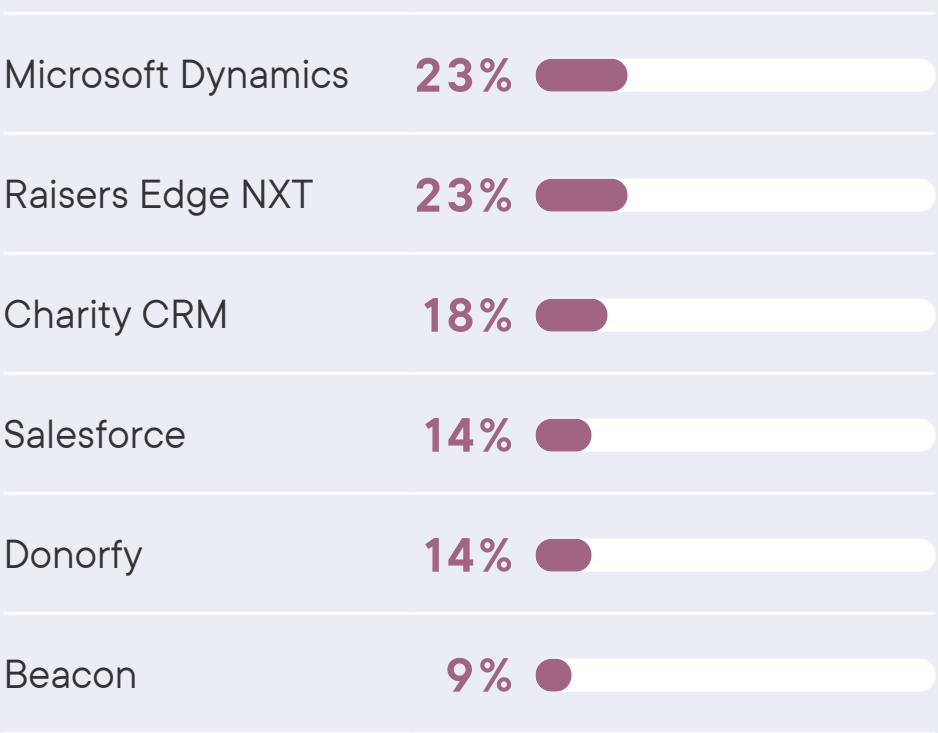
Of those who have adopted or are planning to, Microsoft Dynamics remains the most popular choice, with Raisers Edge NXT also being chosen by just under a quarter.



New CRM system adopted

29%

have adopted a new CRM system in the last 2 years



Q9a. Have you adopted a new CRM system within the last 2 years?

Base: All respondents (76)

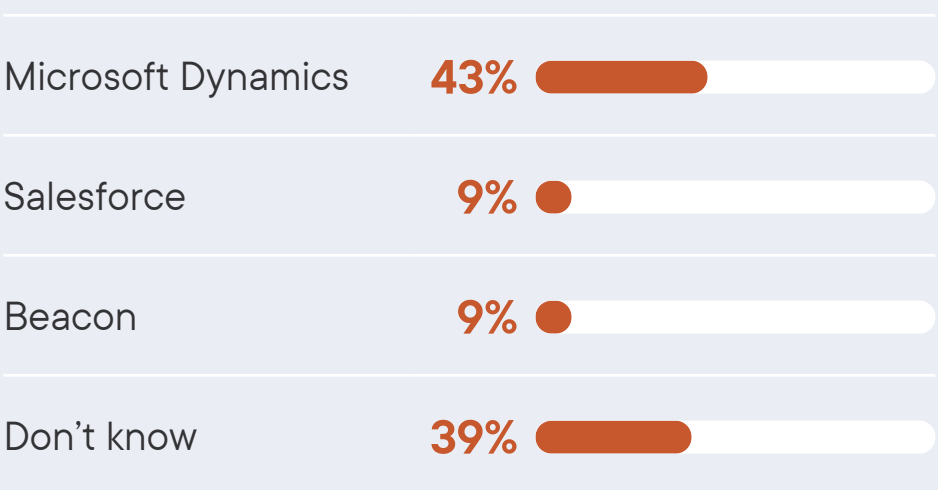
Q9b. Please tell us which one

Base: All who have adopted a new CRM system in the last 2 years (22)

Potential new CRM system

46%

intend to adopt a new CRM system in the next 2 years



Q9g And do you intend to adopt a new CRM system or have a major upgrade within the next 2 years?

Q9h. Please tell us which one

Base: All who have not adopted a new CRM system in the last 2 years (48)

SECTION EIGHT

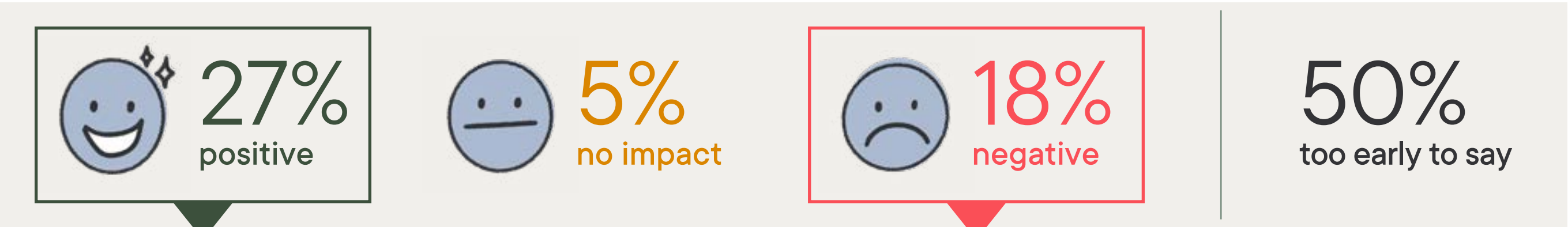
Getting to grips with the tech (continued)

Impact on Supporter Experience

Of those with new CRM systems, around one in four are seeing a positive impact on Supporter Experience. Real-time access to data and integration benefits were noted in the verbatims.

Unfortunately, just under two in ten reported a negative impact. Verbatims point to issues with data, lack of training or expertise and siloed implementation planning.

What impact is your new CRM system having on Supporter Experience?



Allows me to log, monitor and fulfil touchpoints, callbacks and to update notes on profiles. Allows me to integrate Mailchimp to supporter's profiles as a way to contact supporters and to update their profiles automatically.

Able to segment donors and personalise mailings.

Real-time access to data.



The fundraising team and supporter needs weren't involved in scoping and migration. There remains a lack of fundraising CRM expertise organisationally, let alone dynamics FR and implementation so we are dealing with ways forward from this.

Issues with data.

Data migration from the old system has proven tricky, with delays in the new system release of nearly 1 year. Some data has migrated incorrectly or not at all. The new processes feel lengthy and more arduous. Supporters have complained about lead time on receiving mailings, donation acknowledgement and have in some instances experienced a complete lack of response.



Q9c. Is the new system having... Base: All who have adopted a new CRM system in the last 2 years (22)

Q9d. We'd love to hear more about the impact the new system is having on Supporter Experience.... Base: All who have adopted a new CRM system in the last 2 years and having a positive or negative impact (10)

SECTION EIGHT

Getting to grips with the tech (continued)

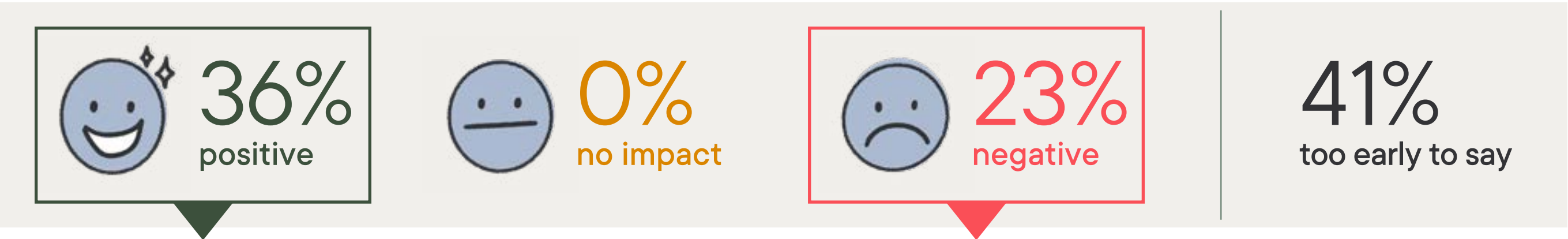
Impact on team experience

New CRM adoption has had a slightly more positive impact on the team experience, with just over a third reporting this. Unfortunately, there is also a higher proportion reporting a negative impact, with verbatims noting a lack of training, data silos and the burden of change carried by staff.

SIGNAL VIEW

- Although some organisations are beginning to see positive results, it is clear that a new CRM is not a silver bullet when it comes to delivering better communications.
- Regardless of which system and tools are used, it is critical that teams resolve issues around broader foundational capability (data, insight, operating model, journey & experience design etc.).
- With so many charities now having experience of implementation (good and bad), it's crucial that teams learn from sector peers to ensure they adopt best practice and avoid costly and time-consuming pitfalls.

What impact is the new CRM system having on your team?



As it's cloud based, the FR team can access the CRM at events and at fundraisers. It gives us access to supporters' data at events which is useful for effective on the day stewardship.

Able to automate certain tasks to free up staff time.

Dashboard are key to each area of fundraising. This is proving very helpful.

All information is held centrally so the full team can access transparent reporting.



Lack of training for all staff, key things like relationships and business rules being worked through still. Lack of clarity on consent etc.

Data is not shared across teams. The process is clunky and there is no guidance, so there's no uniformity of data use.

There have been some teething problems and we are getting there. Overall, it will be beneficial but in terms of staff time and capacity it has been a huge undertaking to change systems.



Q9e. Now thinking about the impact on your team. Is the new system having...

Base: All who have adopted a new CRM system in the last 2 years (22)

Q9f. We'd love to hear more about the impact the new system is having on team experience...

Base: All who have adopted a new CRM system in the last 2 years and having a positive or negative impact (13)

Summary

The research reflects a sector that is struggling to bring about the capability change required to deliver better experiences for supporters.

This change is being championed by senior management teams in just over half of the organisations surveyed, a figure which is arguably fairly low considering the growing emphasis we've seen over the last few years on Supporter Experience.

But even amongst this half, senior support does not appear to be translating into the practical changes needed to improve capability on the ground. Very few organisations have implemented many of the changes that are foundational to delivering better data-driven experiences.

Unsurprisingly, the greatest area of focus for most is cost reduction, with a supplier and format review on the agenda for many organisations. But once ink on paper elements have been shaved to the bone, teams will have to look elsewhere for savings.

Reviewing internal capability looks to be a relatively untapped opportunity. Focusing on the operating model, process and skills required to work in a truly supporter-led way brings with it the opportunity for significant overhead reduction with the valuable bonus of easing the burden on beleaguered teams.

Despite a reported focus on reducing environmental impact of Direct Mail, organisations who do have objectives relating to this (and many do not) are mostly not committing to external standards, or specific reduction targets, making meaningful progress unlikely.

Data is presenting a major challenge. A lack of insight and delays to campaign data are widespread issues, exacerbated in some cases by the implementation of new technology. Many organisations are funding major technology investment in the form of a new CRM. But this investment will not result in better experiences if resource is not carved out to put proper effort into understanding supporter comms requirements and factoring those into implementation planning. With mixed results across the sector, organisations must ensure they tap into the learnings of early adopters and avoid making the same mistakes of those that have gone before.

Measurement also remains problematic, with very few organisations having a clear way to measure the impact of improvements in the Supporter Experience. Being able to do this more effectively across the sector would help build a shared evidence base and unlock more funding to invest in experience improvement.

Overall the fact that just a quarter of organisations say that their Direct Mail capability enables them to deliver on their Supporter Experience ambition feels fairly unsatisfactory. So, what should charities be doing to close this gap?

Where next?

With a clear vision, good planning and effective cross-functional working charities can begin to close the gap between current capability and Supporter Experience aspiration.

To do this effectively, there must be a vision, an idea of where you'd like to get to and the kind of experiences you'd like to be able to deliver. And this must be championed at a senior level to create focus from all the necessary teams.

It's essential to bring together colleagues from data, technology and fundraising, to carry out a thorough review of current capability to understand the gap between where you are today and your aspiration.

Once you've identified the gap, reviewed major blockers and sized the effort for the various initiatives or projects required, you have what you need to create a Direct Mail roadmap to begin resolving these and moving closer to your vision.

Using a real, priority journey and reimagining how that could be for your supporters is the best way to review capability in a real context and show budget-holders what good could look like.

Having a clear vision and open dialogue with those responsible for operations and in particular any new systems implementation, will ensure that wider organisational capability development is aligned with Supporter Experience requirements in mind.



APPENDIX

Research methodology

Charities were invited by Signal and The Chartered Institute of Fundraising to participate in an online survey that was hosted by 2CV.

Fieldwork took place in March and April 2024 and 76 surveys were completed by respondents in a fundraising, communications or data/technology role working within the UK third sector. Interviews lasted seven minutes on average.





[Signal]

Signal is a comms transformation partner. We specialise in helping organisations bring together people, process and technology to create a better Supporter Experience. For more than 20 years we've been a committed partner to the sector, helping charities use data and technology to deliver more relevant and impactful supporter communications.

SIGNAL.CO.UK

[2CV]

2CV is an award-winning global insight agency. For over 30 years it has specialised in working with technology, entertainment, lifestyle, finance, and social brands and organisations. Its mission is simple: to help our clients identify opportunities, understand how best to capture them, and use them to make a positive commercial mark.

2CV.COM

If you'd like some expert advice about improving Supporter Experience in your organisation, please don't hesitate to get in touch.

CONTACT: Emily Gore | emily.gore@signal.co.uk

[A PARTNER IN DTAG]