

# Brand Research

## Successful Research for Fundraising

Presented by Surale Phillips, of:



# Who is DRM™?



Surale Phillips  
Research



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Messaging



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# About Surale Phillips

Surale Phillips has helped nonprofits to thrive and grow for more than two decades. By providing affordable, expert research and training she provides nonprofits with the knowledge and tools they need to make informed decisions.

She's served more than 100 clients throughout South Florida and the U.S. with donor research, constituent research, program evaluation, and market studies.

Surale also works with strategic partners such as Achieve, Sharp11, Sweet Boo Design, and The Mosaic Group.

## Sample of local and regional clients:

Nonprofits First, YWCA of South Florida, Cultural Council for Palm Beach County, Broward College, United Arts of Central Florida, City of West Palm Beach, SouthArts, Norton Museum of Art, the Kravis Center, Palm Beach Dramaworks, Collier County, Bayshore CRA, Florida Division of Cultural Affairs, St. John's Cultural Council, Fort Lauderdale CRA

## Sample of other clients include:

The states of Maine, Montana, and Tennessee, – Cities of Chandler (AZ), Raleigh (NC), Philadelphia (PA), and Alexandria (VA) – ArtsMemphis, UCLA, Mid Atlantic Arts Foundation, Moore College of Art & Design

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You are  
what they think  
you are.

# Where do you begin?

The background features a soft-focus image of white clouds against a light blue sky. Overlaid on this are three broad, diagonal stripes in muted colors: a teal stripe on the left, a lime green stripe in the center, and a pale blue stripe on the right. The stripes run from the bottom-left towards the top-right.

# Six Steps to Your Research

# The Big Six

- Set clear objectives
- Design your process
- Create Questions
- Collect Data
- Analyze Results
- Use what you learned

The background of the slide features a soft-focus image of white clouds against a light blue sky. Overlaid on this are three broad, diagonal stripes in muted colors: a teal stripe on the left, a yellow-green stripe in the middle, and a light blue stripe on the right. The text is centered over the yellow-green stripe.

What kind of data  
do I need?



# Data Types

## 4

- Knowledge
- Opinion
- Behavior
- Attributes

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# Tips, Tricks, and Pitfalls

## Tips and Tricks

- Got to be trackable to person
- First X number get something
- Send a heads-up
- Pre-test on outsiders
- Make the intro about them too!
- Always include an open question

## Tips and Tricks

- Start with softballs
- Trigger positive emotions early
- Keep scales in the same order
- Always give instructions (e.g. check one.
- Put any demographics at the end

# Pitfalls for Questions

- Useless questions
- Leading questions
- Double questions
- Jargon
- Vagueness
- Overlaps
- Unrealistic expectations

## Tips and Tricks

- Keep question types simple and few
  - Choose one or all
  - Agreement statements
  - Scales and ratings (5 points)
  - Ranking (5 or less)
  - Open comment

# Your Fall Fundraising 3 Point Checklist

The background features three diagonal stripes of different colors: teal, yellow-green, and light blue-grey. These stripes are overlaid on a pattern of soft, white, fluffy clouds. The text 'Q & A' is centered in the middle of the image.

Q & A





Keep in touch.

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