

Hello!



Daniel Servante
Attrition Specialist

1.01% attrition
(2 of 198
cancelled)



Sam Hollyman
Compliance Champion

2000+ donors
0 negative
welcome calls

Certified



Corporation



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What is a Green Light Sites Audit?

- 3 hours, live feedback
- D2D, Street or Venues
- Detailed reports
- Custom database
- Mystery shop included
- Dynamic and responsive

Total Number of Audits	Date of Most Recent Audit	Average Work Rate	Most Recent Work Rate	Total Number of Manager Audits	Average Manager Score	Most Recent Manager Score	Average Individual Compliance Score	Most Recent Individual Compliance Score	Average Environmental Score	Most Recent Environmental Score
4	16/07/2021	73.17%	63.00%	4	82.74%	78.57%	86.74%	100.00%	89.00%	100.00%
4	20/07/2021	76.25%	85.00%	3	77.78%	80.90%	83.52%	100.00%	100.00%	100.00%
20	08/08/2022	79.71%	90.00%	3	84.15%	85.71%	85.80%	100.00%	91.67%	99.67%
3	15/10/2023	83.00%	100.00%	18	85.83%	100.00%	86.30%	100.00%	86.00%	100.00%
3	15/07/2023	86.33%	100.00%	3	82.54%	92.86%	92.86%	100.00%	100.00%	100.00%
5	31/03/2021	77.00%	75.00%	2	83.33%	92.86%	92.86%	100.00%	100.00%	100.00%
3	27/04/2022	82.80%	90.00%	4	86.90%	92.86%	91.86%	100.00%	93.33%	100.00%
16	07/04/2025	78.00%	100.00%	14	82.48%	80.95%	84.23%	100.00%	91.25%	66.67%
7	28/06/2022	83.57%	80.00%	8	90.67%	85.71%	81.88%	100.00%	92.48%	100.00%
38	07/04/2025	81.52%	100.00%	31	84.30%	80.95%	85.12%	100.00%	92.84%	100.00%
7	07/04/2025	83.14%	85.00%	5	86.19%	80.95%	87.34%	81.82%	90.45%	100.00%
1	17/08/2020	76.00%	78.00%	1	92.86%	92.86%	80.95%	86.64%	86.64%	100.00%
3	07/04/2021	88.33%	100.00%	1	80.95%	80.95%	85.81%	86.64%	86.64%	100.00%
1	20/09/2021	70.00%	70.00%	1	80.95%	80.95%	83.33%	65.81%	88.89%	100.00%
1	03/11/2020	94.00%	94.00%	1	80.95%	80.95%	83.33%	79.56%	77.78%	100.00%
1	14/09/2022	90.00%	90.00%	1	82.86%	80.95%	88.64%	88.64%	100.00%	100.00%
15	01/11/2023	80.00%	100.00%	1	100.00%	100.00%	88.64%	88.64%	100.00%	100.00%
1	02/05/2020	84.00%	84.00%	15	85.87%	73.81%	88.64%	77.78%	100.00%	100.00%
				1	73.81%	100.00%	77.27%	100.00%	100.00%	100.00%

Section	Question	Answer	Points Awarded	Max Points
individual	Was the Fundraiser's ID clearly visible at all times whilst fundraising?	No	0	5
	Was the Fundraiser wearing appropriate uniform?	Yes	3	3
	Did the Fundraiser avoid approaching people clearly working in the centre or station?	Yes	1	1
	Did the Fundraiser stick to their designated promotional area?	Yes	5	5
	Did the Fundraiser remove all branding when away from the stand and/or on break?	Yes	5	5
	Did the Fundraiser remove all branding when away from the stand and/or on break?	Yes	1	1
	If smoking on breaks, did the Fundraiser avoid doing so outside the nearest entrance/exit to the stand?	Yes	3	3
	Did the Fundraiser remove all charity branding when on or looking at their phone?	Yes	5	5
	Did the Fundraiser use appropriate language when approaching people?	Yes	3	3
	Did the Fundraiser avoid taking more than three steps alongside or in pursuit of a member of the public?	Yes	5	5
	Did the Fundraiser disclose that they are a Paid Professional Fundraiser working for the appropriate organisation before receiving any bank details for donations?	Yes	1	1
	Did the Fundraiser and all interactions on a positive note regardless of whether or not they stopped?	Yes	1	1
	Did the Fundraiser avoid approaching anyone stationary?	Yes	1	1
	Did the Fundraiser avoid approaching anyone stationary?	Yes	1	1
	environment	Please give a summary of the Fundraiser with regards to compliance, operational functionality and professionalism.	I did not see her check her phone and her energy levels were high and positive throughout the audit. I did not see her check her phone and her energy levels were high and positive throughout the audit. Her body language was open, she was smiling and waving at members of the public. There was a period of 15 minutes when her ID was not clearly visible and she used a single use coffee cup, albeit not while fundraising. She removed her branding whenever she went on break and put it back on when she returned.	
Did the Fundraiser appear to have several engaging conversations with members of the public?		Yes	1	1
Did the Fundraiser avoid using plastic bags?		No	0	1
Did the Fundraiser avoid using single use plastics?		Yes	1	1
Did the Fundraiser avoid littering in any way?		Yes	10	10
Please give a score out of 10 for how comfortable the fundraiser made members of the public feel regarding COVID safety.		No	0	5
Did all team members have their ID clearly visible at all times whilst fundraising?		Yes	3	3
Did all team members wear appropriate uniform?		Yes	1	1
Did all team members avoid approaching people clearly working in the centre or station?		Yes	5	5
Did all team members stick to their designated promotional area?		Yes	5	5
Did all team members remove all branding when away from the stand and/or on break?		Yes	3	3
Did all team members remove all branding when on or looking at their phone?		Yes	5	5
Did all team members use appropriate language when approaching people?		Yes	3	3
Did all team members avoid taking more than three steps alongside or in pursuit of a member of the public?		Yes	5	5
team management		Did all team members disclose that they are Paid Professional Fundraisers working for the appropriate organisation before receiving any bank details for donations?	Yes	1
	Did all team members and all interactions on a positive note regardless of whether or not they stopped?	Yes	1	1
	Did all team members avoid approaching anyone stationary?	No	0	5
	Do all team members have access to tablets, or any other materials required to sign donors up, in an acceptable condition?	Yes	1	1
	Did the manager maintain energy levels with team talks and motivation?	Yes	5	5
	Did the team stick to the maximum number of people on the stand permitted by the site provider?	No	0	3
	Did the stand look professional and tidy with no cups, bottles, litter or personal belongings visible at any time?	No	0	3
	Team Summary			
I arrived on site at 10:38am. The team was already set up, all three were in branding and engaging members of the public. Their energy level was high and passionate. For the first 15 minutes of the audit, the ID was not clearly visible and also had a 15 minute period when her ID wasn't visible. The team took about 15 minutes or so. Every team member removed their branding and ID when going for a break and put their tablets back on before re-engaging members of the public.				



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Don't take our word for it...

"Since launching our audits, we've been consistently impressed. The daily live updates provide invaluable, real-time insights into our team's performance in the field, and the level of detail captured in their audit reports is beyond anything we've seen elsewhere."

Josh Kendall, Sustrans

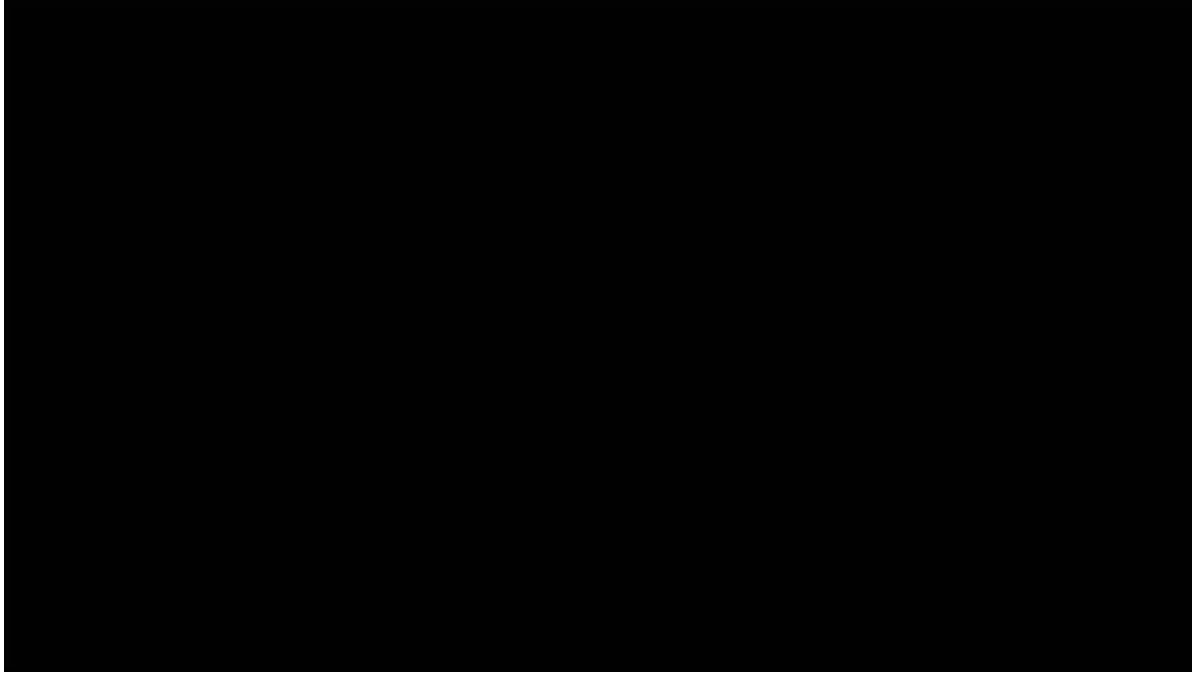
"Moving to an outsourced model with GLS not only saved us money when compared to our previous internal resource, their industry expertise, and the resulting level of detail in the GLS reporting, exceeds that which we had in place prior to our partnership."

Paul Breese, Guide Dogs



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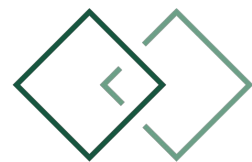
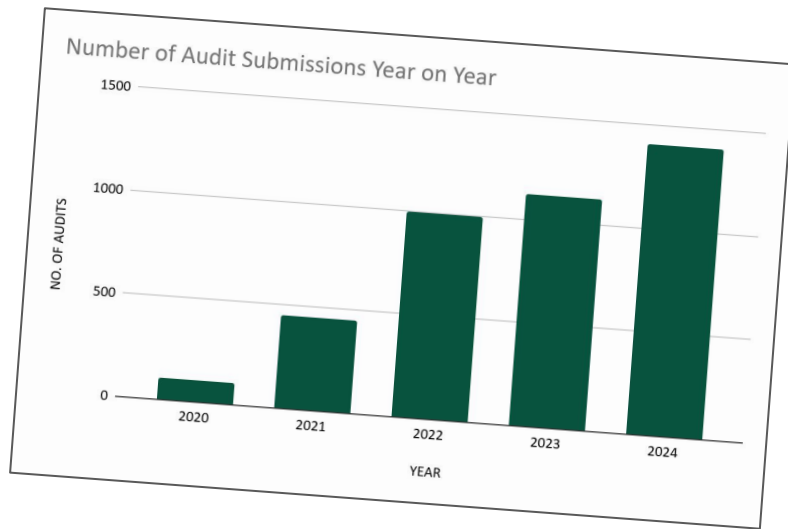
Meet an auditor!



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What have we learned?

- 2024 was the highest scoring year to date
- Work Rate is the most improved category
- Sign Up Process is consistently the lowest scoring category
- Opt Ins is the biggest opportunity for improvement and ROI impact



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A closer look...

Mystery Shop Sign Up Process Score	2023	2024
Overall Score	70.88%	71.70%
Details Taken Accurately and Professionally	94.34%	96.16%
Attention Drawn to Terms and Conditions	80.75%	81.34%
Benefits of Opting into Marketing Contact Highlighted	67.17%	62.19%
Clarification That Contact Would Be Marketing	41.15%	26.11%
Clarification of Option to Opt In/Out at Later Date	45.66%	42.47%
Gift Aid or Lottery Explained	86.04%	89.59%
Financial Disclosure Before Bank Details	82.64%	81.37%
Follow Up Call Mentioned	87.55%	93.97%
Total Number Audit Submissions	265	365



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The challenge

- Lack of consistency across regions, offices & agencies
- High cost of training
- Outdated and uninspiring content
- Information accessibility
- Lack of flexibility for different learning styles



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Green Light Skills

- 17 modules and counting
- Long form training room content
- Short form portrait videos on the field
- Integration with audits
- Customisable and branded



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A quick example!



Green Light Skills

- Early & Financial Disclosures
 - Advanced Vulnerability
 - Complaint Avoidance & Handling
 - Gift Aid
 - Ice Breakers & Stopping Lines
 - Instant Payment Troubleshooting
 - Opt Ins
 - Site Etiquette Door
 - Site Etiquette Venues
 - Importance of Long Term Giving
 - Importance of Opt Ins
- Early response handling
 - Quality & Quantity
 - Rebuild & Second Ask
 - Dialogue Structure & Ask
 - Door to Door Tracking
 - Painting Pictures with Words
 - The Art of an Emotive Dialogue



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Looking to the future...

- Compliance as more than box-ticking and complaint avoidance
- Proven to increase productivity and ROI
- Bringing mystery shops and compliance monitoring into the modern era
- Accessible and flexible training content
- Consistent and cost effective messaging
- This is the future!
- It is inevitable!



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Any questions?



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