



Managing a Multi-Channel Annual Giving Program

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Presentation Objectives



- ▶ Opportunities for annual giving
- ▶ Outline components of comprehensive multi-channel program
- ▶ Review multi-channel strategies
- ▶ Products and services that can help you



Annual Giving

- ▶ Annual Giving has taken a back seat with the increased prominence of capital campaigns, principal gifts and major gifts
- ▶ Reasons Annual Giving isn't a priority:
 - ▶ Increased alumni base (for education sector)
 - ▶ Generational changes
 - ▶ Increased philanthropic competition
 - ▶ Health of major donor pipelines
 - ▶ Capital campaigns are on-going



Annual Giving Offers

- ▶ Annual giving vs. campaign mindset
 - ▶ Annual timelines vs. campaign timeline
 - ▶ Perennial campaigns
 - ▶ Preparing for next campaign
- ▶ Cultural change
 - ▶ Annual giving vs. giving annually
 - ▶ Increase lead annual gifts
- ▶ Event-based fundraising/3rd party fundraising
- ▶ Major donor identification
- ▶ Donor engagement/Stewardship



Annual Giving

► Opportunities

- Offset declines by **increasing participation** and donor numbers
 - Key Performance Indicators (KPI) /Metric analysis is key
- **Develop a culture** that responds to each new campaign through growth
 - There is a continued need to seek and secure new donors that move through the donor continuum
- **Align messaging** to focus on goals and understand the mission
 - Donors are outcomes oriented
 - Emphasize impact and how your organization is achieving its mission via philanthropy

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Fundamentals

- Direct Mail
- Phonathon
- Email Solicitation
- Peer-to-peer & Staff-to-peer giving
- Data Analysis
- Building a culture of philanthropy

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Today's Priorities

- ▶ Robust direct marketing/digital marketing
- ▶ Peer-to-peer and staff-to-peer giving
- ▶ Micro-campaigns (giving days, crowdfunding)



Why Multi-Channel Marketing?

- ▶ Companies with extremely strong omnichannel customer engagement retain on average 89% of their customers, compared to 33% for companies with weak omnichannel customer engagement (Aberdeen Group).
- ▶ 55% of companies have no cross-channel strategy in place (The CMO Club).
- ▶ 64% of marketers cite lack of resources and investment as their top barrier to omnichannel marketing (The CMO Club).
- ▶ 98% of Americans switch between devices in the same day (Google Research).
- ▶ Over last 10 years, frequency, pieces and channels have changed in annual funds
- ▶ More noise and competition in marketplace

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Good vs. Bad

Pros

- ▶ Better results (In time)
- ▶ More tools
- ▶ More precision
- ▶ More channel accountability
- ▶ Relevant analytics
- ▶ Big data
- ▶ Automation
- ▶ Real-time responsiveness

Cons

- ▶ More noise
- ▶ Need for increased frequency
- ▶ Static budgets
- ▶ Confusion
- ▶ Staff resources and familiarity with functionality



Multi-Channel Campaign

GOAL	MEDIUM	INBOUND	TIMING
BUDGET	MESSAGE	OUTBOUND	FREQUENCY

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Direct Mail Strategies

- ▶ Timing and Frequency
- ▶ Fundamentals are still the Fundamentals
- ▶ Installments
- ▶ Variable Data
- ▶ Lumpy mail or premiums
- ▶ Email triggers
- ▶ Augmented reality



Telemarketing Strategies

- ▶ Young alumni credit card/first ask (education sector)
- ▶ Affinity calling pools
- ▶ Long term pledges
- ▶ Retargeting for fulfillment
- ▶ Shorten fulfillment cycle
- ▶ 2nd/3rd ask strategies
- ▶ Append cell phone data



Digital Strategies

- ▶ Timing
- ▶ Re-send to opens only
- ▶ 94% of responses within 48 hours
- ▶ Subject line tests and preview copy
- ▶ Geo fencing: the use of GPS or RFID technology to create a virtual geographic boundary, enabling software to trigger a response when a mobile device enters or leaves a particular area.
- ▶ Snap filters
- ▶ Affinity champions/ambassadors

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Peer-to-Peer

- ▶ Peer Relations
- ▶ IT IS NOT ABOUT ME
- ▶ Telling a story
- ▶ Sharing a perspective = the individual receiving
- ▶ Customize language
- ▶ Offers engagement opportunity for signer



Essential KPIs

- ▶ Basic
 - ▶ # of gifts, dollars raised, # of donors, retention rate
- ▶ Lost Revenue
 - ▶ Lapsed new, lapsed repeat, downgrade
- ▶ Added Revenue
 - ▶ New, recaptured, upgraded
- ▶ Return on Investment (ROI)
- ▶ AFP Fundraising Effectiveness Project – **Overall 45.5% Retention**
 - ▶ Every \$100 gained in upgraded, new and recovered gifts was offset by \$96 in losses from downgraded and lapsed gifts.



Case: Anniversary Campaigns

- ▶ Timeframe: Annual/Monthly
- ▶ Marketing Plan:
 - ▶ Month Prior:
 - ▶ Postcard (Mail 1)
 - ▶ Month of:
 - ▶ Mail in-house 1st week of month (Mail 2)
 - ▶ Email on the 15th of the month (Email 1)
 - ▶ Follow-up email on the 22nd to opens (Email 2)
 - ▶ Post gift:
 - ▶ Thank you call/note

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Case: Micro Campaigns

- ▶ Giving Days
 - ▶ Requires planning and coordination:
 - ▶ Allows for constituent segmentation
 - ▶ Increases presence/purpose of fundraising
 - ▶ Short duration with potential big impact
- ▶ Crowdfunding
 - ▶ Great for groups/3rd party fundraising
 - ▶ Provide toolkit and guidelines to participants
 - ▶ Develop goals per participant
 - ▶ Potential for acquisition beyond current donors
 - ▶ Possible loss of revenue in future years



Why Affinities?

- ▶ Appeals to Millennials, disengaged donors/groups, and peer-to-peer strategy
- ▶ You know it will be of interest to them
- ▶ Provides information about affinity area and sense of urgency to act
- ▶ Factors:
 - ▶ Historical giving, potential giving
 - ▶ Social influencers, pre-established networks
 - ▶ Individual segmentation

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Bringing All the Pieces Together

- ▶ Planning is key
- ▶ Increase communication with key team members
- ▶ Delineate roles and responsibilities
- ▶ Allow for flexibility and modify plan as needed



Data Analysis

- ▶ Understanding your data enhances your credibility and reinforces your decision making
- ▶ Determine how you can standardize reporting
- ▶ Change doesn't happen overnight
- ▶ Historical/Cyclical information is paramount
- ▶ Goals = pledges and cash, fulfillment management = \$ to your organization
- ▶ You should know who your loyal donors are = future pipeline



Annual Giving Products & Services



Creation

Video

- ▶ www.animoto.com
 - ▶ Share the power of video
 - ▶ A simple way to create marketing videos – in minutes – for social media.
 - ▶ Fast & easy to use, hosted in the cloud, customizable
 - ▶ No video editing experience required.

Crowdfunding

- ▶ Giving Day Campaigns, Social Ambassadors, Crowdfunding
- ▶ www.givecampus.com
 - ▶ Digital fundraising & volunteer management platform (for schools).
- ▶ www.hubbub.net
 - ▶ Fundraising technology for universities and nonprofits.

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Creation

Design

- ▶ Infographic, Presentations, Reports, Flyers & Posters Maker
- ▶ No design experience, easy to create and share
- ▶ Template based
- ▶ Refer to blog for tips
- ▶ www.piktochart.com

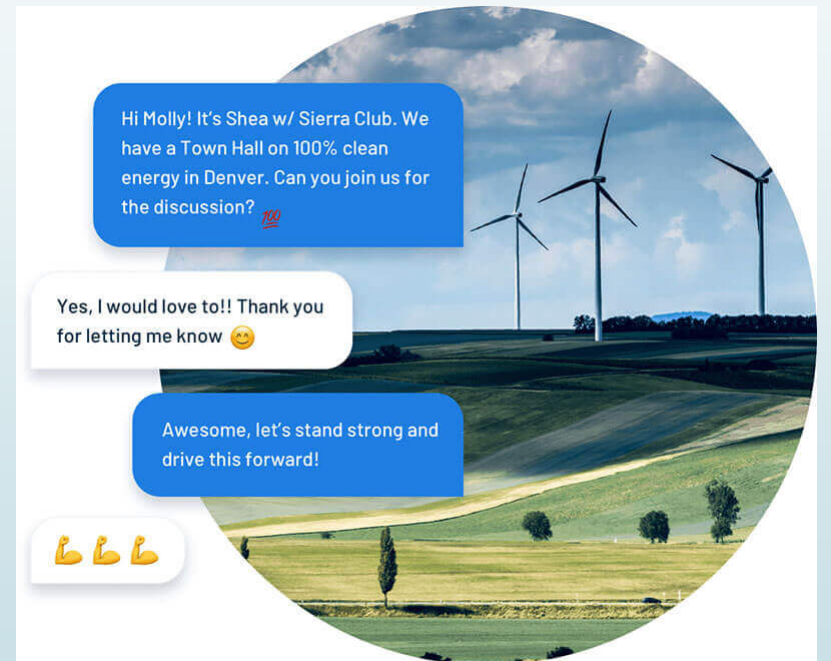
Communication

P2P Texting for Nonprofits

- ▶ www.hustle.com/non-profit/
 - ▶ Boost marketing efforts
 - ▶ Targeted messaging
 - ▶ Two-way messaging
 - ▶ Secure
 - ▶ Call Tracking
 - ▶ Easy, Fast & Personal

Community Phonecast

- ▶ www.communityphonecast.com
 - ▶ Innovative solution to enhance engagement and build loyalty



Communication

- ▶ Social media management platform
- ▶ Dashboard view
- ▶ Save time – schedule social media posts
- ▶ Manage content with ease
- ▶ Track and prove social ROI
- ▶ www.hootsuite.com



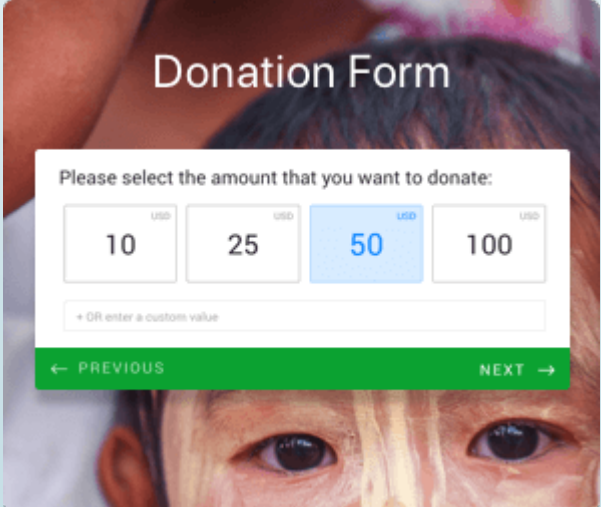
Coordinate

Doodle

- ▶ www.doodle.com
 - ▶ Simplifies process of scheduling meetings, appointments
 - ▶ On line calendar tool

Jotform

- ▶ www.jotform.com
 - ▶ Ease to use online form builder
 - ▶ Get an email for each response
 - ▶ Collect data



Donation Form

Please select the amount that you want to donate:

10 USD	25 USD	50 USD	100 USD
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+ OR enter a custom value

← PREVIOUS NEXT →

Coordinate

- ▶ Monthly Engaged Giving (MEG)
- ▶ Helps boost giving and participation rates
- ▶ www.twelvexgiving.com



Check

Litmus

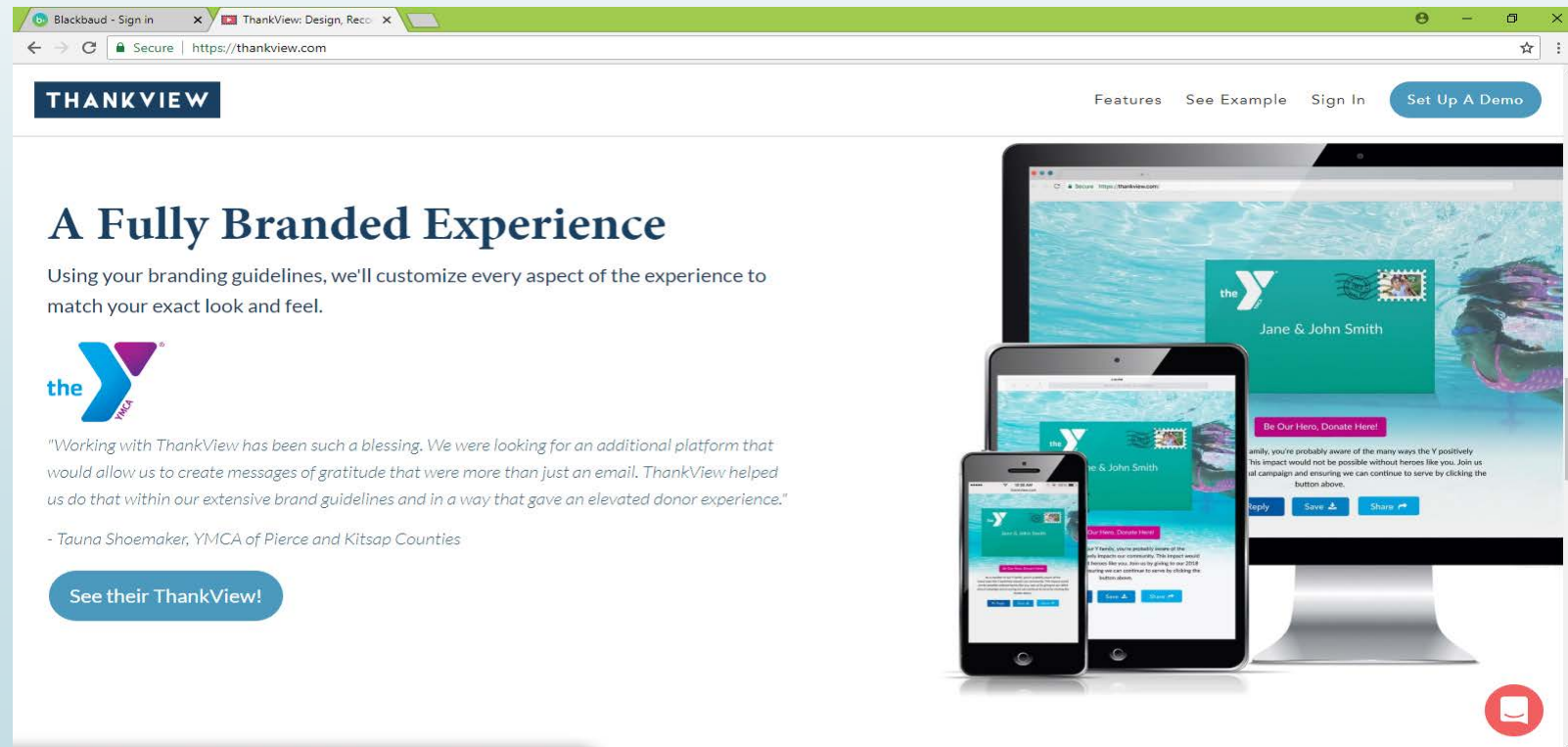
- ▶ www.litmus.com
 - ▶ Email testing tool
 - ▶ Spam testing, email analytics, email previews



Check

Thank View

- ▶ www.thankview.com
 - ▶ Create and send personalized video



The screenshot shows a web browser window with the URL <https://thankview.com>. The page features the ThankView logo in the top left and navigation links for Features, See Example, Sign In, and Set Up A Demo in the top right. The main heading is "A Fully Branded Experience", followed by the text: "Using your branding guidelines, we'll customize every aspect of the experience to match your exact look and feel." Below this is the logo for "the Y YWCA". A testimonial quote from Tauna Shoemaker, YWCA of Pierce and Kitsap Counties, is displayed. A blue button labeled "See their ThankView!" is positioned below the quote. On the right side of the page, there is a visual representation of the ThankView interface on a desktop monitor, a tablet, and a smartphone. The interface on the devices shows a personalized thank-you message for "Jane & John Smith" with a "Be Our Hero, Donate Here!" button and a "Share" button. A red speech bubble icon is located in the bottom right corner of the browser window.

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Next Steps

- ▶ Give yourself time – be realistic
- ▶ Evaluate and prepare a summary for management
- ▶ Create an implementation plan
- ▶ Determine how/when you will incorporate testing
- ▶ Continue to stay aware of annual giving trends and tactics



Questions ???



Thank You!