



2019 Social Impact Partnership Sales Cycle Survey



Introduction To The 2019 Report

Over the past 5 years, For Momentum has conducted surveys of nonprofit cause and CSR partnership professionals to gather data about factors that influence social impact partnership sales cycles. Our goal in conducting this body of research is to gather data and benchmarking information to equip practitioners with data and insights that will foster improved planning and, ultimately, stronger cause alliances.

Our goals for this Social Impact Partnership Sales Cycle Research are to:

- Develop an industry-wide resource for nonprofit professionals to benchmark and set partnership sales cycle expectations with staff and volunteer leadership and other key stakeholders.
- Gather data from partnership sales experts to identify marketplace variables that influence their ability to secure commitments.
- Procure data to deepen the understanding of the range of factors affecting partnerships with corporations at the different stages of the development cycle.
- Compare historical data from past surveys to gain a better understanding of changes and trends, and help practitioners understand and plan for the factors influencing partnership decisions.

In the following pages, you will find data to bolster partnership strategies including vital factors that impact sales timelines, prospect strength, decision-maker insights, variables that positively and negatively influence close rates and more!



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Data Secured

Variables Influencing Social Impact Close Rates and Sales Cycles:

- Type of Partnership Commitment
 - Sponsorship/Unrestricted
 - Programmatic
 - Integrated Partnership
 - Employee Engagement
- Size of Commitment
- Standardization vs. Customization
- Length of Commitment Requested
- Strength of Relationship
 - Renewals
 - Inbound
 - Cold
- Length of Commitment Requested



Executive Summary

This report is filled with important data to help the sales practitioner. Here we have highlighted the top 5 Key Takeaways to set your team up for Social Impact Partnership selling success.



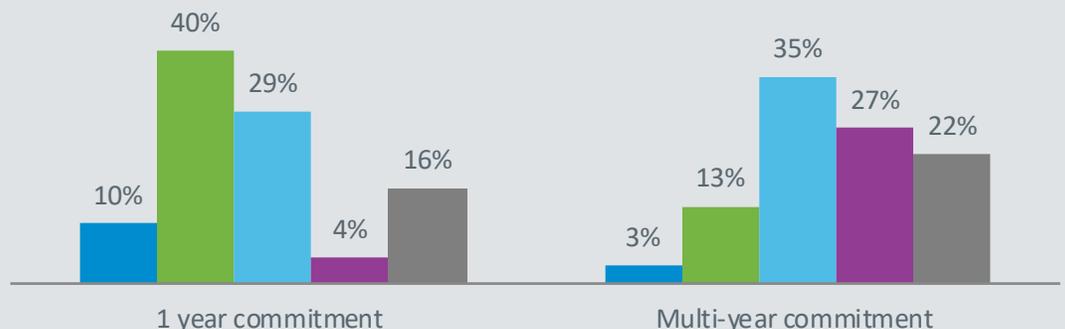
1

Give It Time

A short selling season will not set you up for success. The partnership sales process is long and takes time. Typically, the more complex the partnership, the longer the close. For example, **the majority of multi-year integrated partnerships require one year or more of discussions to close.**



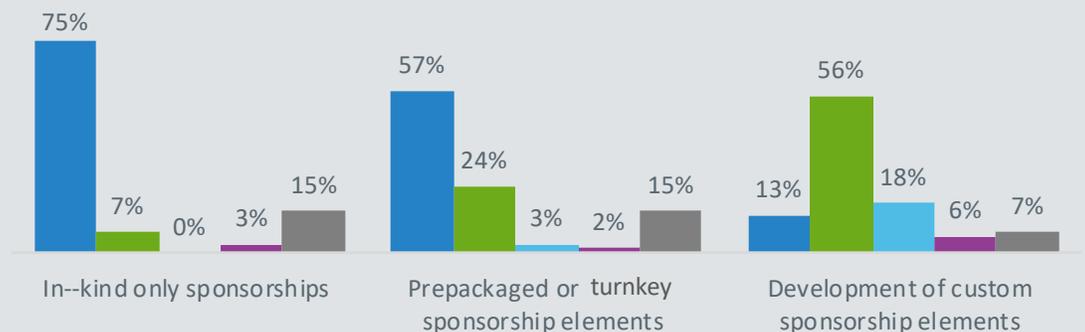
Want to close a deal quickly? Don't underestimate the value of strategic in-kind and awareness building partnerships.



75% OF

RESPONDENTS REPORT IN-KIND GIFTS CLOSE IN LESS THAN 6 MONTHS

Prepackaged benefits can speed the sales cycle. Prepare compelling options and **80+% of the time you can close a deal within a year.**



66% OF

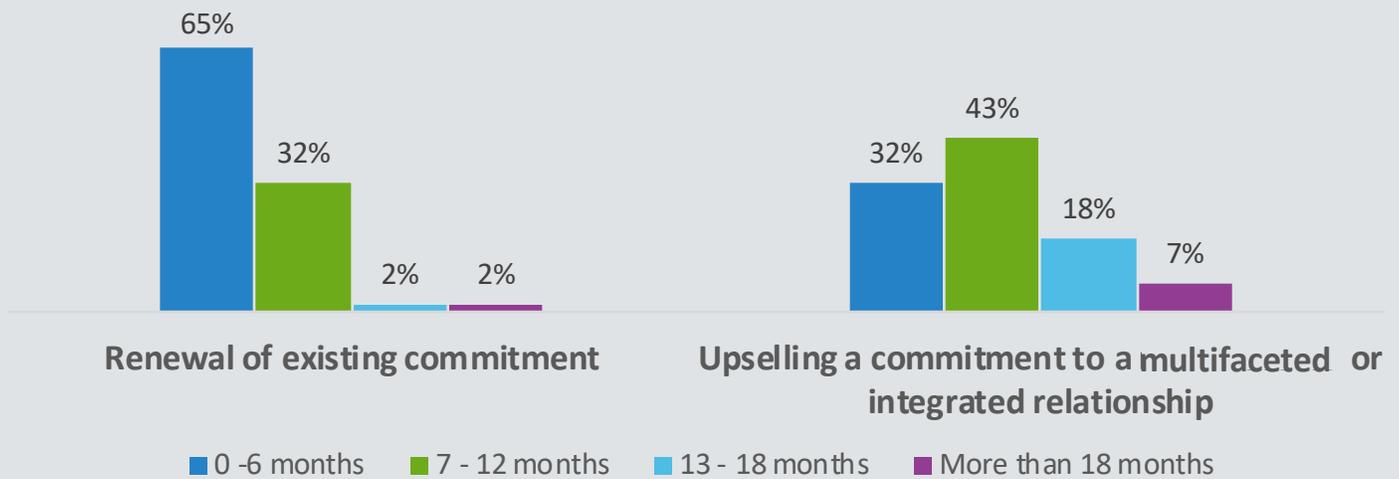
RESPONDENTS INDICATED THAT AWARENESS ACTIVITIES WITH NO FINANCIAL COMMITMENT CLOSE IN LESS THAN 6 MONTHS

■ 0 - 6 months ■ 7 - 12 months ■ 13 - 18 months ■ More than 18 months ■ Not Applicable



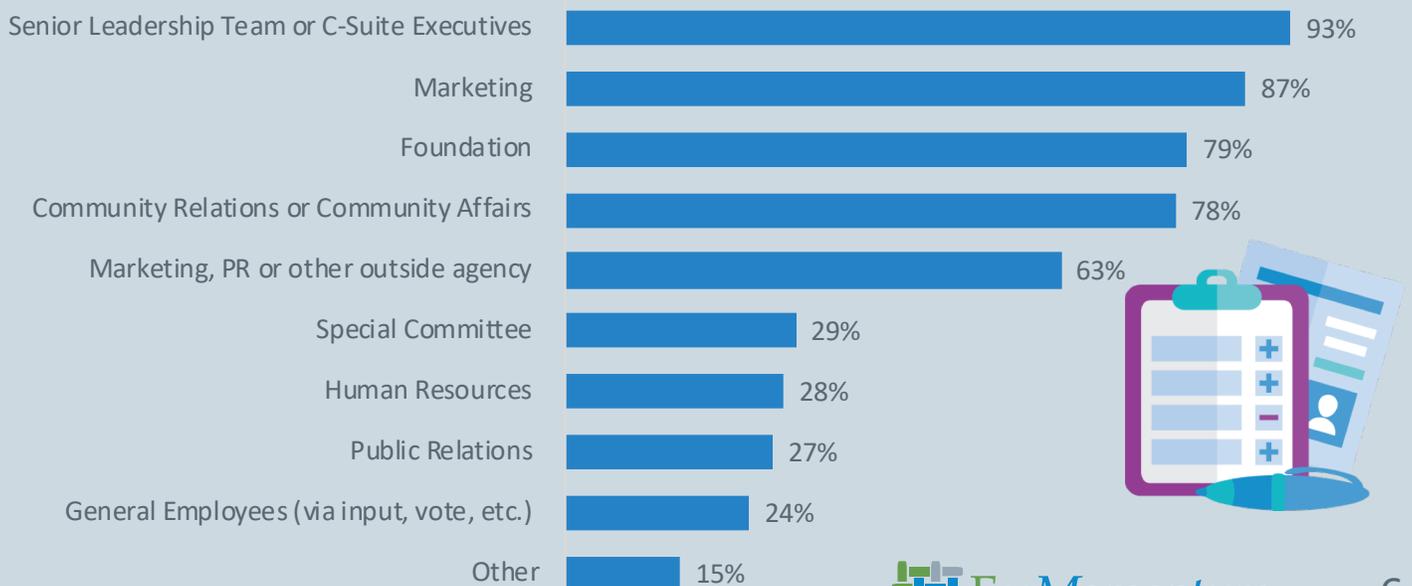
2 Relationship Building

Need dollars in the door fast? Don't overlook your current partners. **Your existing partners may be the best candidates for new campaigns or opportunities**, and our research shows they are likely to say yes much faster than new relationships.



Target a Range of Decision-Makers

There are multiple decision-makers in a company. Be sure to integrate multiple activations to appeal to this broad range of corporate decision-makers.





Balanced Approach

When planning your partnership strategy be sure to focus on your partner’s needs, as well as your own, for optimal success. Invest the time needed to steward the partnership and bring fresh ideas.

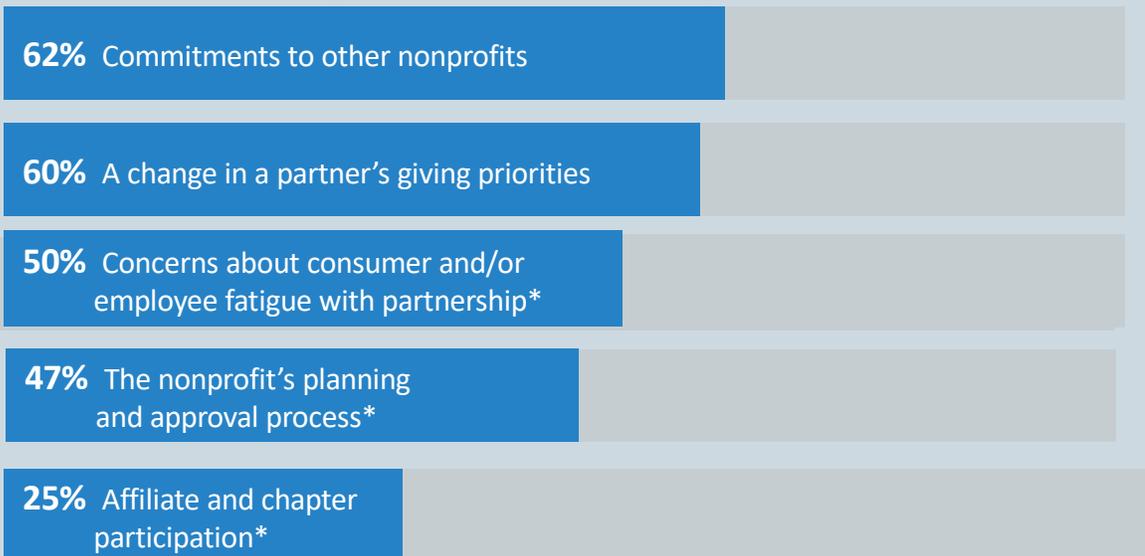
#1

The number one factor that enhances a nonprofit’s ability to secure a partner is an understanding of the partner’s needs.

Top 5 Factors that Positively Impact the Ability to Secure a Corporate Partnership



Top 5 Factors that Negatively Impact the Ability to Secure a Corporate Partnership



*Be sure to avoid these potential partnership deal breakers – fresh ideas and strong stewardship are key!





Pricing & Value

The perceived value of benefits can positively or negatively impact partnership success. Be sure to work with your partner to understand their perspective.

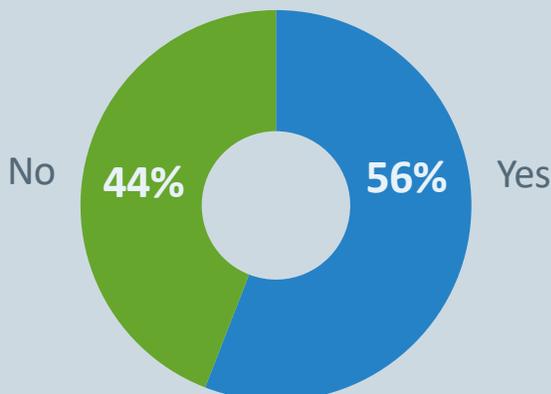
SINGLE MOST NEGATIVE FACTOR

SINGLE MOST POSITIVE FACTOR

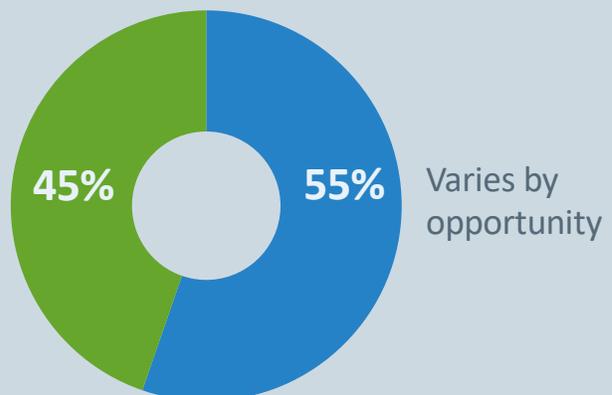


56% of nonprofits interviewed indicated they require a guaranteed minimum for a corporate partnership. Among those, 55% indicate that the minimum guaranteed amount varies by opportunity.

Organization require guaranteed minimum for corporate partnership?



What is the guaranteed minimum for corporate partnership?





Partnership Types

Included in this report, is a detailed breakdown of vital factors that impact the time it takes to secure Sponsorship, Programmatic Funding, Integrated Partnership and Employee-Directed Partnership.

From an overarching point of view, these factors are consistent across all partnership types:

- ✓ The larger the ask, the longer the close.
- ✓ Turnkey elements are valuable and a smart strategy for speed, but factor more time to develop truly custom partnerships.
- ✓ Multi-year commitments are clearly a great strategy, but you must factor more time to secure this type of commitment.
- ✓ For the fastest commitment, focus on in-kind and awareness-oriented partnerships. These can be an excellent beginning to a future, long-term, robust partnership.

Be sure to take these factors into account during your strategic planning process.

Objectives and Methodology

- Our goal in conducting this research is to gather data and benchmarking information to equip cause and CSR practitioners with planning information and insights that will foster improved strategic planning and, ultimately, stronger cause alliances with corporations.
- Data was collected via an online survey conducted by Lab 42 in March, 2019.
- Survey respondents included 68 professionals with collective experience at over 100 top nonprofit organizations in America.

Organizations Participating

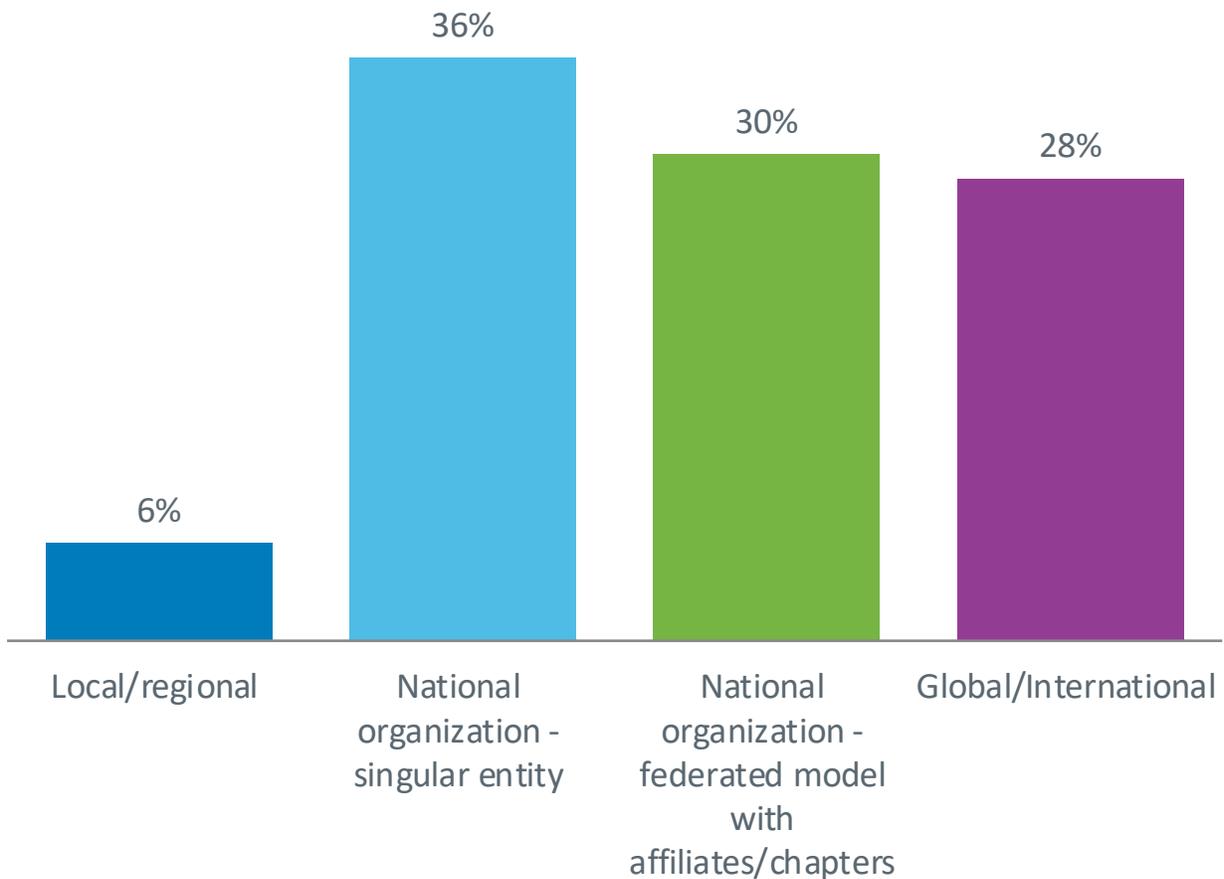


Respondents Bring Experience From



RESPONDENT SUMMARY BY TYPE OF ORG

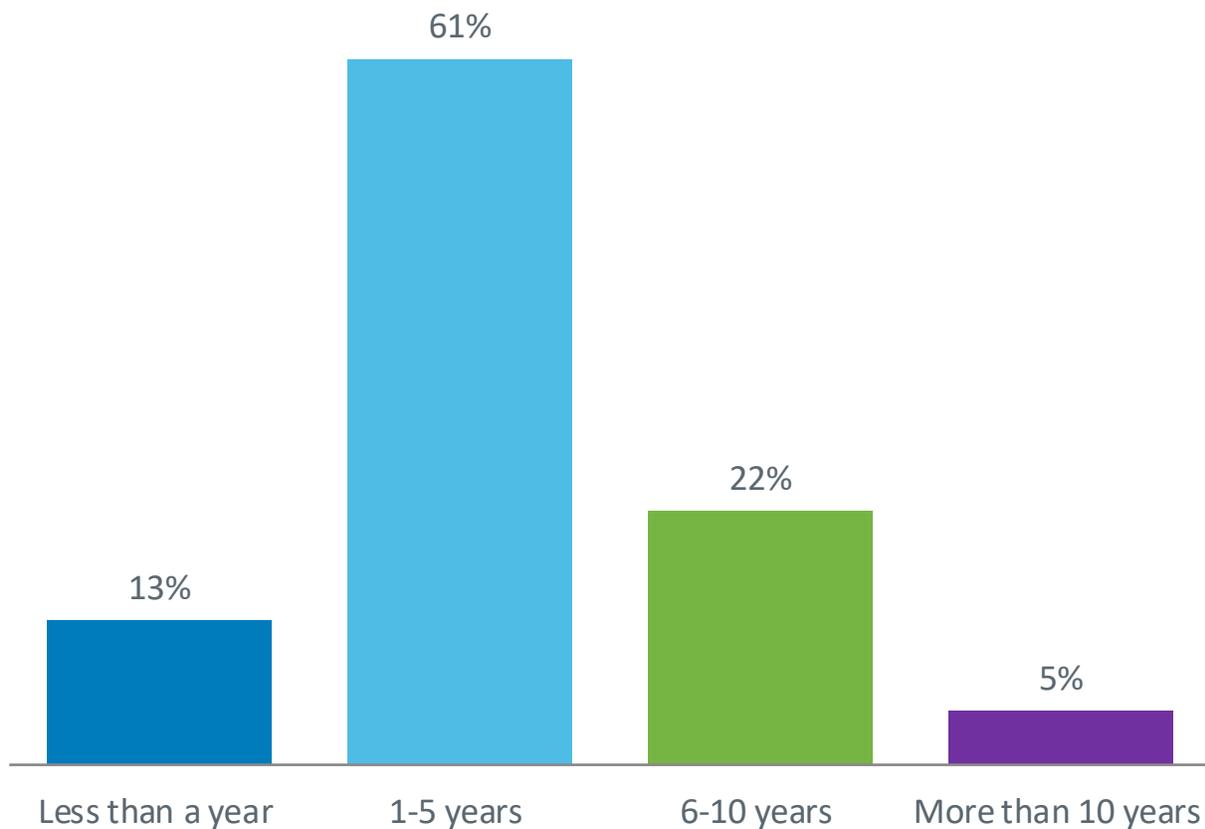
Organization Type



Survey respondents represented a balanced mix of nonprofit organization structures.

RESPONDENT SUMMARY BY LENGTH IN ROLE

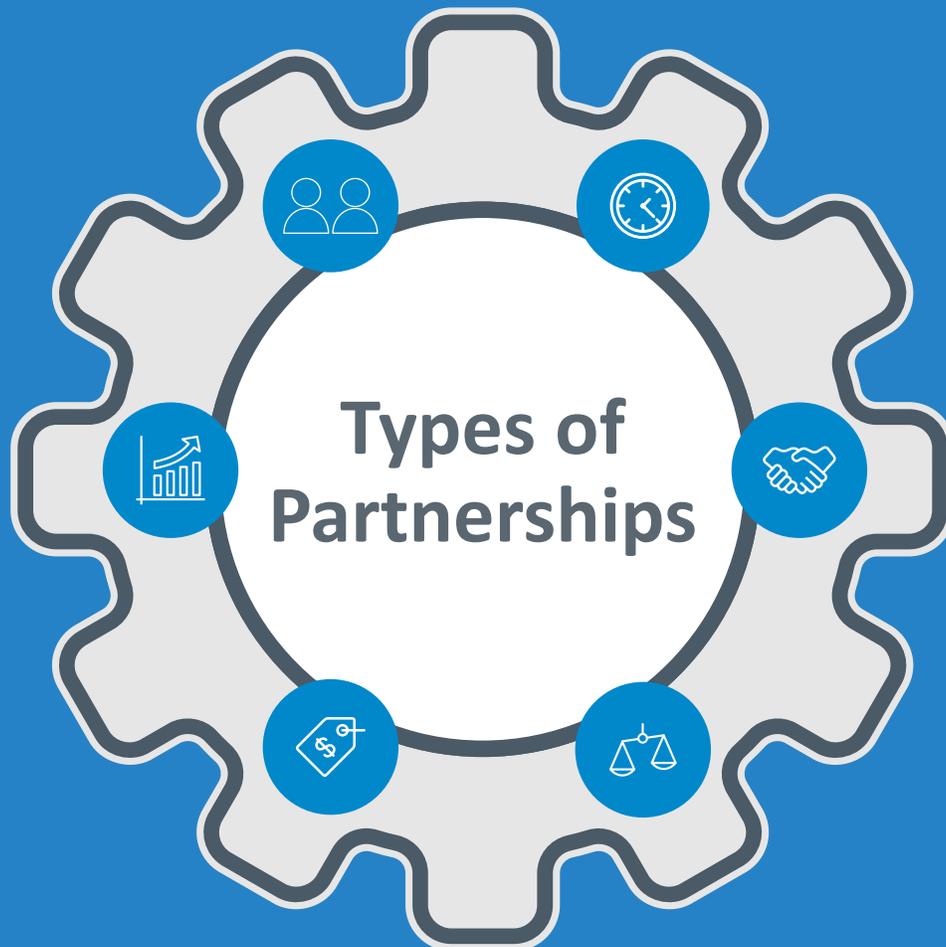
Length in Current Role



The majority of Survey respondents have been in their current position for 1-5 years.

It is important to also note that the majority of respondents listed previous nonprofit employment experience at 2-3 previous nonprofit organizations.

Over 1/3 of respondents have worked at 5 or more nonprofit organizations.





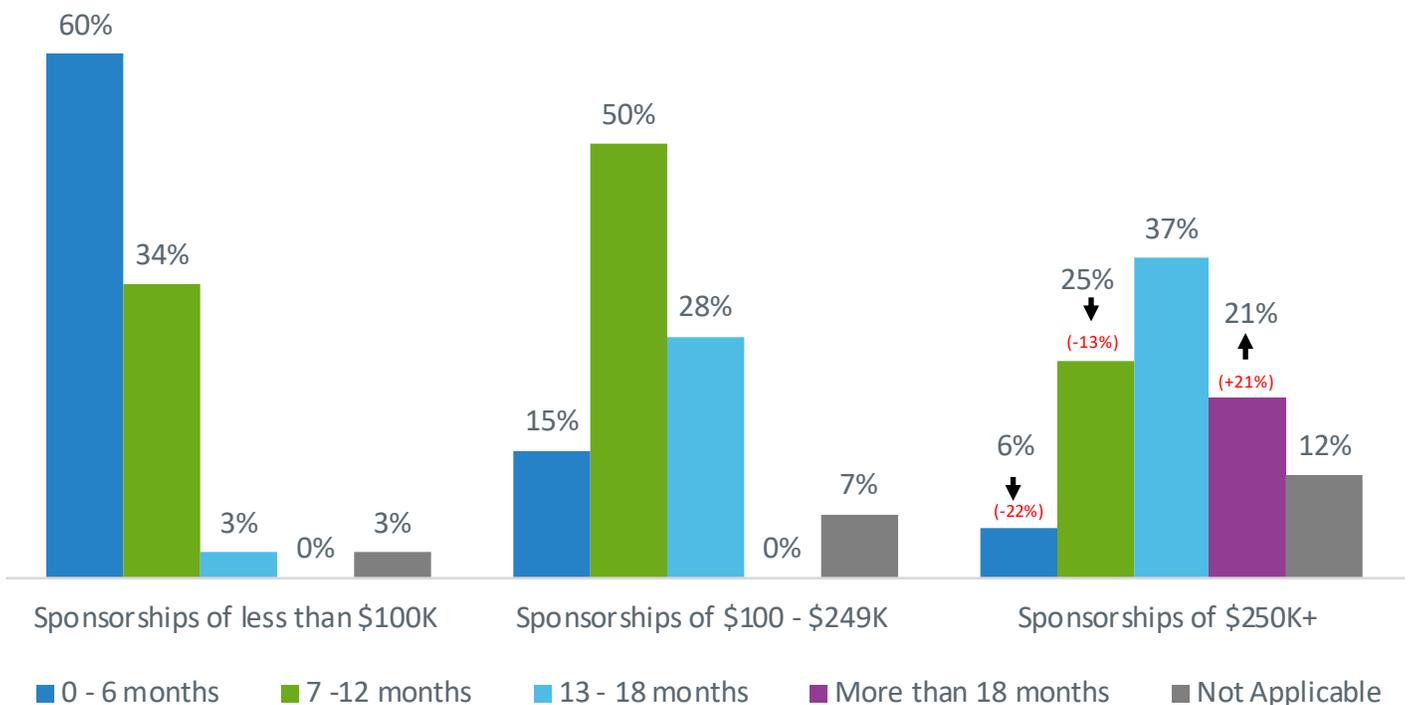
Types of Partnerships Studied

We gathered data on factors that influence the sales cycle for four types of strategic alliances:

- **Sponsorship:** Unrestricted funding -- a primarily cash funder or in-kind contributor for an event, specified campaign or activity.
- **Programmatic Funding:** Restricted funds or a corporate grant used to fund a specific program, research project, a specified campaign or mission goal.
- **Integrated partnership:** A two-way relationship where both the nonprofit and the corporate partner leverage shared assets and activate the partnership to raise awareness and/or funds from a variety of constituents such as consumers.
- **Employee-directed partnership:** A relationship where the corporate partner activates its employee base to raise awareness and funds by encouraging workplace activities, creating team or P2P fundraising efforts, engaging employees to volunteer to support its cause, employee giving, matching grants and skilled volunteerism.

SPONSORSHIP (UNRESTRICTED FUNDING)

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - PRICING



2019 Base=68 Nonprofit Partnership Sales Experts
2016 Base=50 Nonprofit Partnership Sales Experts

↑↓ (+/-x%)= Significance difference at 95% vs. 2016 *Use caution when making direct comparisons between 2016 and 2019 as in 2019 we added "Not Applicable" option

Q1: For each of the following sponsorship levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation?

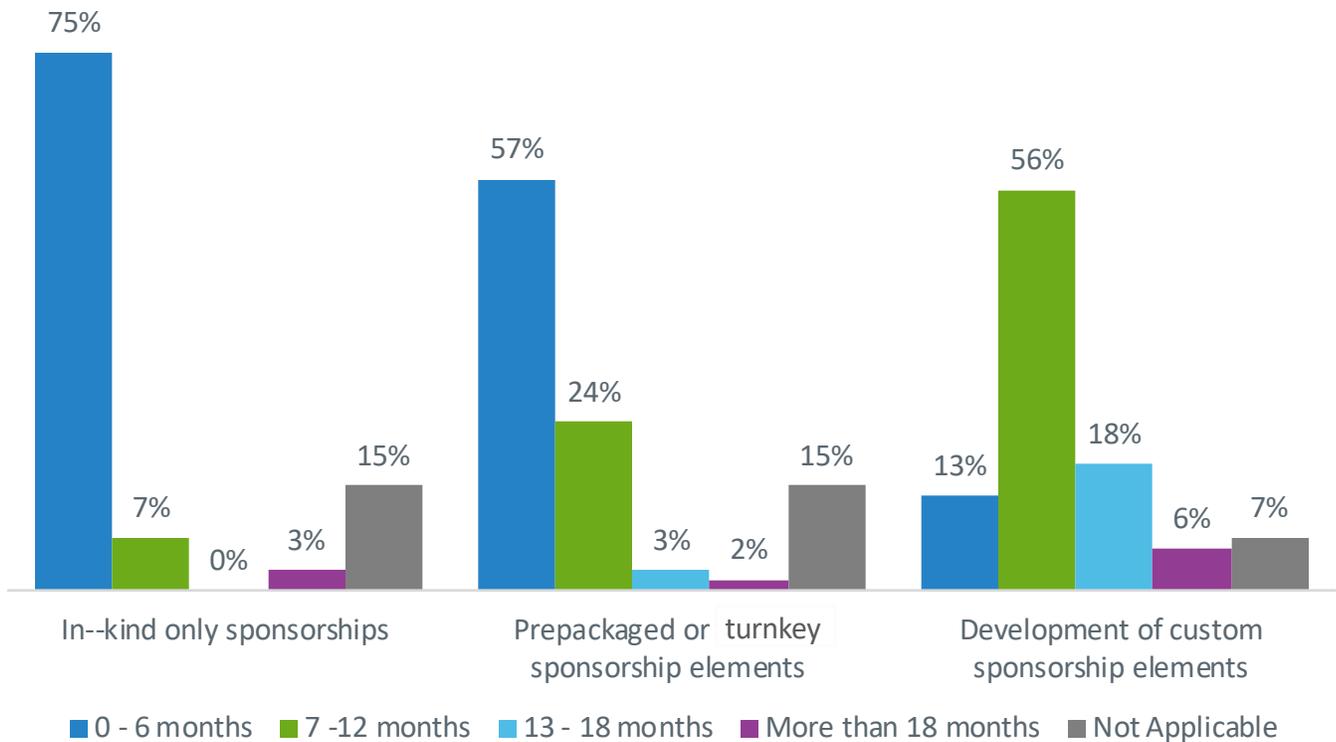
The larger the sponsorship ask, the more time is needed for negotiations.

To achieve quick funding goals, focus on smaller asks. 94% of \$100K or less sponsorships can be secured in a year or less.

In comparison to 2016 data, we see shifts in Sponsorships of \$250K toward a longer negotiations cycle.

SPONSORSHIP (UNRESTRICTED FUNDING)

Number Of Months It Takes To Secure A Commitment
After Having Initial Conversation - PARTNERSHIP ELEMENTS



Q1: For each of the following sponsorship levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation?

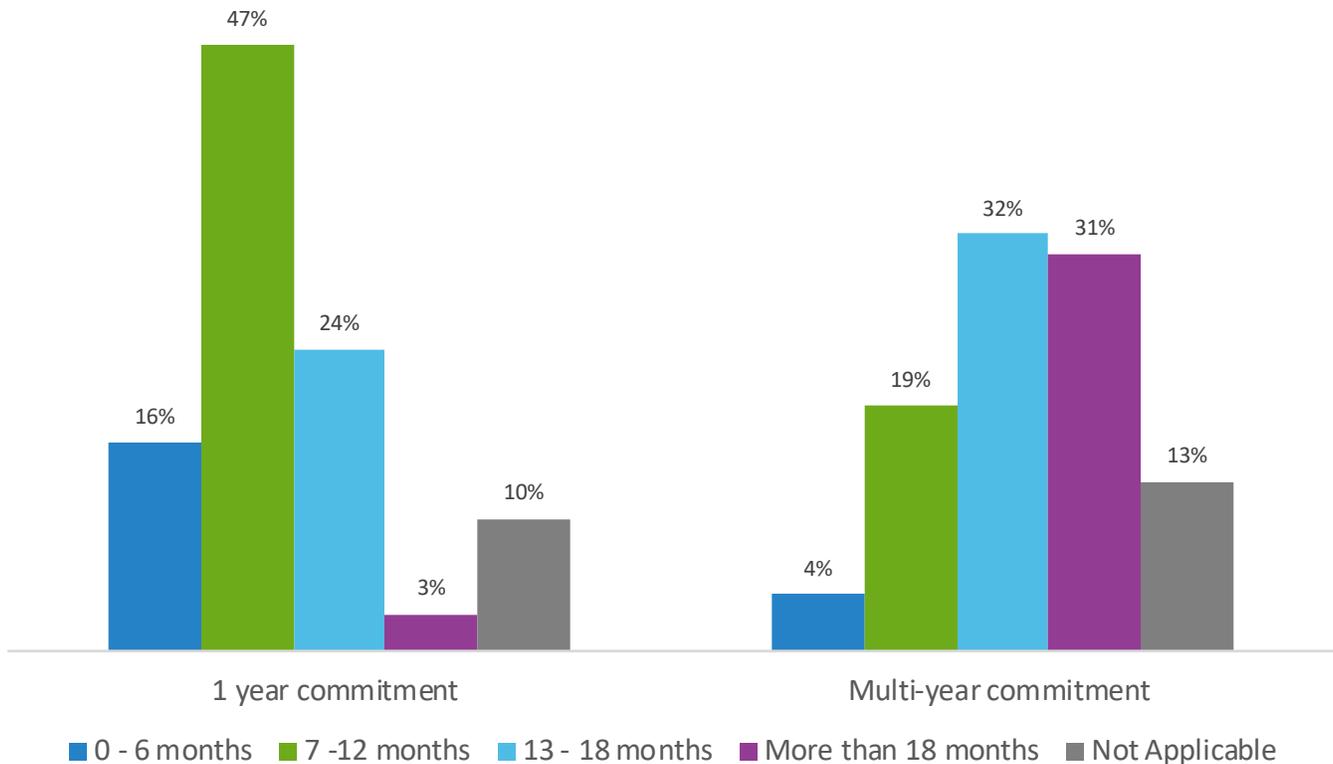
For quick commitments, focus on in-kind asks. This can be an excellent partnership starting point.

Prepackaged benefits can speed the sales cycle. Prepare some compelling options and 80+ % of the time, you can close the deal within a year.

Custom partnerships are highly valuable. When planning, allow for longer negotiations time frames.

SPONSORSHIP (UNRESTRICTED FUNDING)

Number Of Months It Takes To Secure A Commitment
After Having Initial Conversation – LENGTH



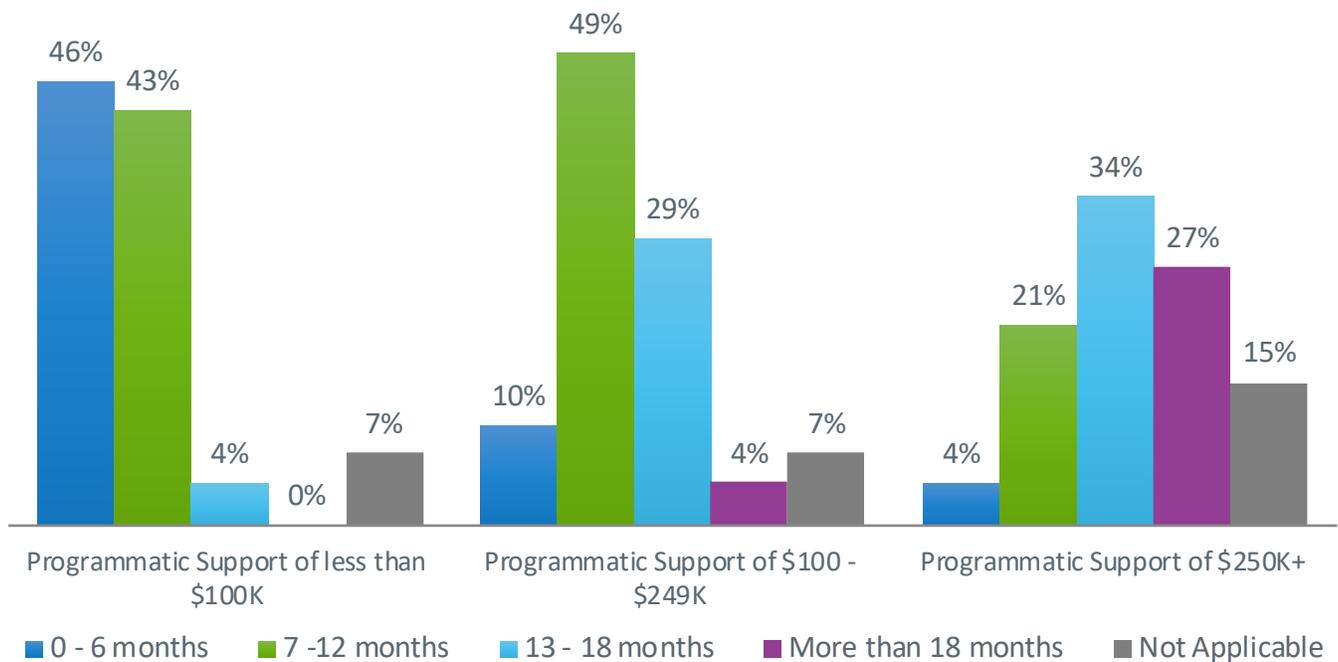
Q1: For each of the following sponsorship levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation?

For a faster sales cycle, focus on one year agreements.

Multi-year commitments are clearly of great value and a longer selling cycle should be anticipated.

PROGRAMMATIC SUPPORT (RESTRICTED FUNDING)

Number Of Months It Takes To Secure A Commitment
After Having Initial Conversation - PRICING



Q3: For each of the following support levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation?

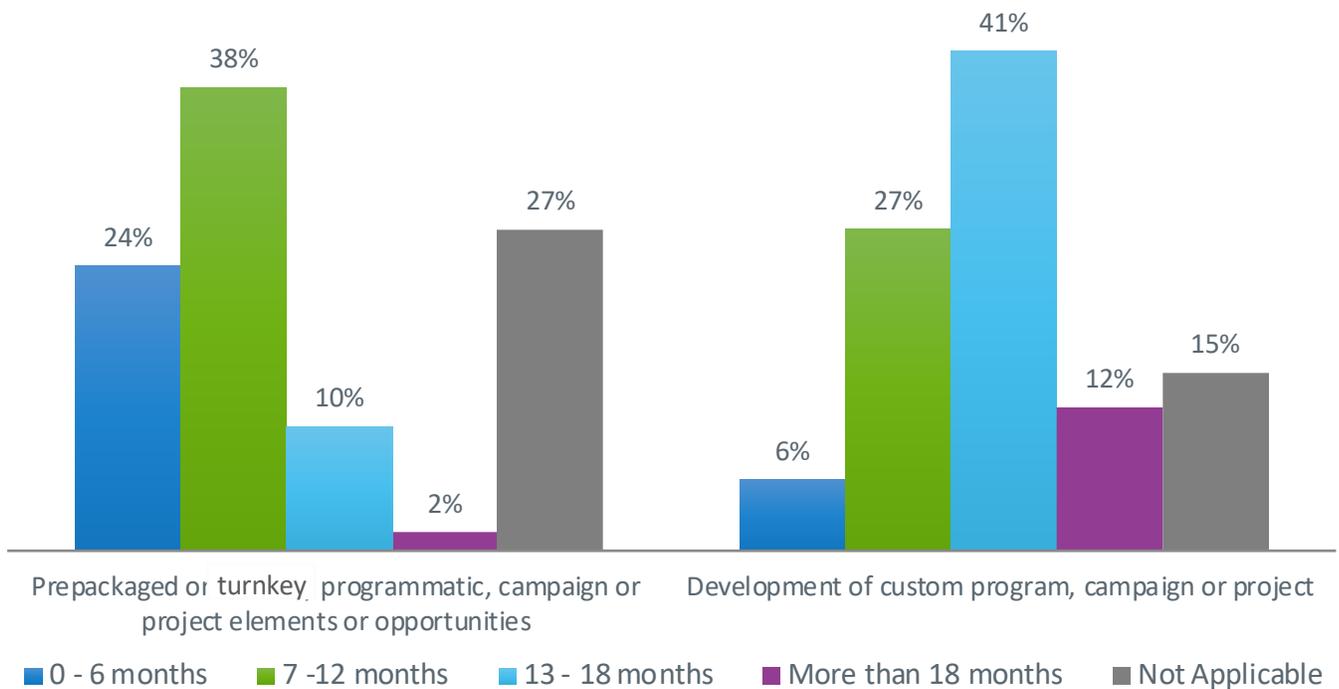
The larger the sponsorship ask, the more time is needed for negotiations.

To achieve quick funding goals, focus on smaller asks. 89% of \$100K or less programmatic asks can be secured in a year or less.

For funding of \$250K or more, 61% report a sales cycle of more than a year.

PROGRAMMATIC SUPPORT (RESTRICTED FUNDING)

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - PARTNERSHIP ELEMENTS



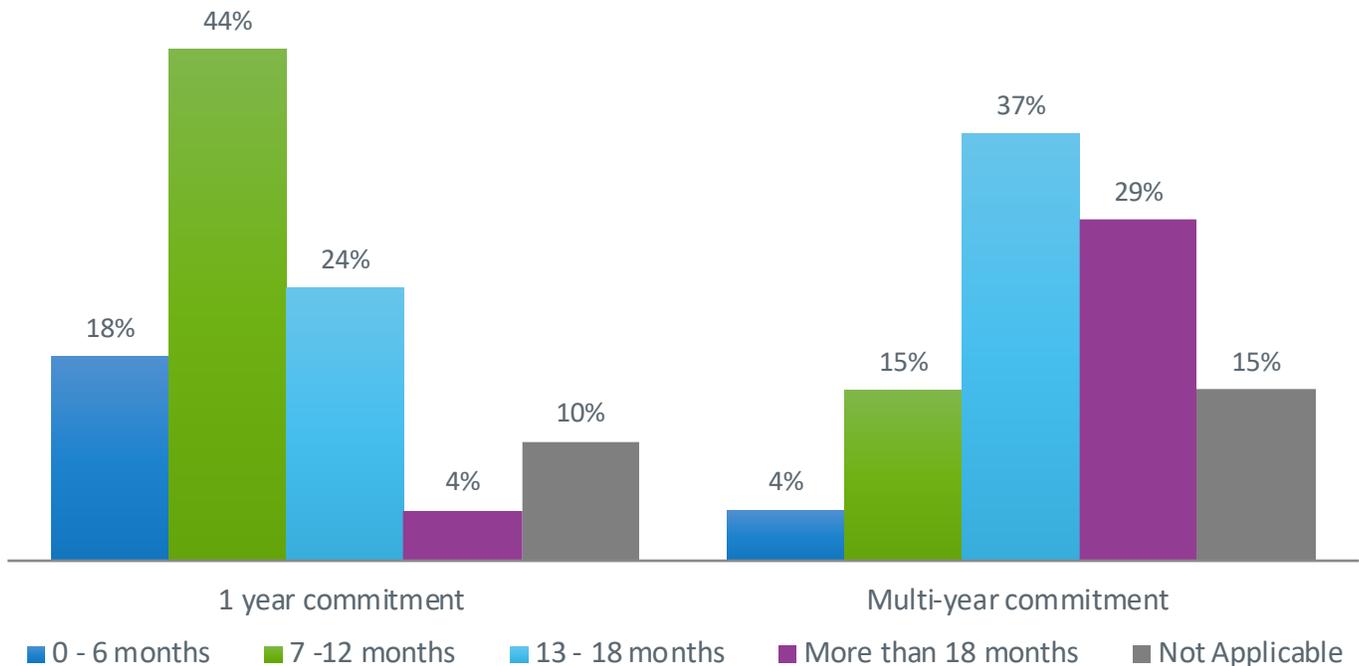
Q3: For each of the following support levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation?

Prepackaged benefits can speed the sales cycle. Prepare some compelling options and 60+ % of the time, you can close the deal within a year.

Custom partnerships are highly valuable. When planning, allow for longer negotiations timeframes.

PROGRAMMATIC SUPPORT (RESTRICTED FUNDING)

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - LENGTH



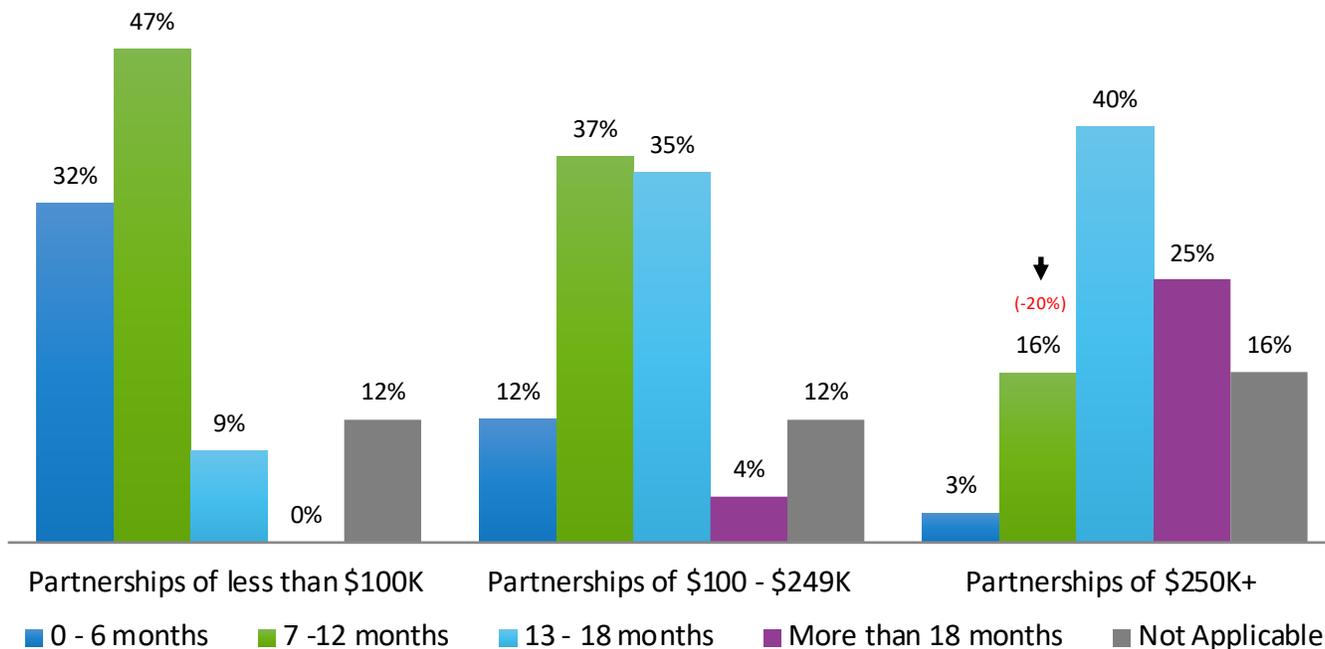
Q3: For each of the following support levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation?

For a faster sales cycle, focus on one year agreements.

Multi-year commitments are clearly of great value and a longer selling cycle should be anticipated.

INTEGRATED PARTNERSHIP

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - PRICING



2019 Base=68 Nonprofit Partnership Sales Experts
2016 Base=50 Nonprofit Partnership Sales Experts

↑↓ (+/-x%)= Significance difference at 95% vs. 2016 *Use caution when making direct comparisons between 2016 and 2019 as in 2019 we added "Not Applicable" option

Q5: For each of the following integrated partnership levels and types, on average, how many months does it take to secure a commitment once you have held an initial conversation?

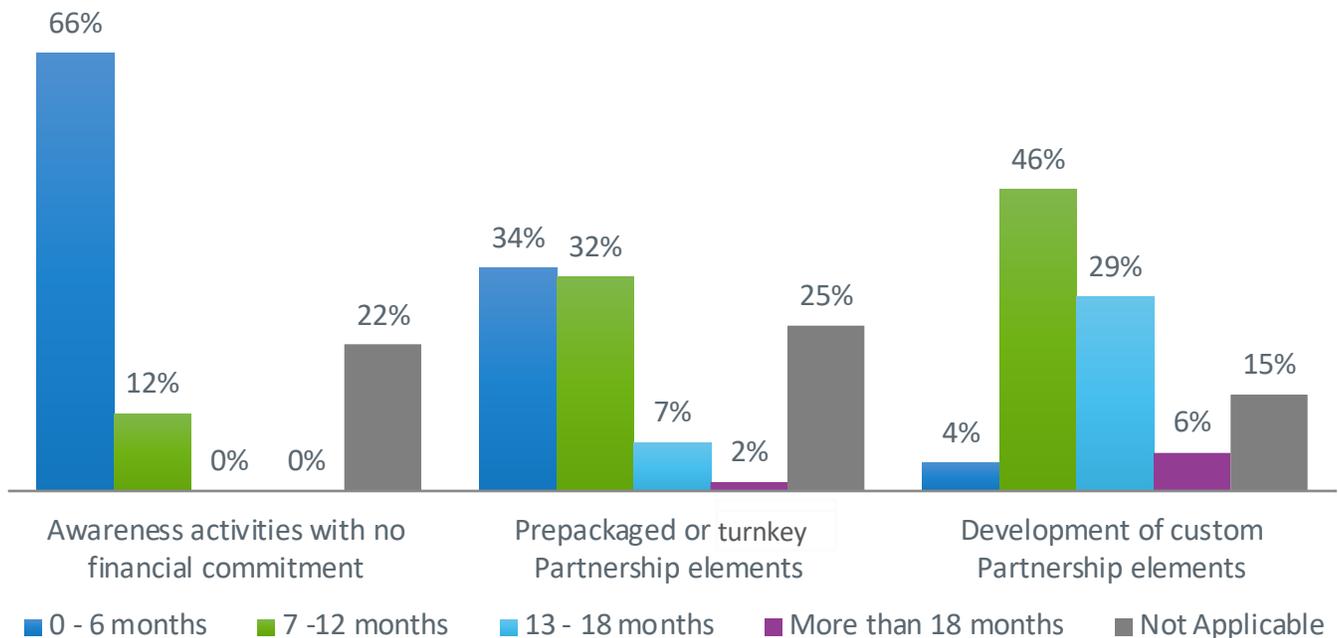
The larger the sponsorship ask, the more time is needed for negotiations.

To achieve quick funding goals, focus on smaller asks. 79% of \$100K or less sponsorships can be secured in a year or less. It is important to note that compared to sponsorship and programmatic funding, integrated partnerships take a longer time frame to close.

In comparison to 2016 data, we see shifts in Sponsorships of \$250K toward a longer negotiations cycle.

INTEGRATED PARTNERSHIP

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation – PARTNERSHIP ELEMENTS



Q5: For each of the following integrated partnership levels and types, on average, how many months does it take to secure a commitment once you have held an initial conversation?

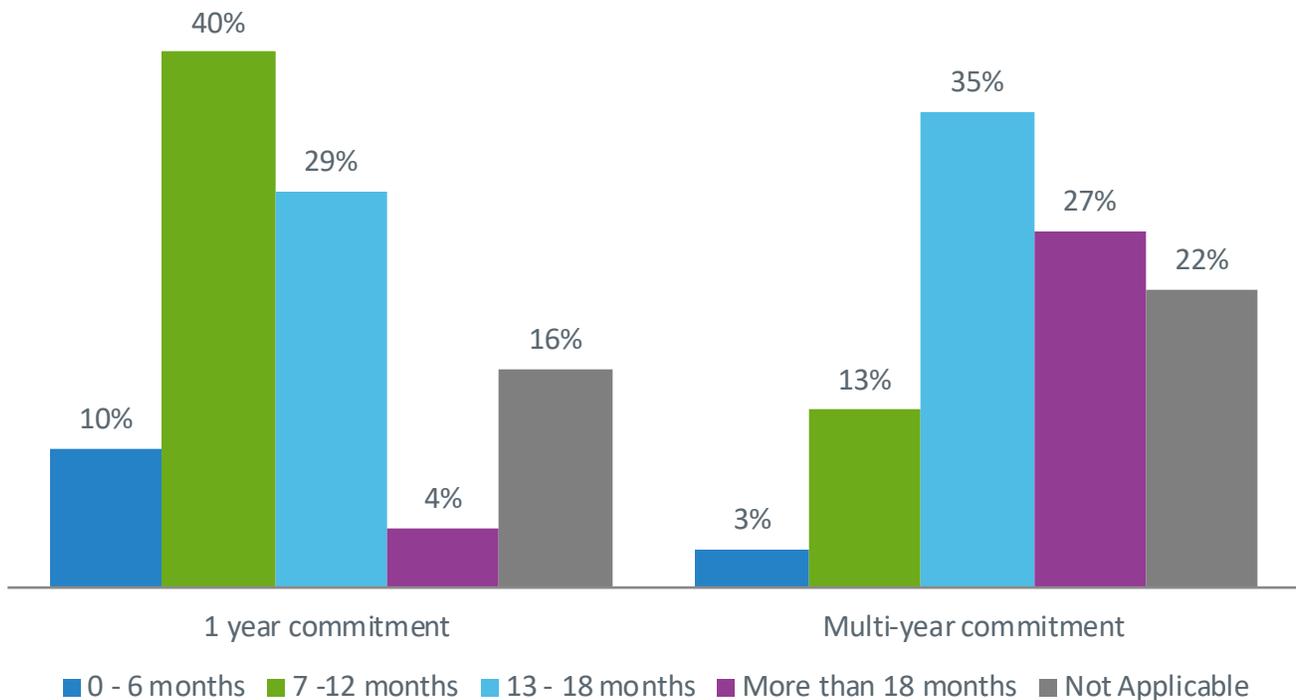
For quicker commitments, focus on awareness-generating partnerships with no financial commitments. This can be an excellent partnership starting point and most often closes within a year. These partnerships can amplify your message, yet nearly 1 in 4 nonprofits do not take advantage of these types of partnerships. Missed opportunity!

Prepackaged benefits can speed the sales cycle. Prepare some compelling options, and 66+ % of the time, you can close the deal within a year. Compared to sponsorship and programmatic support, prepackaged/turnkey elements within integrated partnerships take longer to close.

Custom partnerships are highly valuable. When planning allow for longer negotiation timeframes.

INTEGRATED PARTNERSHIP

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - LENGTH



Q5: For each of the following integrated partnership levels and types, on average, how many months does it take to secure a commitment once you have held an initial conversation?

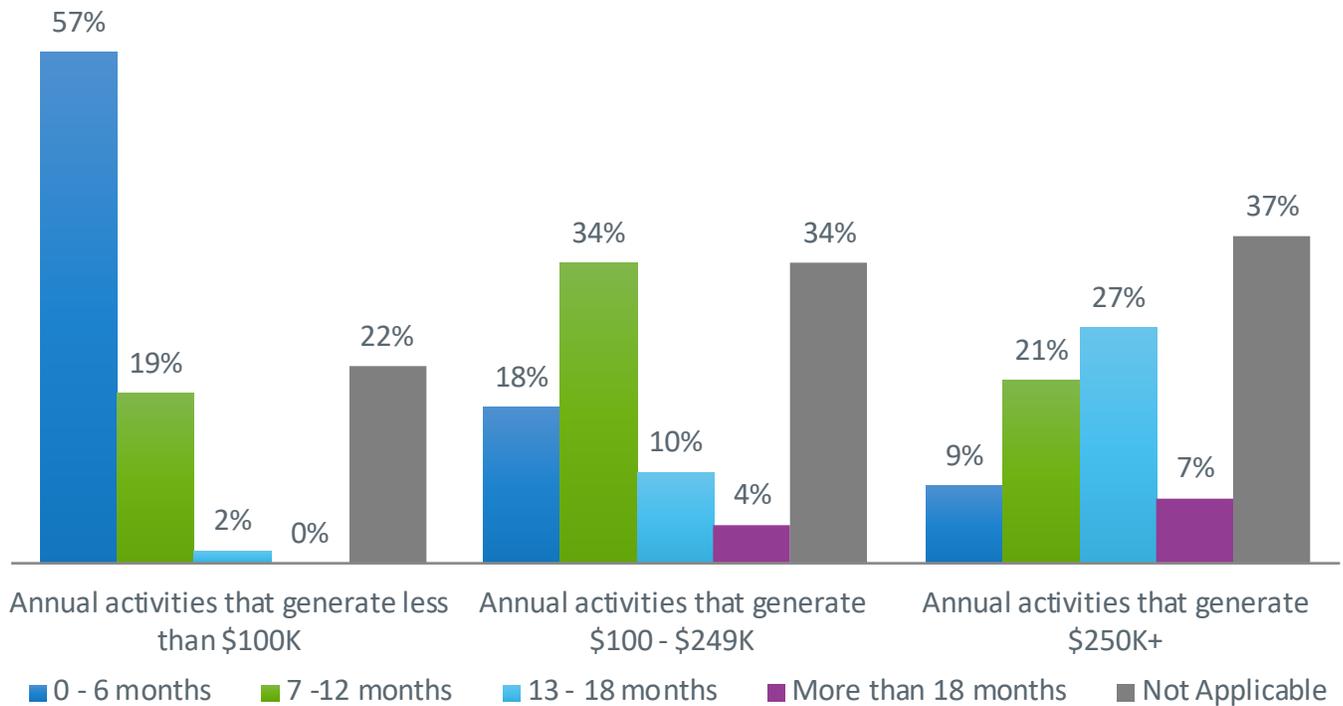
For a faster sales cycle, focus on one year agreements.

However, compared to sponsorship and programmatic support, integrated partnerships still take longer to close.

Multi-year commitments are clearly of great value and a longer selling cycle should be anticipated.

EMPLOYEE-DIRECTED PARTNERSHIP ACTIVITIES

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - PRICING



Q7: For each of the following employee-directed partnership activities, on average, how many months does it take to secure a commitment once you have held an initial conversation?

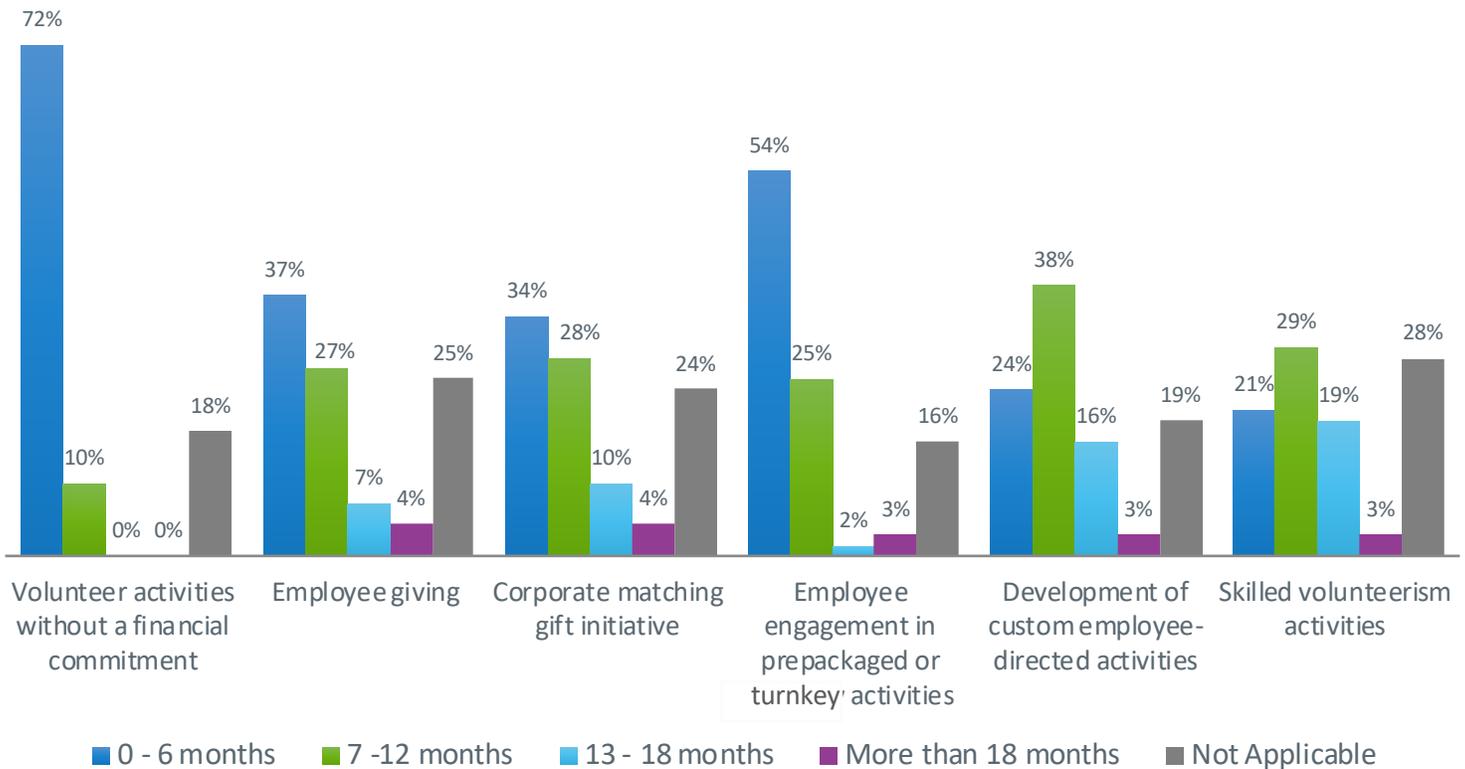
The larger the sponsorship ask, the more time is needed for negotiations.

To achieve quick funding goals, focus on smaller asks. 76% of \$100K or less sponsorships can be secured in a year or less.

It is important to note that compared to other types of partnerships studied, employee-directed partnerships take the shortest time to close. On the contrary multi-year commitments take the longest.

EMPLOYEE-DIRECTED PARTNERSHIP ACTIVITIES

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - TYPE



Q7: For each of the following employee-directed partnership activities, on average, how many months does it take to secure a commitment once you have held an initial conversation?

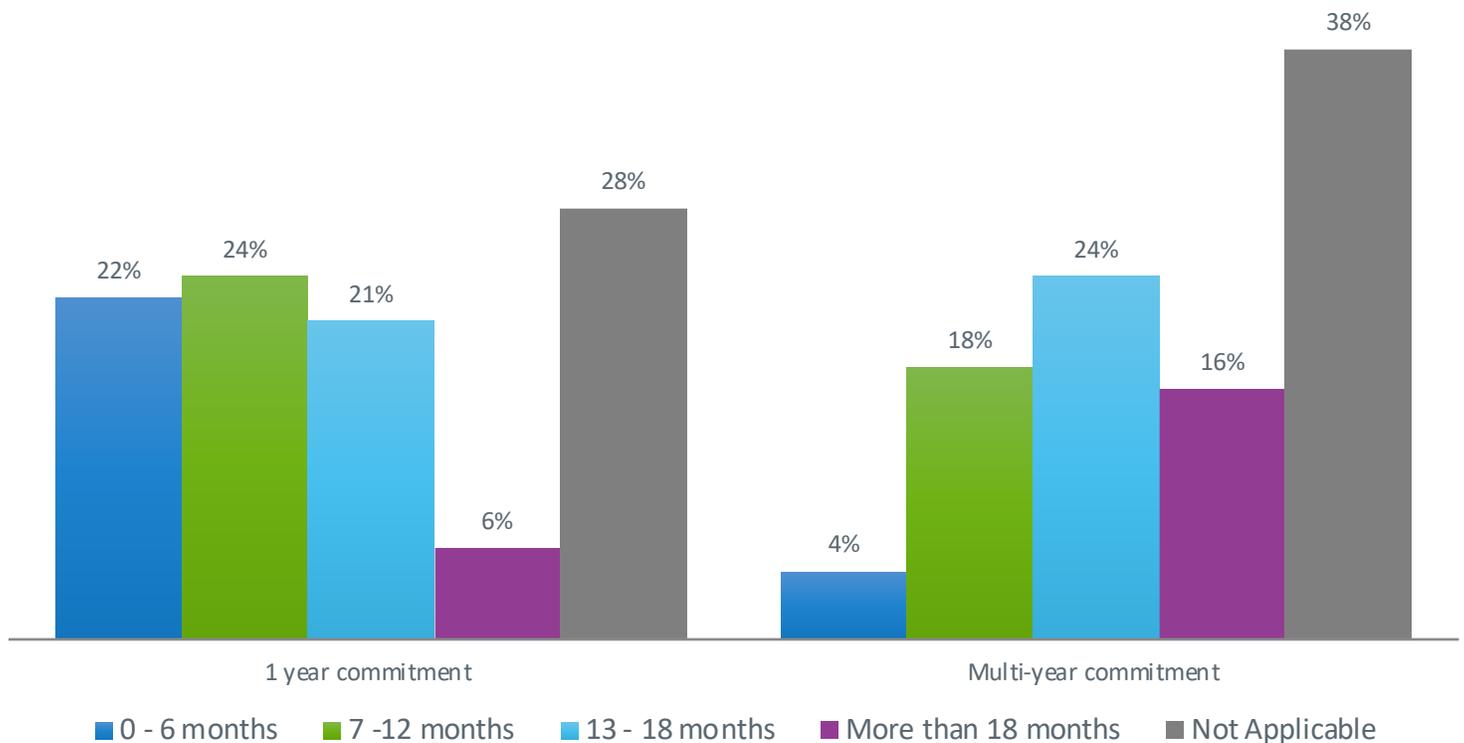
Given the increased interest in the employee audience, the survey gathered details on a wide range of employee activations. Be sure to factor these into your strategic planning process.

The fastest to close are volunteer activities with no financial commitment and employee engagement in prepackaged or turnkey activities.

Skilled volunteerism is on the rise and can be quite valuable but factor more time for this type of partnership.

EMPLOYEE-DIRECTED PARTNERSHIP ACTIVITIES

Number Of Months It Takes To Secure A Commitment After Having Initial Conversation - LENGTH



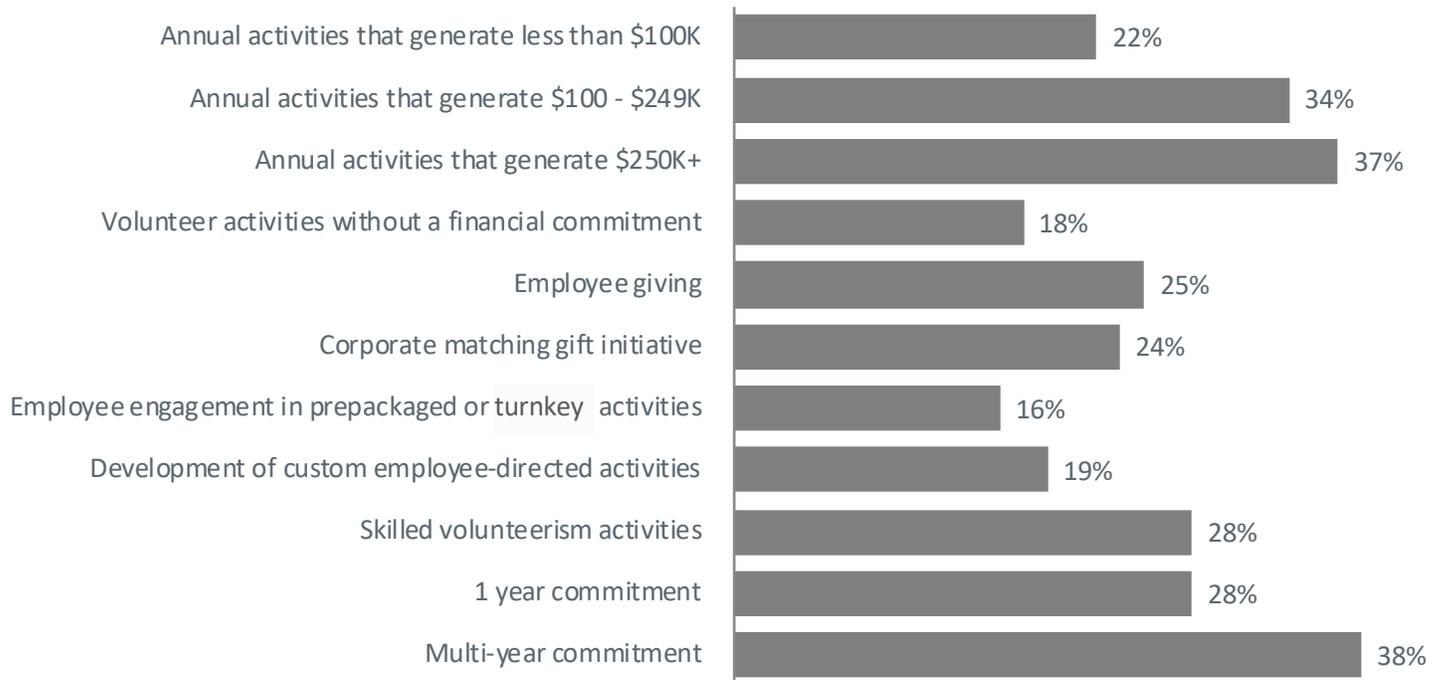
Q7: For each of the following employee-directed partnership activities, on average, how many months does it take to secure a commitment once you have held an initial conversation?

For a faster sales cycle, focus on one year agreements.

Multi-year Employee-Directed commitments are clearly of great value. A longer selling cycle should be anticipated, but, overall are harder to secure.

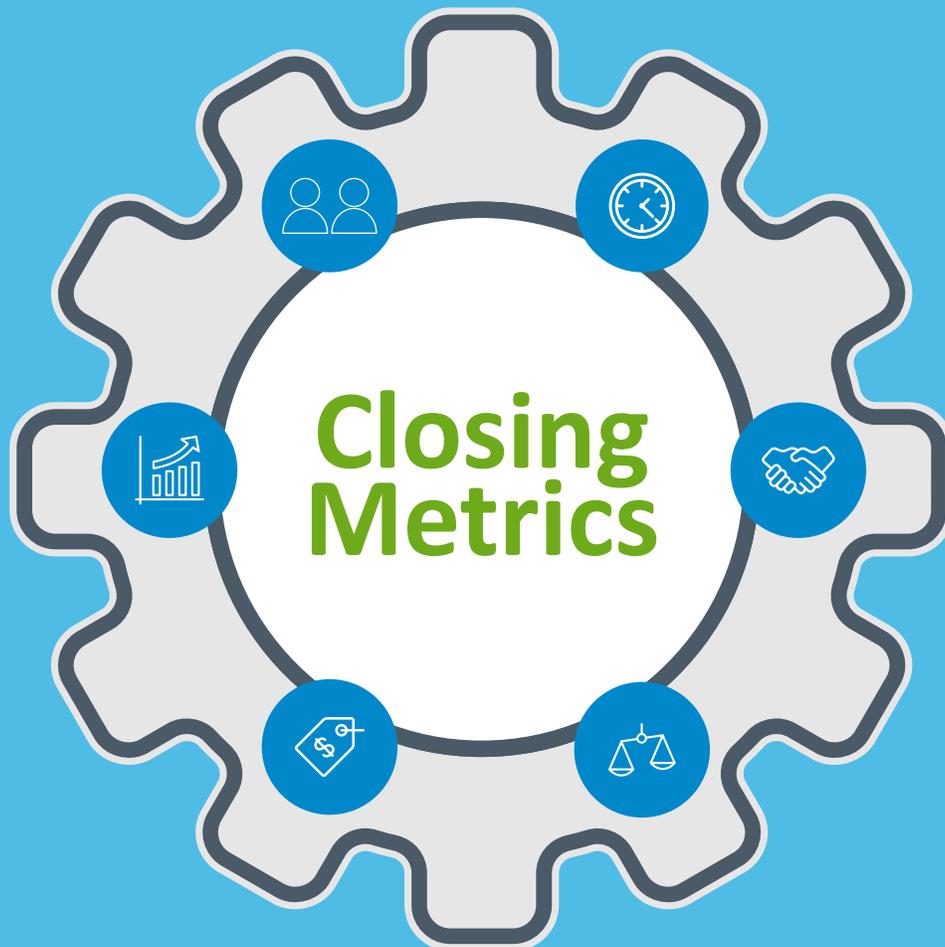
EMPLOYEE-DIRECTED PARTNERSHIP ACTIVITIES

Percent of Respondents Not Offering Employee Directed Partnership Activities



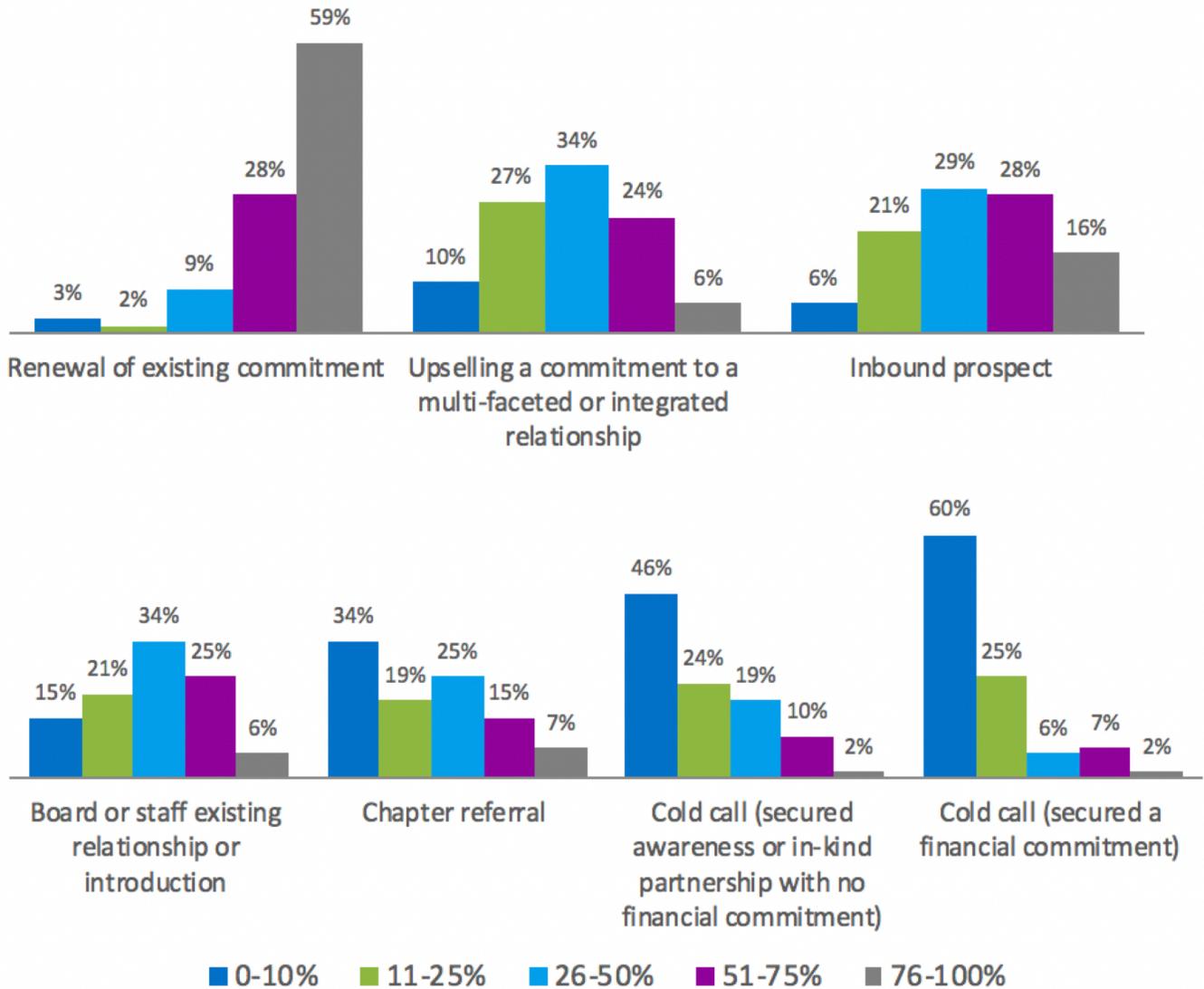
Q7: For each of the following employee-directed partnership activities, on average, how many months does it take to secure a commitment once you have held an initial conversation?

A large number of survey respondents selected N/A in terms of offering employee-directed partnerships. Marketplace data regarding corporate partnership interests substantiates that employees are an increasingly desirable audience for social impact partnerships. This is a missed opportunity!



CLOSE RATE

Average Close Rate On Securing A Commitment



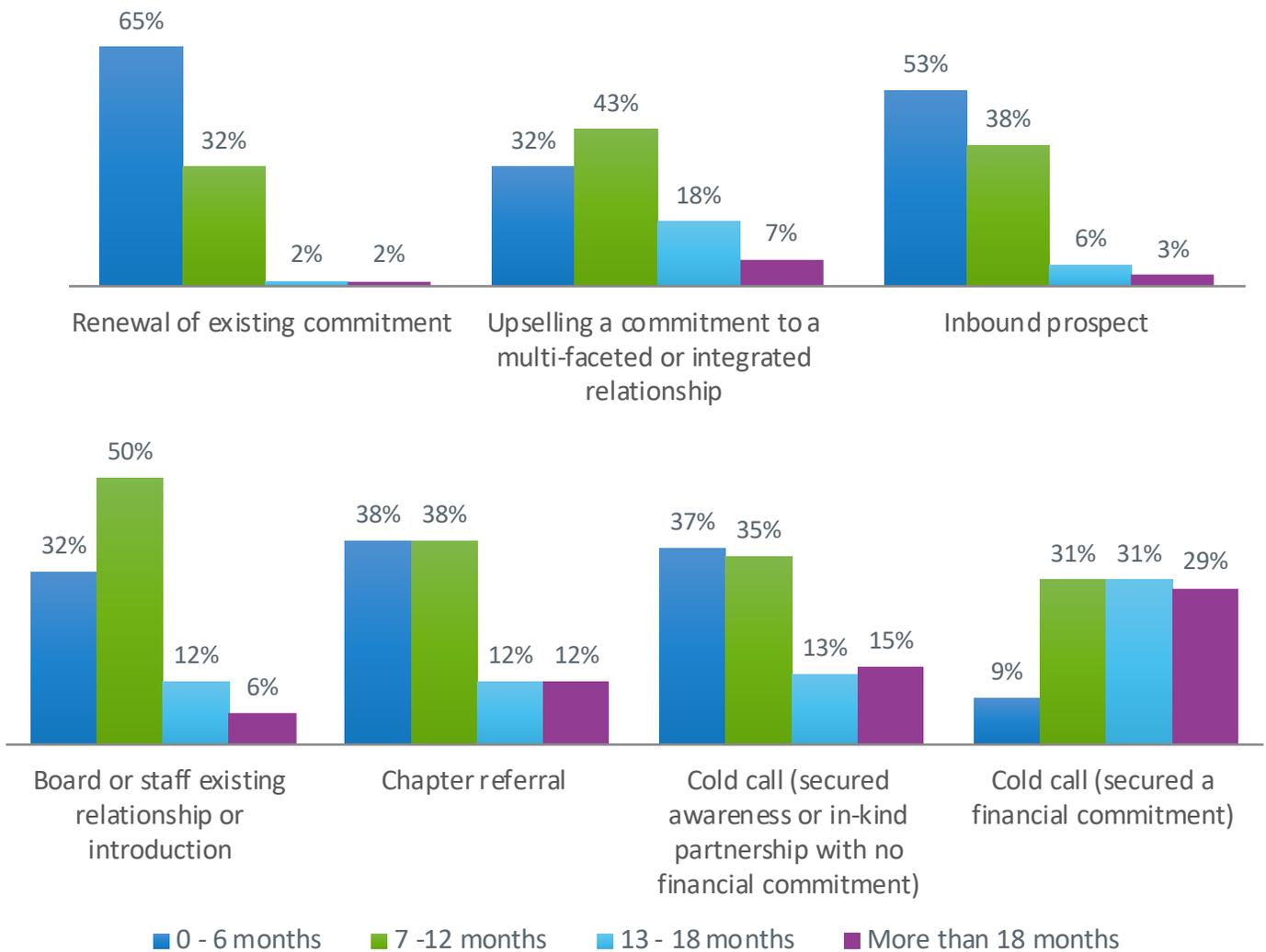
Q9: In any time frame, what is your average close rate on securing a commitment from the following categories of corporate relationship?

The average close rate is much higher for renewals of existing commitments, followed by inbound prospects.

Though cold calls have the smallest close rate, they are an essential element of a healthy prospect pipeline. Focusing only on existing partners or relying on board introductions can be risky.

CLOSE TIME FRAME

Average Number Of Months To Secure A Commitment



Q11: On average, how many months does it take to secure a commitment from the following categories of corporate relationships?

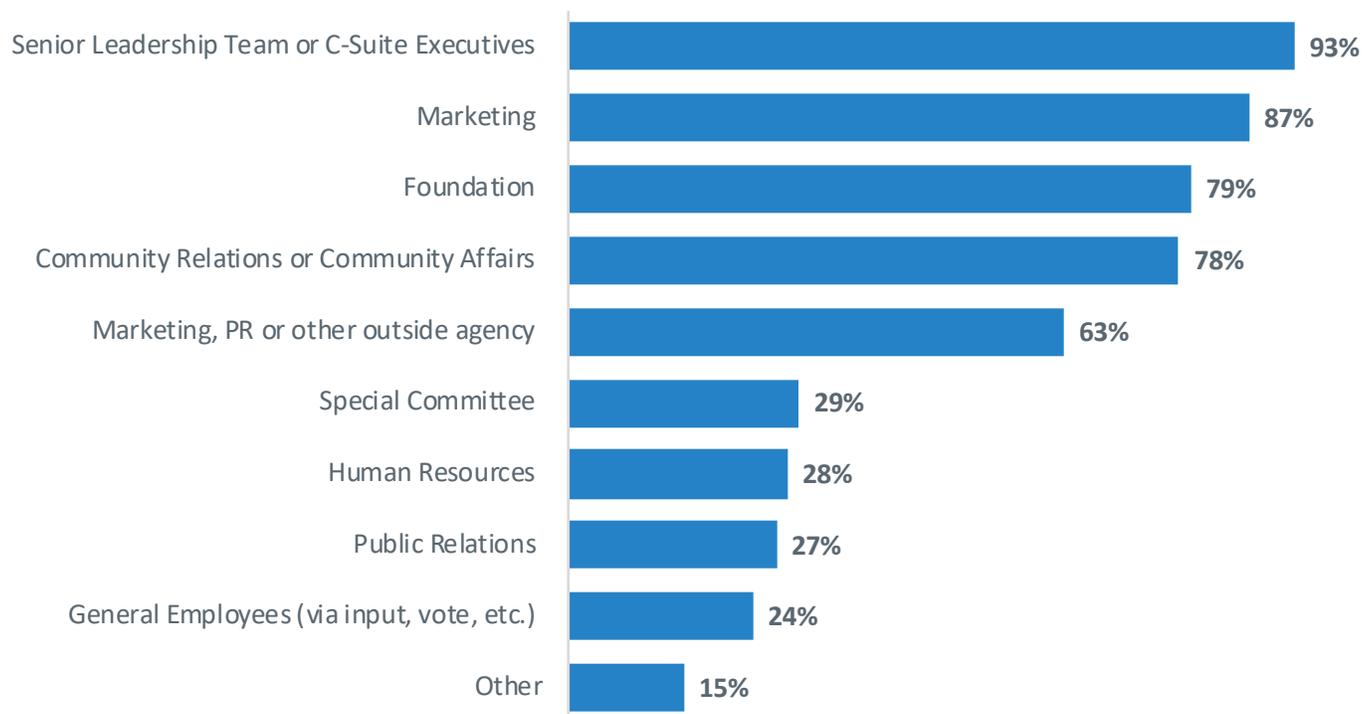
Renewal of existing commitments have the fastest close time followed by inbound leads.

In general, the warmer the relationship, the faster the deal will close.



DEPARTMENTS INVOLVED IN SECURING CORPORATE COMMITMENTS

Partner Prospect Departments Involved In Decision-Making When Securing Corporate Commitments



Q13: In your overall experience in securing corporate commitments, which of the following partner prospect departments are involved in decision-making? Select all that apply.

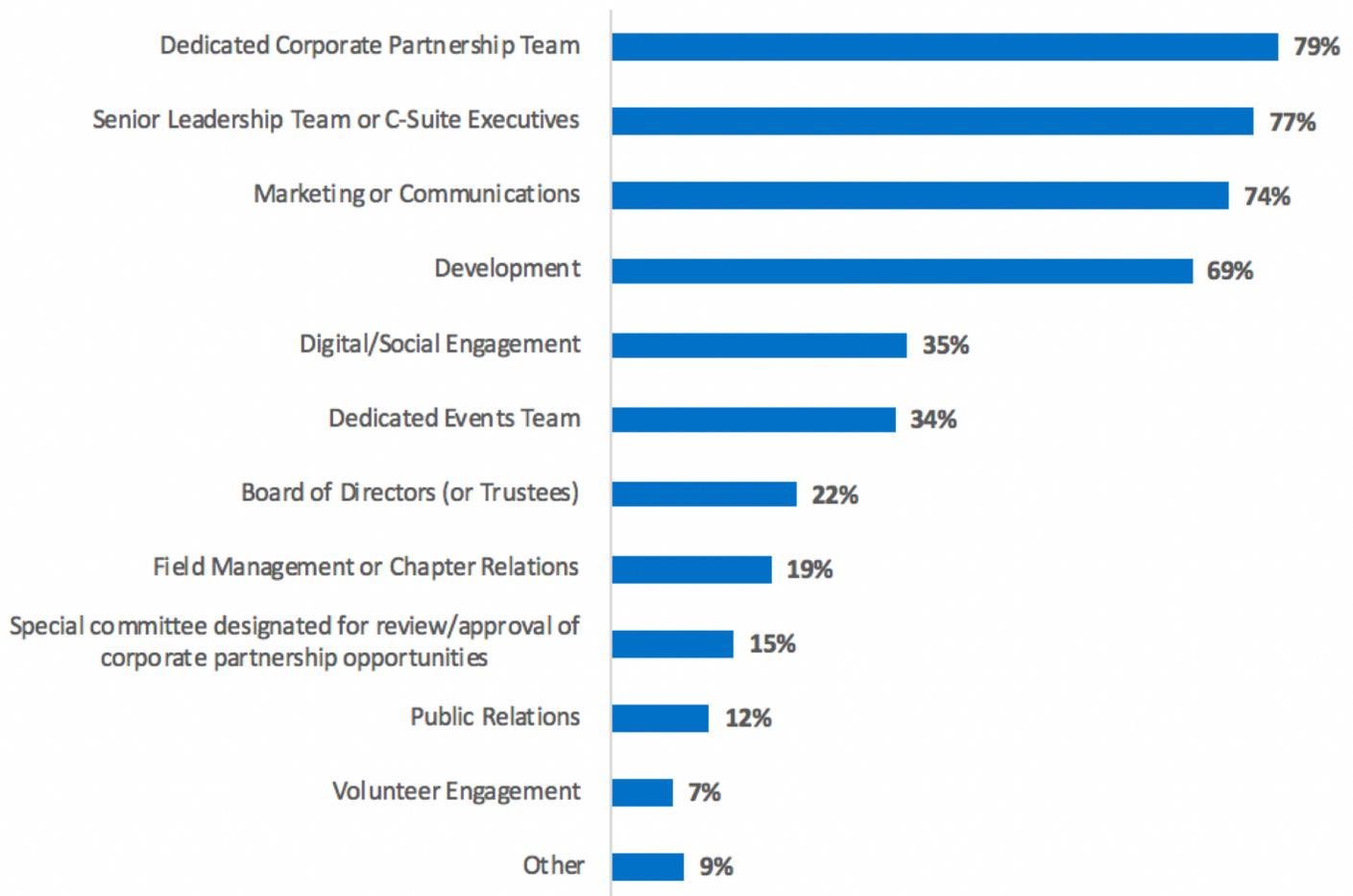
On the Corporate Partner side, there are at least 4 departments that are highly involved in the decision-making process.

Senior leadership is more involved than ever before which reflects the increasing importance of cause/CSR in business strategies.

Be sure to integrate a variety of partnership activations that will appeal to this broad range of perspectives.

INTERNAL DEPARTMENTS INVOLVED IN CORPORATE PARTNER SALES & RENEWALS

Departments Within Nonprofit Involved In Decision-Making For Corporate Partnership Sales And Renewals



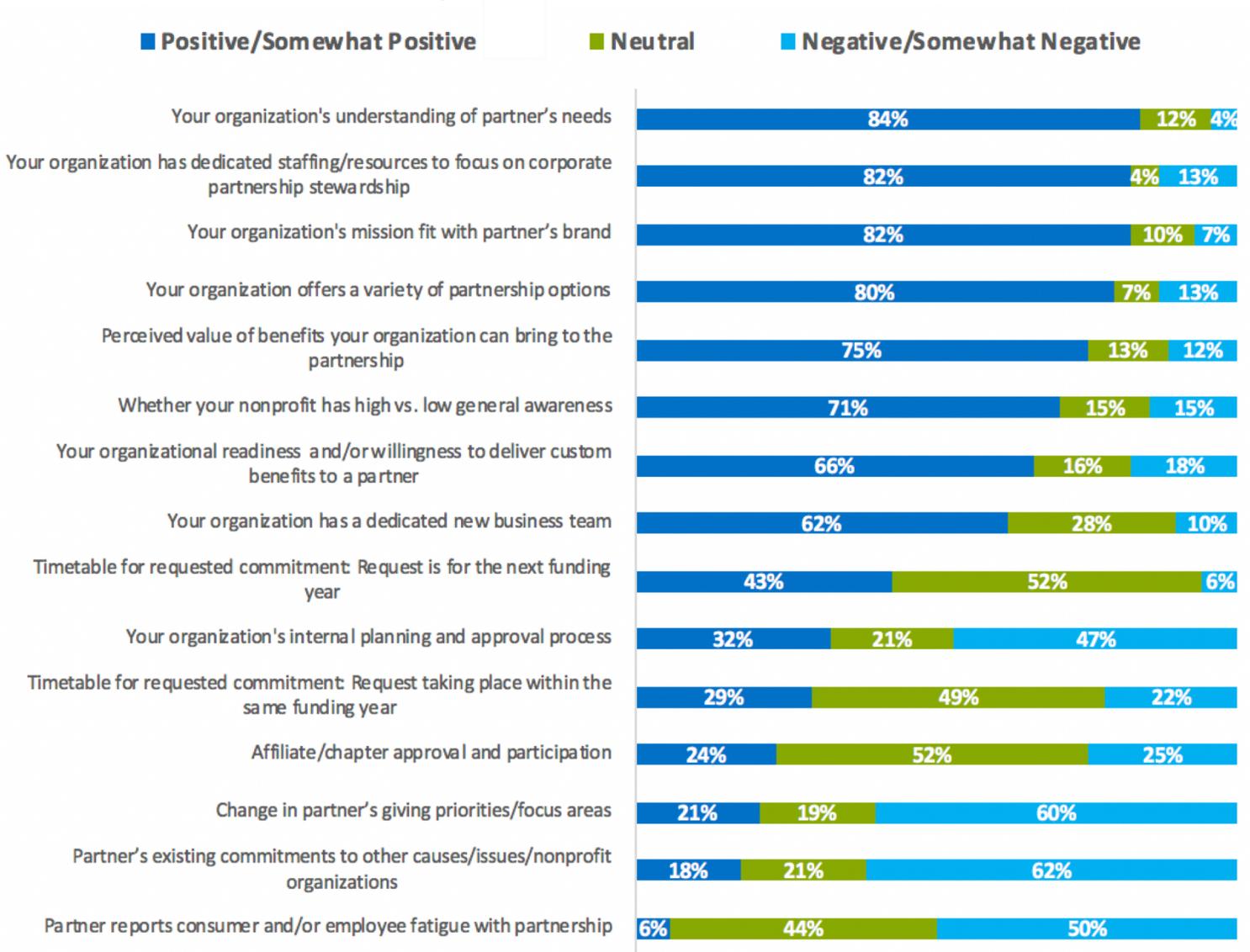
Q14: Which of the following departments within your nonprofit organization are involved in decision-making for corporate partnership sales and renewals? Select all that apply.

Within the nonprofit organization, there are also 4 departments that have similar levels of high involvement in the decision-making process for corporate partnership sales and renewals.

Of note, many activation elements are delivered by staff that are less often involved in partnership decision-making. When planning effective partnerships, be sure to involve the input of key stakeholders for success.

IMPACT ON ABILITY TO SECURE CORPORATE PARTNERS

Factors That Impact An Organization's Ability To Secure Corporate Partners



Q15: Please rate the following variables on the impact you believe they have on your organization's ability to secure corporate partners. Use the scale provided where 1 indicates a Negative Impact and 5 indicates a Positive Impact.

To assist with partnership planning, the survey gathered data on a wide range of partnership planning factors.

Using a scaled response system, the above data shows both positive and negative influencers.

Deeper insight into this data is provided in the following pages.

Positive Impact On Ability To Secure Corporate Partners

Top 10 Factors That Impact An Organization's Ability To Secure Corporate Partners – POSITIVE



Q17: Thinking about question 15, what is the single most positive variable to securing a commitment for a corporate partnership? Please select one.

Listen, listen, listen – your understanding of the partner's needs is the top factor toward positive relationship results.

Staff partnerships appropriately. If possible, provide a dedicated resource for optimal stewardship.

Focus your energies on partnerships with clear brand and budget alignment, and offer the partner a variety of options.

Negative Impact On Ability To Secure Corporate Partners

Top 10 Factors That Impact An Organization's Ability To Secure Corporate Partners – NEGATIVE



Q18: Thinking about question 15, what is the single most negative variable to securing a commitment for a corporate partnership? Please select one.

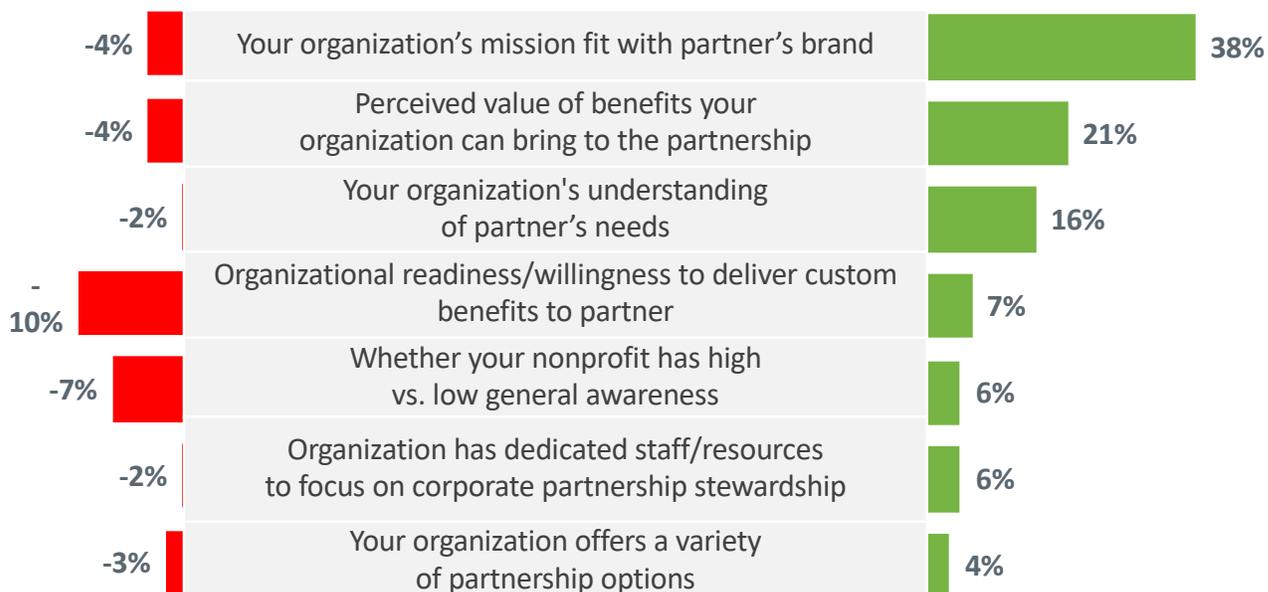
Some of the factors that negatively impact partnership success are beyond the nonprofit's control, such as existing commitments or a change in giving priorities.

However, success can be achieved by proactively offering new ways to engage customers and employees, and by making the planning and paperwork piece as quick and painless as possible.

Most Positive/Negative Factor To Securing Commitment

SINGLE MOST NEGATIVE FACTOR

SINGLE MOST POSITIVE FACTOR



Q 17/18: Thinking about question 15, what is the single most positive & negative variable to securing a commitment for a corporate partnership? Please select one.

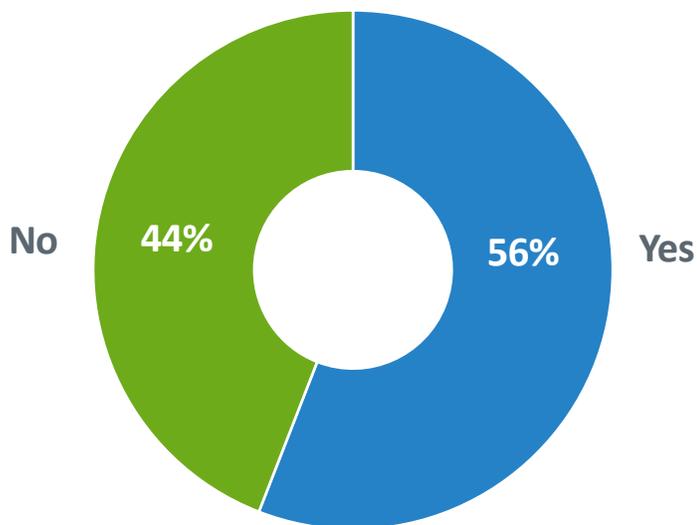
The factors most likely to help secure a commitment for a corporate partnership are your organization's mission fit with the partner's brand, the perceived value of the benefits you can bring to the partnership and your understanding of the partner's needs.

The factors most likely to have a negative impact on securing a corporate partnership commitment are partner's existing commitments to other organizations followed closely by a change in partner's giving priorities/focus. However, two important variables you can influence for improvement are providing a longer timetable for the ask and an easier approval process.

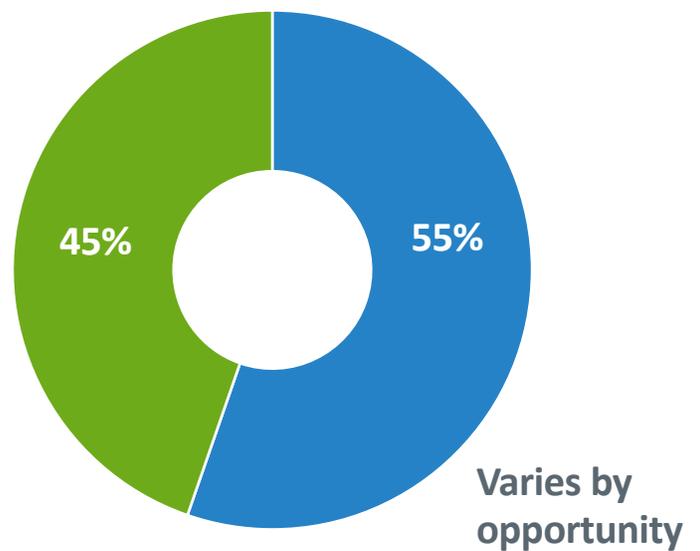


Guaranteed Minimum for Corporate Partnership

Organization requires guaranteed minimum for corporate partnership?



What is the guaranteed minimum for corporate partnership?



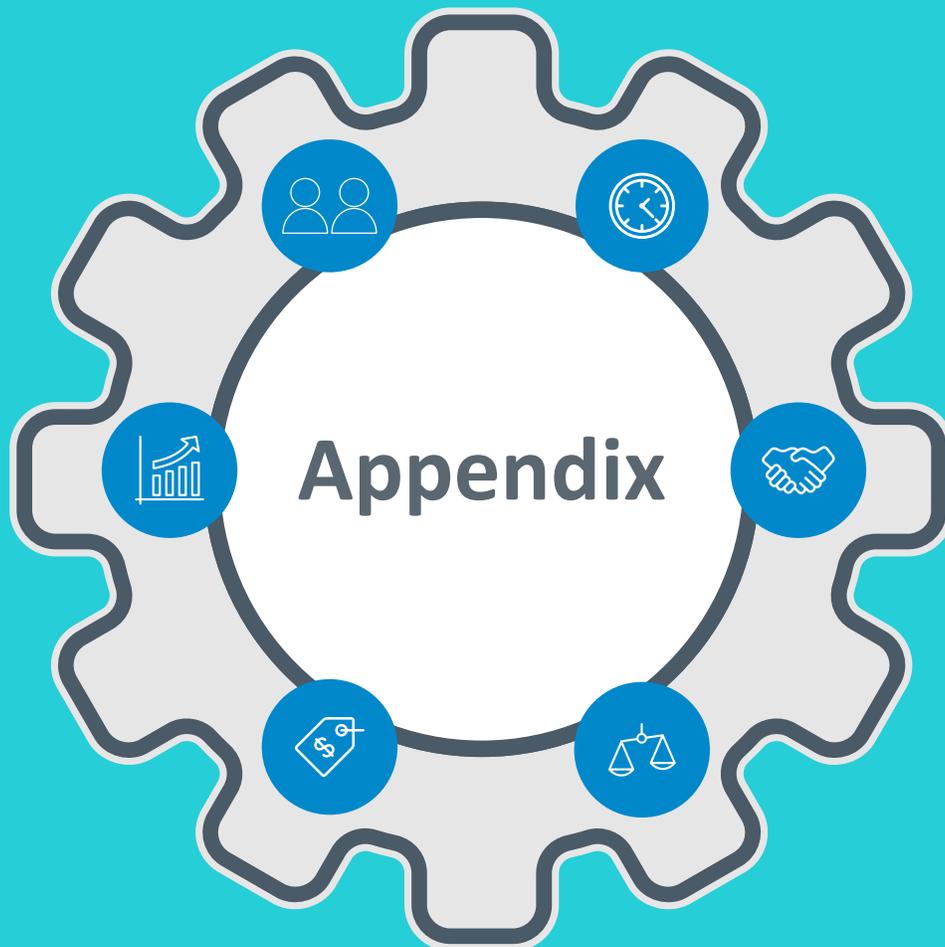
2019 Base=68 Nonprofit Partnership Sales Experts

Q19: Does your organization require a guaranteed minimum for corporate partnership?

Q20: What is the guaranteed minimum for corporate partnership?

Slightly more than half of the nonprofits interviewed indicated they require a guaranteed minimum for a corporate partnership.

Among those who do require a minimum, the majority indicate that the minimum guarantee varies by opportunity.



Questions List

1. Sponsorship (Unrestricted Funding): For each of the following sponsorship levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation? For the purposes of this survey, sponsorship is defined as unrestricted funding -- a primarily cash funder or in-kind contributor for an event, specified campaign or activity. Please indicate which time frame is most common from your experience.
2. Please provide any additional thoughts or experiences you have on securing a commitment for sponsorship.
3. Programmatic Support (Restricted Funding): For each of the following support levels and types, on average, how many months does it take to secure a commitment after you have had an initial conversation? For the purposes of this survey, direct programmatic support is defined as restricted funds or a corporate grant used to fund a specific program, research project, a specified campaign or mission goal. Please indicate which time frame is most common from your experience.
4. Please provide any additional thoughts or experiences you have on securing additional commitment for a programmatic support.
5. Integrated Partnership (could represent a combination of unrestricted and restricted funding): For each of the following integrated partnership levels and types, on average, how many months does it take to secure a commitment once you have held an initial conversation? For the purposes of this survey, integrated partnership is defined as a two-way relationship where both you and your corporate partner leverage shared assets and activate the partnership to raise awareness and/or funds from a variety of constituents such as consumers. Please indicate which time frame is most common from your experience.
6. Please provide any additional thoughts or experiences you have on securing a commitment for an integrated partnership.
7. Employee-Directed Partnership Activities (including, but not limited to, peer to peer and/or DIY and volunteerism): For each of the following employee-directed partnership activities, on average, how many months does it take to secure a commitment once you have held an initial conversation? For the purposes of this survey, employee-directed partnership is defined as a relationship where your corporate partner activates its employee base to raise awareness and funds by encouraging workplace activities, creating teams or P2P fundraising efforts, engaging employees to volunteer to support your cause, employee giving, matching grants and skilled volunteerism. Please indicate which time frame is most common from your experience.
8. Please provide any additional thoughts or experiences you have on securing a commitment for employee-directed partnership activities.
9. In any time frame, what is your average close rate on securing a commitment from the following categories of corporate relationship?
10. Please provide any additional thoughts or experiences you have on securing a commitment from these corporate relationships.
11. On average, how many months does it take to secure a commitment from the following categories of corporate relationships? Please indicate which time frame is most common from your experience.
12. Please provide any additional thoughts or experiences you have on securing a commitment from these corporate relationships.

Questions List (cont'd)

13. In your overall experience in securing corporate commitments, which of the following partner prospect departments are involved in decision-making? Select all that apply.
14. Which of the following departments within your nonprofit organization are involved in decision-making for corporate partnership sales and renewals? Select all that apply.
15. Please rate the following variables on the impact you believe they have on your organization's ability to secure corporate partners. Use the scale provided where 1 indicates a Negative Impact and 5 indicates a Positive Impact.
16. Are there any other variables that have a significant impact in your organization's ability to secure corporate partners?
17. Thinking about the previous question, what is the single most positive variable to securing a commitment for a corporate partnership? Please select one.
18. Thinking about the previous question, what is the single most negative variable to securing a commitment for a corporate partnership? Please select one.
19. Does your organization require a guaranteed minimum for corporate partnership?
20. What is the guaranteed minimum for corporate partnership? Please answer using numbers only.
21. What is your organization type?
22. What was your organization's total income in 2018? Please answer using numbers only.
23. What was your organization's Total Corporate Income in 2018? Please answer using numbers only.
24. What other nonprofit organizations have you worked for? List up to 5. If you have not worked for other nonprofit organizations, respond "N/A"
25. Current Organization:
Please insert your Current Organization and Job Title
26. Job Title: Please insert your Current Organization and Job Title
27. How long have you been in your current role?
28. What was your organization's total income in 2018? Please answer using numbers only.
29. What was your organization's Total Corporate Income in 2018? Please answer using numbers only.



ForMomentum

Bringing Causes and Companies Together to Multiply Good

Who We Are

As one of the largest agencies in the country solely dedicated to fostering social impact partnerships, For Momentum brings nonprofits and businesses together to collaborate, raise funds and awareness for the issues they care about. Driven by both results and relationships, our goal is to see our clients, community and culture thrive.

What We Do

Collaboration and strategic partnerships are fundamental to improving both nonprofit and business outcomes. At For Momentum, we have developed more than 250 major partnerships and strategic alliances that have brought innovation, stewardship and new collaborative opportunities to our clients. Through our sixteen years in the cause partnership world, we have collectively raised over 700 million dollars. We understand how important data-informed decisions are when developing partnerships.

Our Services



**Social Impact
Strategy**



**Pipeline
Expansion**



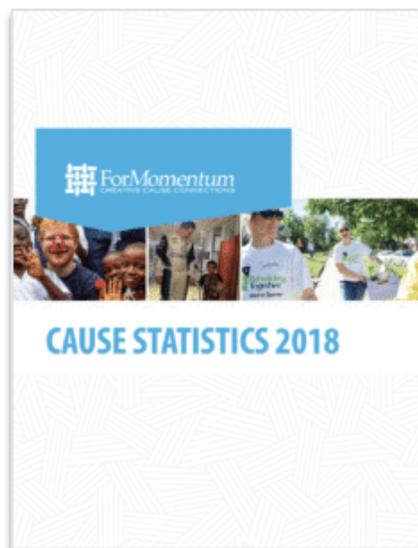
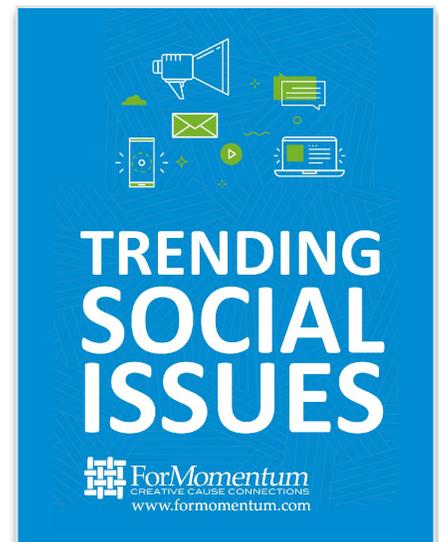
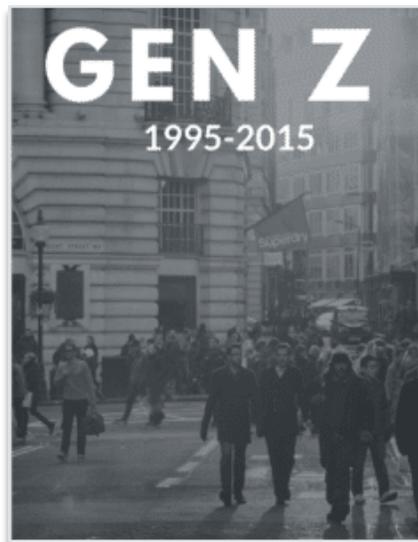
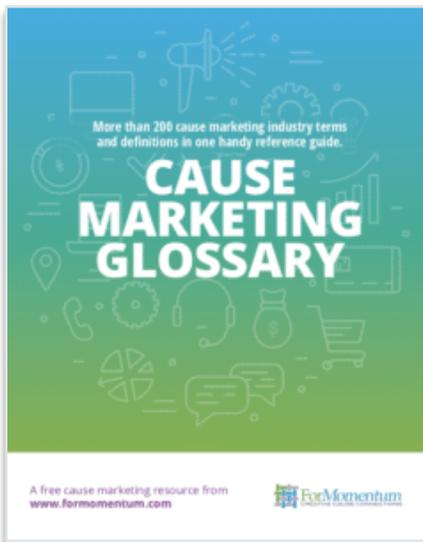
**Creative
Activations**



**Cause
Trainings**



Additional Resources



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