

NONPROFIT SUCCESS WORKSHOP



Integrated Multi-channel Marketing and Fundraising Best Practices

Today's Agenda

- 1) What's driving us to practice multi-channel marketing?
- 2) What specific value do we get from it?
- 3) Planning for a multi-channel strategy
- 4) Executing a multi-channel approach

Multi-channel Engagement


















What are the main factors driving your organization to a more integrated approach?

ACTIVITY 1

Needs for a Multi-channel Approach

- 1) Key donor groups are aging
- 2) Donor files are churning and acquisition list sources are limited
- 3) Revenues are flat and—in many cases—are falling
- 4) Direct mail costs are increasing / fundraising margins are shrinking
- 5) Constituents' expectations are changing

Changing Constituent Landscape

	Matures	Boomers	Gen X
	 <div style="border: 1px solid black; padding: 5px; display: inline-block;">POPULATION 39M</div>	 <div style="border: 1px solid black; padding: 5px; display: inline-block;">POPULATION 78M</div>	 <div style="border: 1px solid black; padding: 5px; display: inline-block;">POPULATION 62M</div>
ANNUAL GIVING	\$\$\$\$\$\$\$	\$\$\$\$\$\$	\$\$\$\$\$\$
DONATED BY CHECK BY MAIL			
PRIMARY CHANNELS	 	 	   
REGULARLY ON FACEBOOK			

Increased Competition

- # of nonprofits is up 43% since 2001
- As of 2006 b.f.* people were receiving over 3k marketing messages a day

This + changing expectations for
channel control = increased cost to
raise one new \$

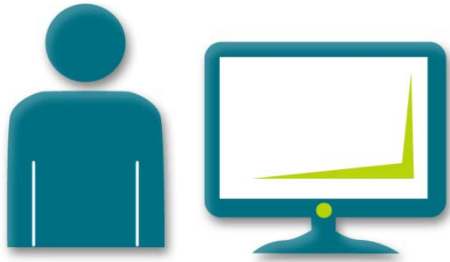
b.f. → before facebook (or before it was big anyway)

The Value: Qualitative



- Integrated Marketing Benefits:
 - Deepens constituent loyalty and increases lifetime value.
 - Strengthens the brand.
 - Engage new audiences, grow revenue, and maybe even save money.
- Audiences **are becoming increasingly multi-channel** and greater data intelligence is required to raise every dollar.

Multi-channel Horror Stories

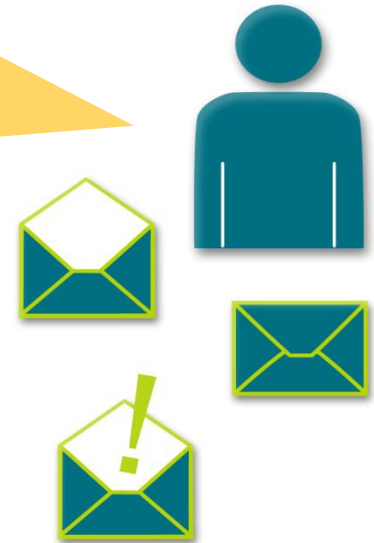


- Major Donor visits website
- Signs up for eNews
- Receives generic emails about volunteer training or appeals to become a donor.



- Event attendee responds to an action alert and makes a gift online
- Receives no follow up to the event
- Receives too many emails including uncoordinated action alerts and appeals

- Member creates a memorial page to honor a loved one and makes a gift
- One week later, receives a telemarketing call asking for renewed support

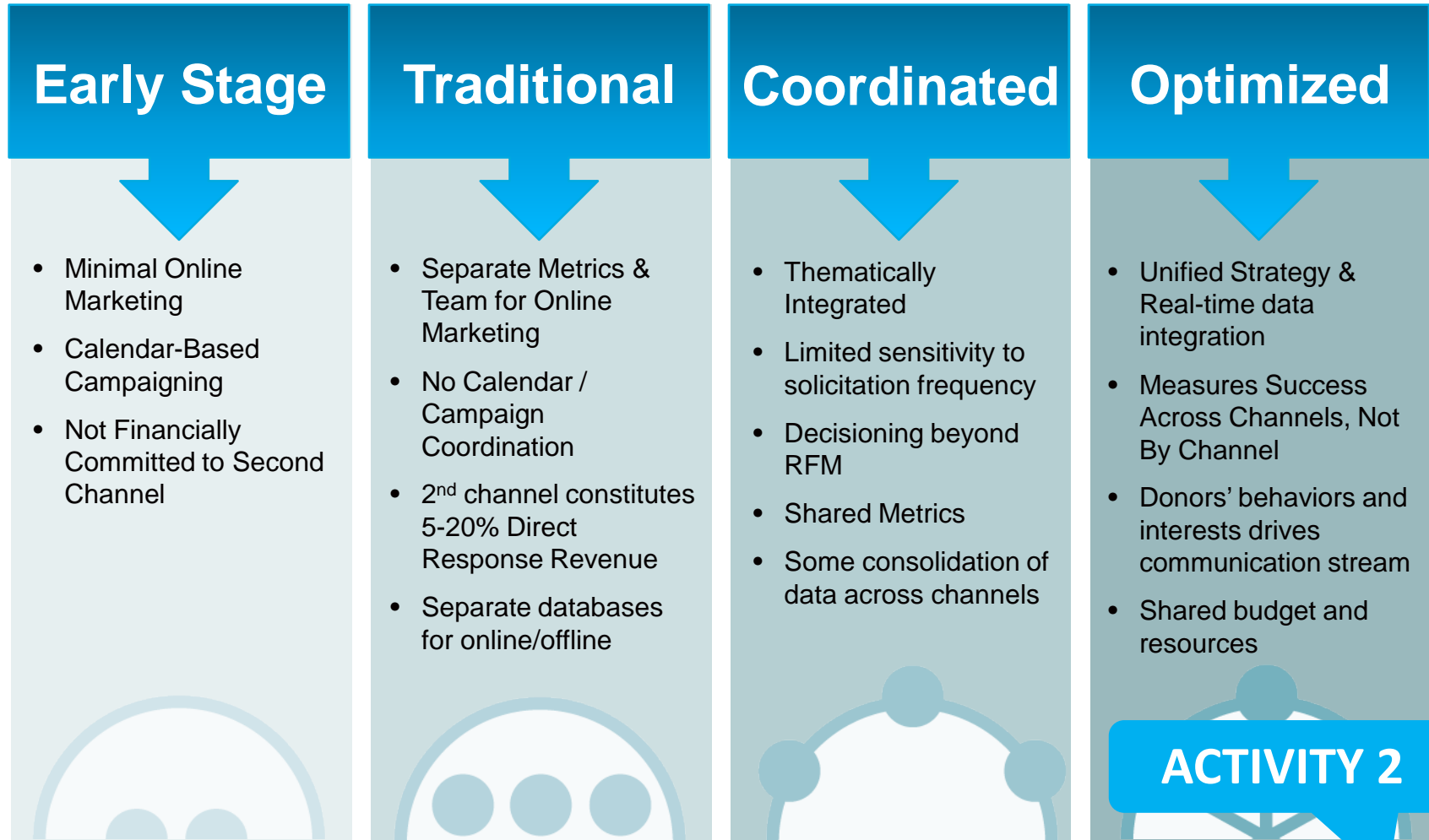


Increasingly Multi-channel Behavior

% say appropriate solicitation channel

	GEN Y	GEN X	BOOMER	MATURE
Mail	77%	79%	74%	77%
Email	76%	69%	60%	51%
Social Media	69%	60%	38%	17%
Phone	51%	42%	39%	34%
Text	38%	25%	16%	13%

Where are you?



ACTIVITY 2

Roadblocks to Success

Two factors that have the **greatest impact** on advancing integrated marketing & communications:

- An organization's / leadership's commitment to the philosophy
- Investing in the mechanics to make it happen

Roadblocks to Success

Absence of these becomes a real barrier to integration.

- An organization's / leadership's commitment to the philosophy
- Investing in the mechanics to make it happen

Roadblocks to Success

Other Roadblocks:

- Limited staff
- Limited budget
- Data everywhere
- Not enough emails
- Don't have a strategy
- Insufficient website

ACTIVITY 3

But what if you could:

- Anticipate your constituents' needs
- Know their interests, passions, and preferences
- Offer more relevant interactions & opportunities to engage

You Would...

- ✓ Improve acquisition & referrals
- ✓ Strengthen relationships
- ✓ Grow support & fundraising

Constituent Engagement

The constituent experience changes



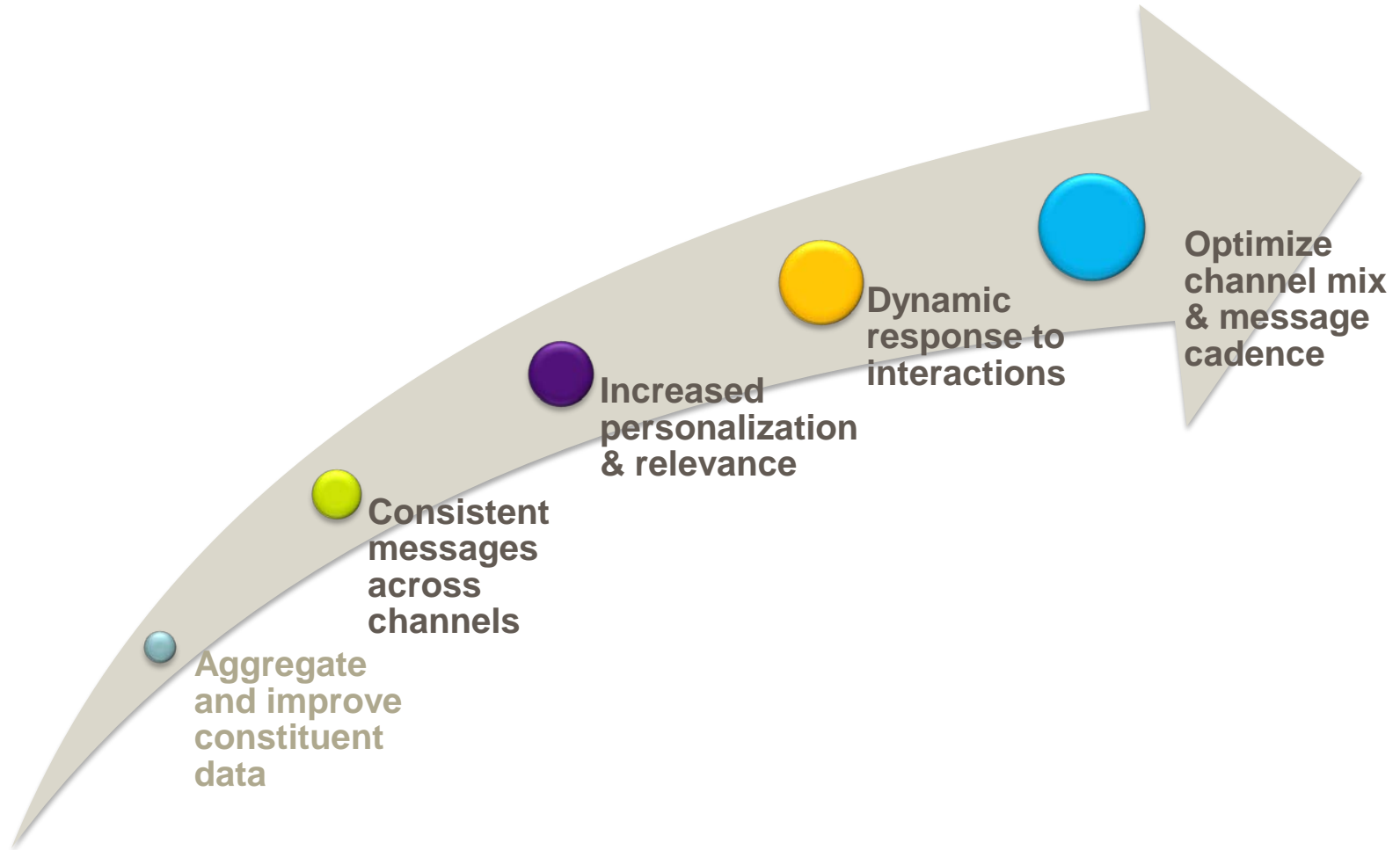
- Disjointed constituent experience
- Fragmented messaging from a variety of channels
- Less engagement

The constituent experience changes



- Unified constituent experience
- Integrated messaging across a variety of channels
- Optimized engagement

Your Evolution Might Look Like This...



Better Engagement & Better Results for You & Your Supporters



Any Solution Must:

- Simplify operations, not add complexity
- Be the right fit for your next 10+ years of growth and change
- Be fully supported – both technically and strategically – by a trusted, expert partner

Comprehensive software and services to grow constituent engagement.

- Dynamic multi-channel engagement
- 360° constituent view
- CRM serving the whole organization
- New insights from your data
- Open & extensible platform
- Strategic partnership

A True Constituent Engagement System

Online Engagement

Content Management

Email Marketing

Fundraising

Advocacy

Special Events

Constituent Management

360 Degree Constituent View

Enhanced CRM

Gift Processing & Batch Management

Pledges & Recurring Gifts

Major & Planned Giving

Event Management

Volunteer Management

Campaign Management

Reporting

Data Warehouse

Visual Business Intelligence

salesforce.com 
Success On Demand™

Multi-channel campaign management

Can build audience in CRM for both online and offline campaigns. Results from online and offline campaigns populate CRM campaign statistics.

Accounts Contacts Donations Pledges Events **Campaigns** Batches Forecasts Chatter Query Analytics +

Campaign Hierarchy **2011 Annual Campaign** [Help for this Page](#)

The hierarchy is created by associating campaigns with parent campaigns.

Campaign Name	Campaign Type	Campaign Status	Active	Campaign Owner
2011 Annual Campaign	Fundraising	In Progress	<input checked="" type="checkbox"/>	Linton Myers
2011 Events	Fundraising	In Progress	<input checked="" type="checkbox"/>	Walt Hamlett
2011 Boston Gala	Fundraising	Planned	<input checked="" type="checkbox"/>	Walt Hamlett
2011 Los Angeles Gala	Fundraising	In Progress	<input checked="" type="checkbox"/>	Walt Hamlett
2011 February Campaign	Fundraising	Planned	<input checked="" type="checkbox"/>	Walt Hamlett
Direct Mail Appeal	Fundraising	Planned	<input type="checkbox"/>	Linton Myers
Email Appeal	Fundraising	Planned	<input type="checkbox"/>	Linton Myers
2011 Japan Earthquake	Fundraising	In Progress	<input checked="" type="checkbox"/>	Tompkins Spann

Campaign **2011 Annual Campaign** [Customize Page](#) | [Full Layout](#) | [Printable View](#) | [Help for this Page](#)

[Show Chatter](#) [Follow](#)

[Campaigns Hierarchy](#) | [Segments](#) | [Open Activities](#) | [Activity History](#) | [Donations](#) | [Attachments](#) | [Campaign Members](#) | [Account History](#)

Campaign Detail [Edit](#) [Delete](#) [Close](#) [Manage Members](#) [Advanced Setup](#) [Manage Campaign Hierarchy](#) [Recalculate Largest Gift](#) [Export List](#)

Campaign Name: 2011 Annual Campaign [View Hierarchy](#) Campaign Owner: [Linton Myers \(Change\)](#)

Active Campaign Type: Fundraising

Parent Campaign: [Appeal](#) Lock Segments Event

Type: Fundraising Strategic Program: [Annual Giving](#) Channel: [Integrated](#) Default Designation: [In Progress](#) Status: [In Progress](#) Description:

▼ Campaign Progress

Campaign Duration: 0.99 Start Date: 1/1/2011 End Date: 12/31/2011

▼ Campaign Performance

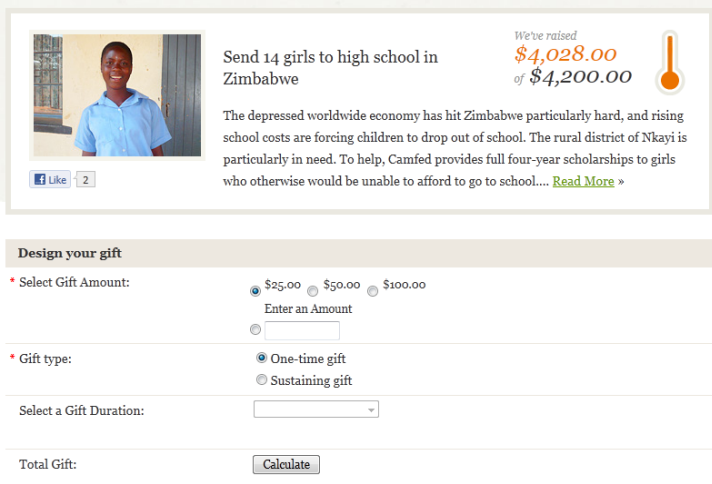
Num. Total Donations: 12	Total Donations in Hierarchy: 28
Num. Won Donations: 10	Total Won Donations in Hierarchy: 26
Total Value Donations: \$185,250	Total Value Donations in Hierarchy: \$220,412
Total Value Won Donations: \$35,250	Total Value Won Donations in Hierarchy: \$78,412
Total Contacts in Hierarchy: 59	Total Leads: 0
Total Contacts: 19	Converted Leads: 0
Expected Revenue: \$5,000,000	Response Rate: 47.5%
Total Responses: 2	Expected Response (%): 0.00%
Largest Gift: \$100,000.00	Average Gift Amount: \$2,800.43
Last Recalculation Date: 7/5/2011 10:58 PM	

▼ Campaign Efficiency

Projected Cost: Cost Per Person: \$42.37

Online Fundraising

- Secure PCI compliant donation forms
- Dynamic ask strings automatically ask donors for appropriate amounts based on giving history
- Open APIs enable donation forms on external platforms like Facebook



This screenshot shows a Facebook fundraising interface. At the top, there is a photo of a young girl and a progress bar indicating that \$4,028.00 has been raised out of a \$4,200.00 goal. The text reads: "Send 14 girls to high school in Zimbabwe". Below this, a paragraph explains the economic challenges in Zimbabwe and mentions "Camfed" providing scholarships. A "Like" button shows 2 likes. Below the main text is a "Design your gift" section with the following options:

- Select Gift Amount:** Radio buttons for \$25.00, \$50.00, and \$100.00, followed by an "Enter an Amount" input field.
- Gift type:** Radio buttons for "One-time gift" (selected) and "Sustaining gift".
- Select a Gift Duration:** A dropdown menu.
- Total Gift:** A "Calculate" button.



This screenshot shows a Facebook page for PETA (People for the Ethical Treatment of Animals). The page features a "Donate Now" banner with a photo of a cat. Below the banner, there is a large photo of a black dog. The text on the page includes:

- Facebook Header:** "facebook" logo and "Email" input field with "Keep me logged in" checkbox.
- Post Header:** "PETA (People for the Ethical Treatment of Animals) • Donate" with a "Like" button.
- Post Content:** "Non-Profit Organization · Norfolk, Virginia", "Donate Now" banner, "International:" with flags, a large photo of a dog, and a "Donate" button.
- Text:** "We need your financial support in order to put a stop to cruelty to animals. Together, we can make the world a better place for all beings. Your donation will go to work instantly to help animals suffering and dying on factory farms and in laboratories, the fur industry, and circuses as well as other forms of 'entertainment'."
- Security:** "VeriSign Secured" logo and "ABOUT SSL CERTIFICATES" link.

Email Marketing

- Robust email platform ensures 95%+ deliverability
- Automated and scheduled deliveries to increase efficiency
- Welcome Series functionality to automatically welcome new constituents



Peer-to-Peer Fundraising

- Used by over 50% of the top fundraising events
- Easy, intuitive tools teach participants the art of fundraising
- Options for fundraising events and individual fundraising efforts
- Over \$1 billion raised in 2010



Pledge and Recurring Gift management

View and manage pledges and recurring gifts that are created either online or offline.

The screenshot shows the 'Recurring Gift' management interface. At the top, there is a navigation menu with options: Home, Campaigns, Leads, Accounts, Contacts, Donations, Recurring Gifts, Pledges, Forecasts, Contracts, Cases, Solutions, and Products. Below the menu, the page title is 'Recurring Gift' and the main heading is 'Raj Raulji \$42.00 Recurring Gift'. A 'Service Center' section contains a 'Recurring Gift Amount' field set to '\$42.00' and a 'Next Payment Date' field set to '1/1/2012'. There is a 'Skip Next Payment' button and 'Save' and 'Cancel' buttons. On the left, there is a 'Search' section with a search bar and a 'Limit to items I own' checkbox. Below that is a 'Recent Items' list with several entries for Raj Raulji's recurring gifts.

The screenshot shows the 'Kirsten Myers \$100000.00 Pledge' detail page. The page title is 'Kirsten Myers \$100000.00 Pledge'. The 'Pledge Detail' section includes fields for Pledge Name, Account, Contact, Start Date, Pledge Status, Pledge Amount, Benefit Value, Tax Deductible Amount, Number of Payments, Campaign, Primary Classification, and Description. The 'Status Summary' section shows 'Payments Received' (2), 'Amount Received' (\$50,000.00), 'Pledge Amount (Rounded)' (\$100,000), 'Payments Outstanding' (3), 'Amount Outstanding' (\$50,000.00), 'Plan Status' (Ahead of Plan), and 'Pledge Payment Status' (\$10,000.00). The 'Recurring Information' section shows 'Write-in Designation' and a table of 'Total Pledged Amount: 100000.00' with columns for 'Designation', 'Amount', and 'Total Amount'. The table lists 'Cancer Research' as a designated amount of \$100,000.00, which is designated.

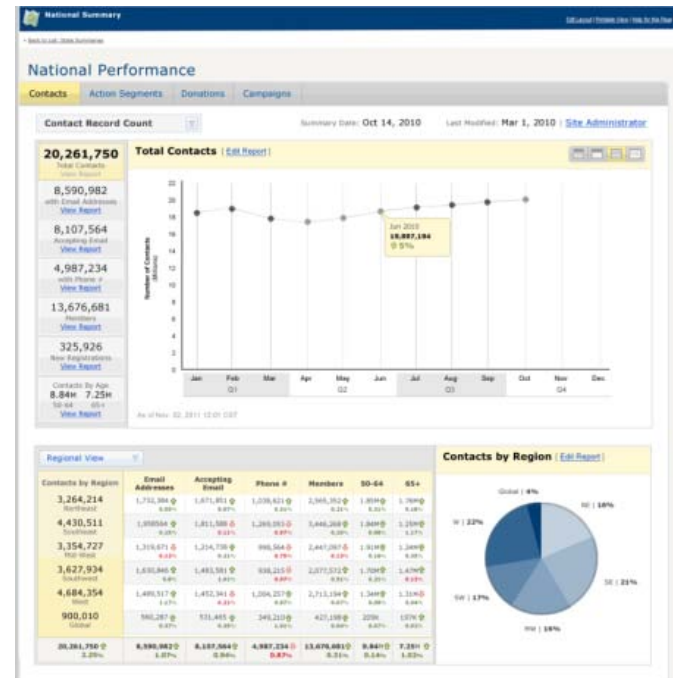
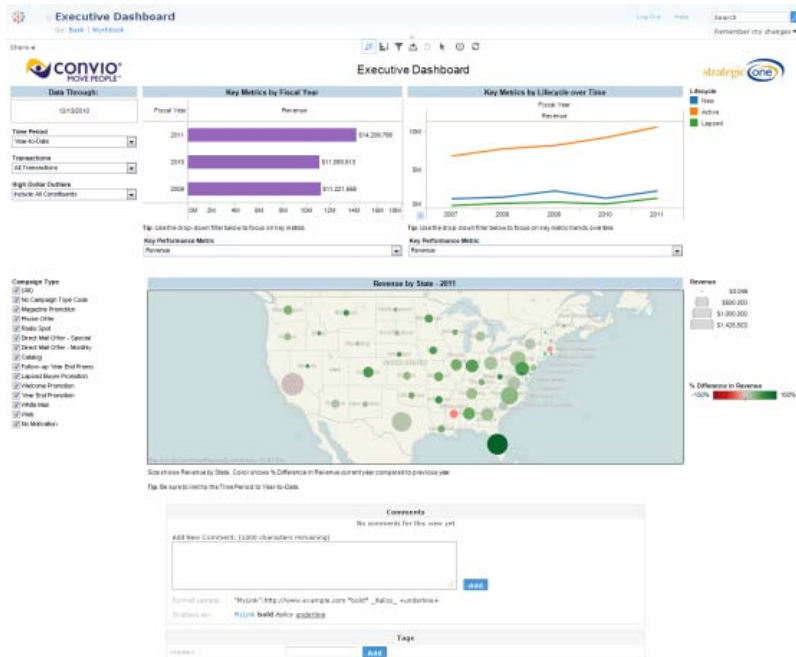
List Builder

Visual query builder designed to pull both online and offline data to formulate a campaign audience.

The screenshot displays the Convio List Builder interface. On the left, there are two panels: 'Filters' and 'Saved Queries'. The 'Filters' panel is divided into 'Constituent' and 'Household' sections. Under 'Constituent', there are filters for 'Donation Specific' including Donor Role, Number of Donations, Payment Type, Record Type, Single Donation Amount, Total Donation Amount, and Transaction Type. The 'Saved Queries' panel shows 'My Queries' and 'All Queries' with a list of queries like 'NE Gala', 'NW Gala', 'SE Gala', and 'SW Gala'. The main workspace shows a visual query builder for 'Untitled Query 1' in 'Region One'. At the top, it shows '1,449 Identified' and '-1,874,569 Excluded' constituents, with a 'Save' button and icons for 'Copy', 'View', 'Export', 'View SQL', and 'Settings'. Below this, it displays '1,876,018 Constituents' and '1,328,192 Households'. The query is built using a flowchart of filters: 'Global Omits' (1,707,150 Identified, -168,868 Excluded) is connected to 'Donation Date' (648,717 Identified, -1,058,433 Excluded) via an AND connector. This is then connected to an OR connector. The OR connector branches into two paths: one with 'Mailing City' (3,243 Identified, -645,474 Excluded) and 'Single Donation Amount' (778 Identified, -2,465 Excluded) connected by AND; the other with 'Mailing City' (2,581 Identified, -646,136 Excluded) and 'Single Donation Amount' (671 Identified, -1,909 Excluded) connected by AND. At the bottom, there are two dashed boxes with the text 'Add Filter or Query here.' and an 'OR' connector between them. A '0 Overlap' indicator is visible at the bottom of the query flow.

BI Reports and Dashboards

Integrated Business Intelligence reporting and dashboards.



Planning a Strategy

Key Concepts for Multi-Channel Marketing:

- Constituent Centricity
- Presence in Multiple Channels
- Thematic Integration
- Integrated Process
- Integrated Measurement and Business Intelligence

Constituent Centricity

- Align processes and communication to respect constituent preferences, needs and interest.
- Tailor channel mix, content and program participation and message frequency base on their selections and behavior.
- Ask the question “What matters to a constituent?”

Understand Preferences, Needs and Interests




SACRAMENTO
SPCA



The Sacramento Society
for the Prevention of
Cruelty to Animals

[Home](#) | [Contact](#) | [Hours & Location](#) | [Employment](#)

[Calendar](#) | [About Us](#)


**Join Our Online
Community!**

Adopt A Pet

- Before You Adopt
- Adoption Procedure
- Pet Request Program
- View Adoptable Pets

Pet Care/Behavior

- Obedience Classes
- Pet Behavior Help

Thank you and welcome!

We appreciate your interest in the Sacramento SPCA. Please provide your full contact information below so that we can stay in touch:

* = required field

Please tell us if you are a cat person, a dog person or both!

- Both Cat & Dog Person
- Cat Person
- Dog Person

[View Missing Pets](#)

Home > Join the Cause

Registration

Please provide your contact information below:

Title:

First Name:

Last Name:

* Email:

Street 1:

Street 2:

City:

State / Province:

ZIP / Postal Code:

Phone Number:

Yes, I would like to receive e-mail from MitoAction
Email Format:

Yes, I would like to receive postal mail from MitoAction

What is your primary connection to Mito?

How did you find MitoAction?

What type of support do you need most?

May others contact you for support?

Please select response

Comments

Please select the areas of interest for which you would like to receive occasional email from us.

- Adult patient, parent or family member of someone with Mito
- Annual Family Walk & Awareness Event
- Clinician, social worker, teacher who works with Mito patient(s)
- Community advocate or friend of a person with Mito
- Legislative Advocacy and Call to Action Alerts
- Mito 411 Volunteer Team
- MitoAction Monthly News (our most frequent email option - don't miss a thing!)
- Other
- Quarterly Updates (our least frequent email option)
- Researcher, scientist, biotech

What is your primary connection to Mito?

How did you find MitoAction?

What type of support do you need most?

ACTIVITY 4

Content is King





Forward to a Friend

SPCA breaks records/saves:



With your contribution Sacramento SPCA breaks record number of life saved in 2009.

Thanks to you:

- The Sacramento SPCA's high-visibility campaign **altered a record-breaking 16,609 animals found new, loving homes.**
- The SPCA was once again honored by Reader's Digest magazine as the **Best Place to Adopt** for our more than **1,300 dedicated adopters.**
- More than **10,000 vaccinations** administered at our low-cost vaccination clinics.
- A record **1,200** sick, underage animals were cared for and placed in loving foster families;
- Over **7,000** children benefited from our pet education programs;
- Nearly **3,000 people and their families** benefited through obedience classes, a free private behavior consultations;
- More than **1,000 animals** were placed in over-burdened California animal loving homes.

We couldn't have achieved any of these milestones without you! We thank you for your support and we look forward to an exciting 2010 at

With much appreciation,



Forward to a Friend | Donate | www

In This Issue

Free Arts youth artwork transforms Twin Cities' streets with colorful murals; Mayor R.T. Rybak declares March 27 Arts Minnesota Day; Learn how your organization can be involved to help Free Arts Minnesota youth.

Metro Murals: Takin' Art to the Streets



Murals created by Free Arts youth and families are brightening city streets throughout the Twin Cities. The murals were created to raise awareness for Child Abuse Prevention month and encourage families to make health choices together. Check them out and see them in-person!

Free Arts Minnesota Day



In recognition of the service of Free Arts and the work of our volunteers, Mayor R.T. Rybak declared Saturday, March 27, 2010 as Free Arts Minnesota Day. The proclamation was celebrated at our Metro Murals event at Midtown Global Market.

[more >](#)

Child Abuse Prevention



We would like to thank CBCC, Colleen McVoy and Midtown Market for making the Metro Murals project possible. Many other individuals and organizations have invited us to raise for Free Arts Minnesota.

[more >](#)



For people passionate about Algonquin Park.

Forward to a Friend | Donate | Visit our web site

May 2010

Donate Now

Tell A Friend

Earliest Spring Ever in Algonquin!

This spring was the earliest in the last 50 years, and perhaps ever, in Algonquin Park. Nearly all the snow was melted by Easter Weekend. Lake Opeongo (Algonquin's largest lake) is usually the last to lose its ice, about April 29 on average. This year the ice went out on April 7, beating the previous earliest date of 12 April 1981. Wood Frogs and Spring Peepers were first heard on April 2, several days earlier than ever before. The first spring wildflowers typically come into bloom in mid to late April, but the first flowers were reported on April 4 this year.

A Love of Birds: Doug Tozer's Algonquin Park Bird Research



The lakes, forests, and trails of Algonquin Park serve as a major research laboratory for approved researchers.

Discover more about Doug Tozer, former Algonquin Park Naturalist, and current bird researcher with Trent University and the Ontario Ministry of Natural Resources and his "Love of Birds". To explore more about Algonquin Park as a location for research check [The Science Behind Algonquin's Animals](#). Video by Hugo Kitching (also a former Algonquin Park Naturalist) and Terry John Myers. [Learn more >](#)

Fundraising Raffle

The Friends of Algonquin Park Fundraising Raffle is showcasing 15 outstanding prize packages for 2010. There are three canoes up for grabs plus many other valuable prizes to raise funds for The Friends of Algonquin Park. Tickets will be available mid-May and can only be purchased in person. Please show your passion for Algonquin by purchasing your tickets during your next visit to the Visitor Centre or Logging Museum! [Learn more >](#)

For people passionate about Algonquin Park

The FOAP is a non-profit charity dedicated to fostering a greater appreciation for Algonquin Park.

Visitor Centre is open daily from 9 am to 5 pm

Algonquin Logging Museum opens June 26, 2010

Stay tuned for The FOAP newsletter...coming soon!



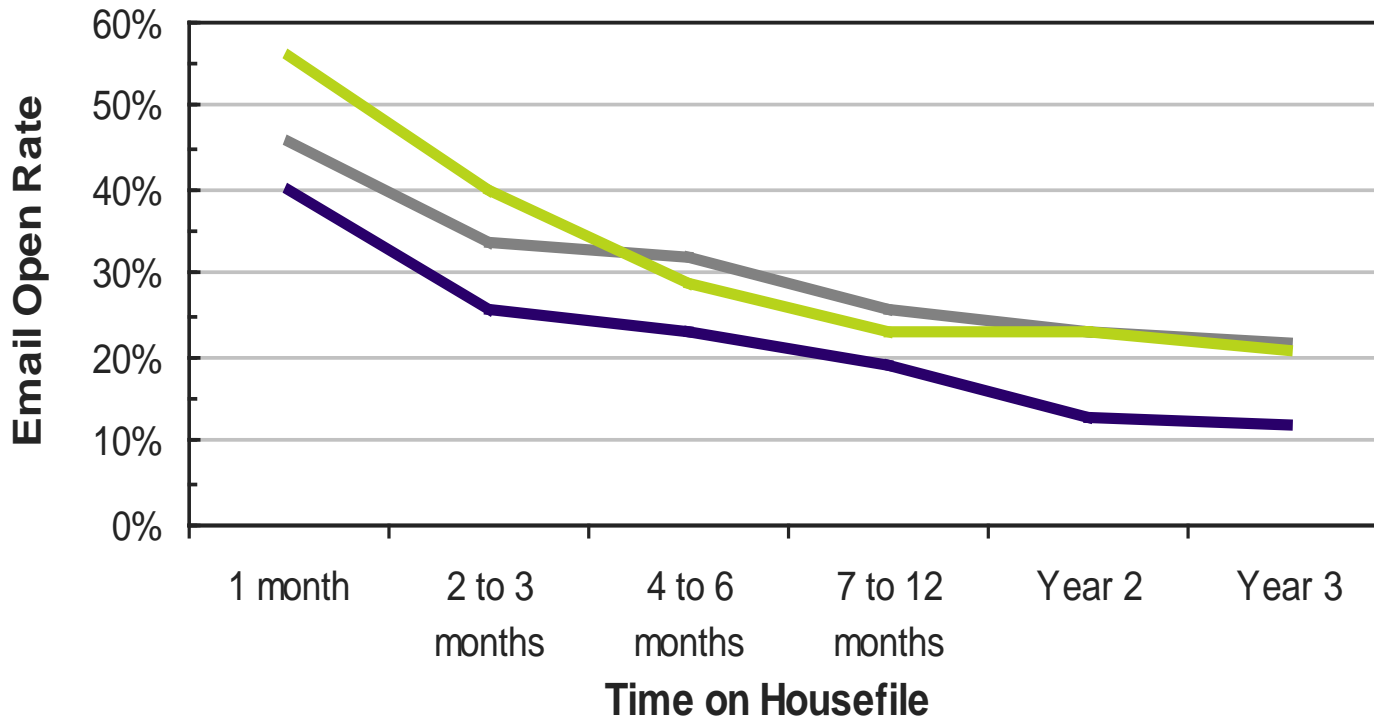
Visit us on YouTube



Join The Friends of Algonquin Park on Facebook

Welcome in a timely manner

Lean on established **best practices** to get the most results from technology



Automated Welcome Series



Dear Jennifer,

Welcome to Chicago Children's Museum's new online community! I want to thank you for your interest in the museum and for joining us in making a difference in the lives of the children and families we serve.

Soon, you will start to receive our monthly updates with fun, educational activities for your entire family to try at home, information on our upcoming exhibits and programs, and much, much more!

In the meantime, we do hope you'll come and play with us at the museum! [Check out our website](#) for more information on our upcoming programming.

Once again, thank you for your interest in Chicago Children's Museum. Your connection to the museum adds depth and spirit to our community, and your support allows CCM to remain an essential family resource, a safe play space, and a vibrant learning laboratory.

Warmly,

Jennifer Farrington
President and Chief Executive Officer

From the desk of



Jennifer Farrington

[Donate Now](#)

[Tell A Friend](#)

BECOME A MEMBER!

Receive unlimited access to CCM's hands-on exhibits and programs for an entire year - and save money!



Dear Jennifer,

Visit CCM: Come and visit Chicago Children's Museum today! Explore our three floors of hands-on exhibits and programming fit for children and caregivers alike. Go to [our calendar](#) to check out our upcoming schedule of activities.

Get Involved: We want you to become the next CCM volunteer! As a volunteer you get to work directly with the children and families we serve each and every day. Apply to become a CCM volunteer today: [Volunteer Application](#) »

Make a Donation: Your generosity allows Chicago Children's Museum to be a special place where children can create, play, touch, and grow—laying the foundation for a lifelong love of learning. Donating has never been easier! Use this link to visit our site and make an online donation today: [Donate Now](#) »

Spread the Word: You can tell your friends and family about the great work we're doing for children and the important adults in their lives! Use this link to send a message about CCM today: [Forward this message to your friends](#) »

Warmly,

Jennifer Farrington
President and Chief Executive Officer

From the desk of



Jennifer Farrington

[Donate Now](#)

[Tell A Friend](#)

BECOME A MEMBER!

Receive unlimited access to CCM's hands-on exhibits and programs for an entire year - and save money!

ACTIVITY 5

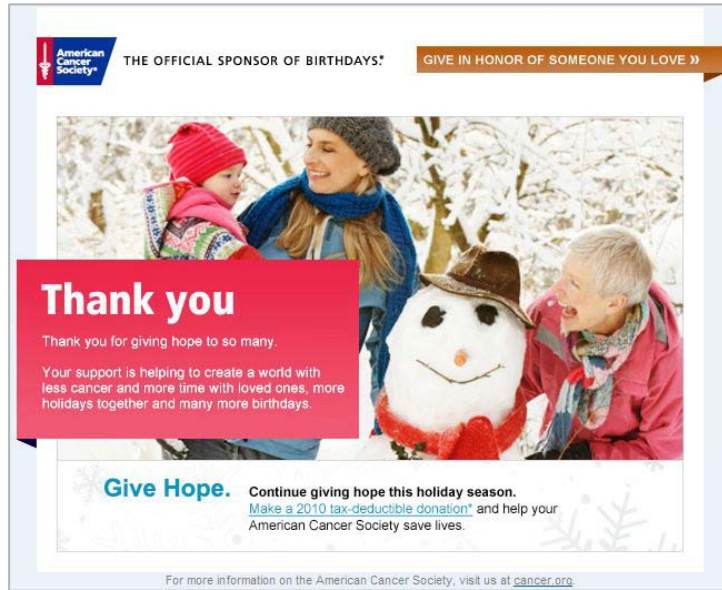
[Unsubscribe](#) | [Forward to a friend](#) | [Visit our web site](#)



[Unsubscribe](#) | [Forward to a friend](#) | [Visit our web site](#)



Conditionalize Content



A Single Email with
Conditional Content

Thank you

Thank you for giving hope to so many.

Your support is helping to create a world with less cancer and more time with loved ones, more holidays together and many more birthdays.

Donor Version

Enjoy

The American Cancer Society wishes you and your family a holiday season of health and happiness.

Your support — and your own story of hope — is creating a world with less cancer, more time with loved ones, more holidays together, and many more birthdays. Thank you

Survivor Version

Build Profiles from Behaviours

CONVIO LUMINATE

Search All... Search

Tompkins Spann Help & Training Luminate CRM

Home Reports Analytics Accounts Contacts **Donations** Pledges Recurring Gifts Events Campaigns Batches Duplicate Management Utilities Resource Center +

Create New...

Recent Items

- Tommy Spann \$35.00 Recurring Donation 07/16/2011
- Tommy Spann
- Tommy Spann \$345.00 Pledge
- Justin Clark
- Alex Oliver
- Tommy Spann Annual Fund Campaign \$ 115.00 on 2011-07-14T16:3...
- (1480) Status: Active
- Tommy Spann \$225.00 Single Donation 07/14/2011
- Tommy Spann Household
- Edward Pease \$15.00 Single Donation 07/12/2011

Custom Links

Messages and Alerts

Recycle Bin

Donation Tommy Spann \$35.00 Recurring Donation 07/16/2011

Show Chatter Follow

Open Activities (0) Activity History (0) Stage History (1) Reversed Designations (0) Notes & Attachments (0)

Donation Detail Edit Delete Clone Sharing

Donation Name	Tommy Spann \$35.00 Recurring Donation 07/16/2011	Donation Record Type	Recurring Donation [Change]
Account Name	Tommy Spann Household	Type	Individual Gift
Donor	Tommy Spann	Primary Classification	
Donation Owner	luminate2 BusUser [Change]	Probability (%)	100%
Amount	\$35.00	Donation Series Description	
Benefit Value	\$35.00	Tribute	
Tax-Deductible Amount	\$0.00		
Close Date	7/16/2011		
Stage	Received		
Primary Campaign Source	Annual Fund Campaign: Annual Fund (1240) Status: Active		
Segment Code			
Recurring Gift	Tommy Spann \$35.00 Recurring Gift		
Record ID	DON-0049		
Description	Recurring Payment 1		

▼ Payment Information

Payment Type	Credit Card	Posted	<input type="checkbox"/>
Credit Card Type	Visa	Posted Date	
Bank Name		Reversed	<input type="checkbox"/>
Check Number			
Check Date		User Confirmation Code	802-1201-3-7530-7759

▼ Honor/Memorial Designation

Honor/Memorial Type		Honoree Name	
Honor/Memorial Notification Method		Honor/Memorial Person(s) to Notify	<input type="checkbox"/>
Honor/Memorial Notification Address		Honor/Memorial Notification Email	
Honor/Memorial Notification Date			
Honor/Memorial Message			

▼ Recognition Preferences

Mark as Anonymous	<input type="checkbox"/>	Recognition	<input type="checkbox"/>
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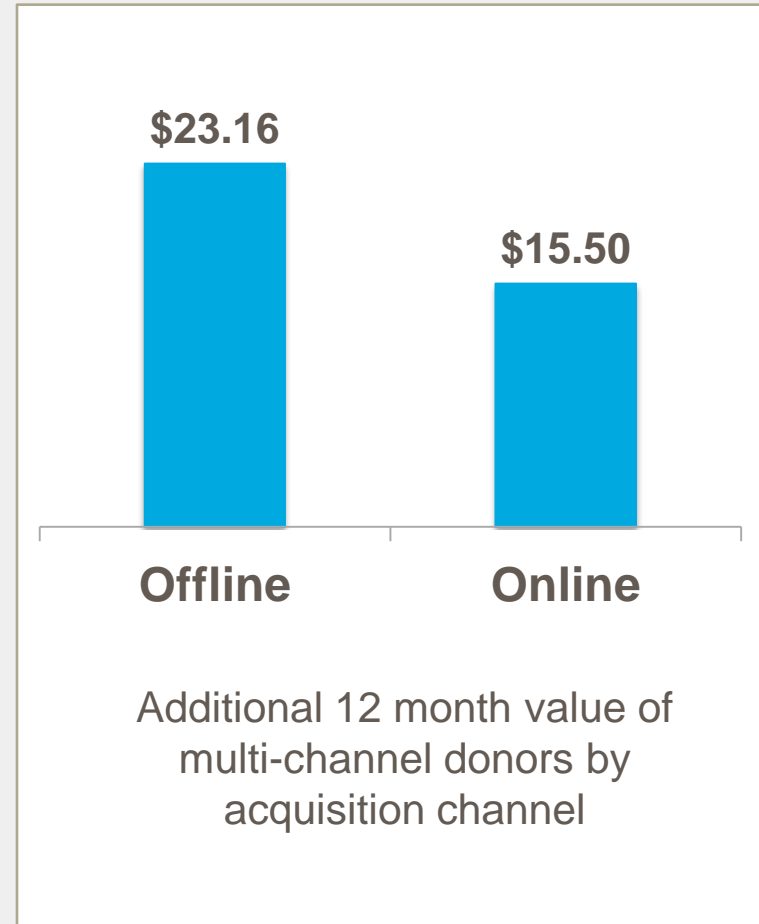
Presence in Multiple Channels

- Consider multiple if not all channels for every campaign you have
- Cross-Channel Messaging – collect cross channel contact information
- Online and Offline
- Using Social Media
- Acquisition techniques

Challenges:

- Understand value of online vs. offline acquired donor
- Validate multi-channel approach

Results



Mail and Email

**Answer a Prayer
Change a Life**

Francis House
Rehabilitation Center

You Can Help

Every day, more than 800 poor and homeless people come to St. Francis House for help. With your support, they can leave homelessness behind.

DONATE TO ST. FRANCIS HOUSE ▶

GIVE \$25 ▶ Provide a guest with a winter coat, clean, new socks and underwear, or appropriate clothes for a job interview, and you give an extra-special gift, too: an

GIVE \$65 ▶ More than half of our guests have mental health issues. Provide an hour of professional mental health counseling to ease a guest's troubled mind.

GIVE \$125 ▶ Finance one day of our Moving Ahead Program, including temporary housing, for a student committed to finding meaningful employment and achieving independence.

GIVE \$500 ▶ We recently served a record-breaking 500 breakfasts in a single day. Serve a delicious, nutritious breakfast to everyone who comes through our doors one

Ask Email from Three-Part Welcome Series

**ST. FRANCIS HOUSE
2007 Annual Fund
TO FIGHT HOMELESSNESS**

100% of your gift goes to support the 2007 Annual Fund to Fight Homelessness.

- Give generous, tax-deductible meals for 25 guests.
- Send help (clothes, new coats) to protect them from the elements.
- Gift clean, new coats of warm, clean coats, socks, and underwear for guests.
- Other: _____

For it is in giving that we receive
— Acts 20:35

2007 Annual Fund SUPPORTER

Ms. Jane Sample
1000 Main St.
St. Louis, MO 63101

Offline Proof of Direct Mail Piece

**ST. FRANCIS HOUSE
2007 Annual Fund
TO FIGHT HOMELESSNESS**

Your donations at work:
Every dollar counts in the fight against homelessness.

- Give \$25** - Send a guest to the store and receive one night of meals, socks, and underwear.
- Give \$65** - To provide 1 hour of professional mental health counseling to ease a guest's troubled mind.
- Give \$125** - To finance one day of our Moving Ahead Program, including temporary housing, for a student committed to finding meaningful employment and achieving independence.
- Give \$500** - To serve a delicious, nutritious breakfast to everyone who comes through our doors one

Ms. Jane Sample
1000 Main St.
St. Louis, MO 63101

Online Appeal Complements Direct Mail Piece

Integrated Strategy and Welcome Series: St. Francis House

Make it FUN to donate: Donation API's

CARE package
EST. 1946

meet the women and girls | build your own CAREpackage | create a group CAREpackage | join a group CAREpackage | share with friends & social networks | view CAREpackage progress

Already created or joined a group CAREpackage? [Log in here](#). Otherwise, please [register now!](#)

Build your own CAREpackage

- help her *Live*
 - Equip a Birthing Center**

\$465 can provide a birthing center with essential medical supplies and equipment to help ensure healthy deliveries.
 - Provide Transportation to the Hospital**
 - Train a Health Worker**
 - Ask Congress to support comprehensive health care**
 - Join the CARE Action Network**
- help her *Learn*
- help her *Earn*

Your gift supports CARE's global mission to relieve poverty. [Read more here.](#)

How much would you like to contribute?

\$5 ————— \$1000
\$500

Donating \$500 can equip 1 birthing center!

cancel contribute!

inside your CAREpackage(1): \$5

send your CAREpackage

Make It EASY to Donate Online

VOLUNTEER
ADVOCATE
SPREAD THE WORD
SHOP THE STORE
DONATE NOW
Search

Donation Management

Online Giving | Donation Classic | Pending

Annual Fund Campaign > Annual Fund > Donations

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
- a. Donation Form
4. Validate
5. Configure Autoresponders
6. Test Drive
7. Publish

Warning!

The Form Designer Add, Remove, ...

Select data element

Share

Our Issues

- Health & Wellness
- Nutrition
- Prescription Drugs
- Patient Rights
- About AHS
- Online Media
- Online Community
- Resource Library
- Affiliates
- Events
- Canadian Health Society

Become a Member \$1/day membership level is now available

1. Progress
2. Condition
3. Log On

Transaction processing is not live. Payment Disabled=TRUE. Transaction Mode=TEST_GOOD

1 Gift & Payment Information **2** Review Gift

Annual Fundraising Campaign - Health For Life

Use this form to make a secure, tax-deductible donation to the American Health Society, supporting AHS health programs worldwide - selected from suggested giving levels or any amount you can give will help make our world a healthier one. If you prefer, [print a form](#) to send your donation by mail or call 1.800.4AHS to donate by phone.

*Select Gift Amount:

\$35.00

\$65.00

\$100.00

*Gift type:

One-time gift

Sustaining gift

Select a Gift Duration: Lifetime(Monthly)

Total Gift: Calculate

Billing Information

*First Name:

*Last Name:

*Street 1:

Street 2:

*City:

*State/Province: OR - Oregon

*ZIP/Postal Code:

Country: United States

*Email Address:

Yes, I would like to receive communications from this organization.

How did you hear about AHS? Friend

Payment Information

*Select a Payment Type: Credit Card

Credit Card Type:

*Credit Card Number:

*CVV Number: What is this?

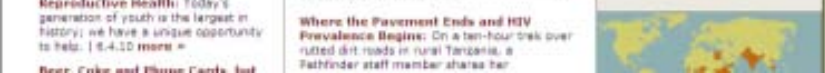
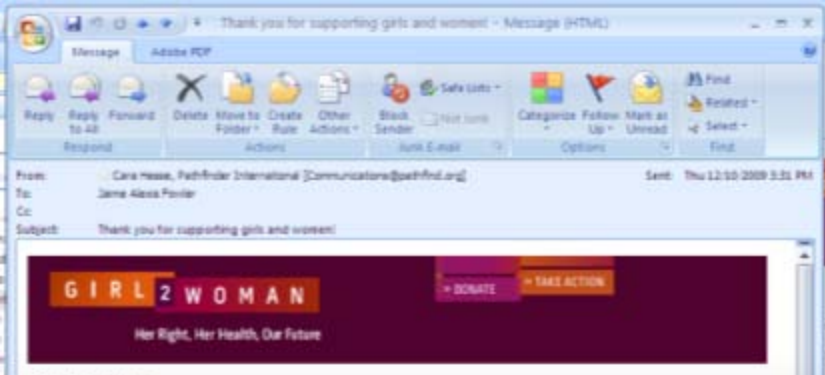
*Expiration Date: 08 / 2011

NextCancel

Helps provide basic medical needs to low-income families

Online and Offline Best Practices

- Include URL as a way to respond online
- Track mail recipients who donate online
- Create a reference about the appeal on your homepage



ms_wilson what if every woman had choices about her reproductive health care—and her future? <http://ow.ly/2PgzG> via @pathfinderint
1,286,364,935,000.00 via HootSuite
Retweeted by Pathfinderint

Pathfinder International Lots of excitement today! Our Facebook supporter who offered the challenge of \$300 if we reached 300 Twitter followers just gave her gift! Because of the matching gift campaign, it will be matched for a total of \$600! Many thanks to Kristen for her generosity and for all of you sharing Twitter with friends and family! ...
See More
October 5 at 6:12pm · Comment · Unlike · Promote

You, Elias Feghali, Kate Schaffer and Tobi Indykz like this.

View all 7 comments

Cindie Carroll-Pankhurst I am already a Milestone Club - but wish you tons of luck with your current campaign!
October 5 at 10:35pm · Like · Flag

Pathfinder International Patricia, thanks so much for your gift! And Cindie, many thanks for being part of our Milestone Club. We really appreciate both of you for your ongoing support—and comment on Facebook!
October 6 at 12:17pm · Like

Write a comment...

Pathfinder International Exciting news: This month a donor will match all gifts made online prior to October 29th--up to \$50,000! Meet Esther, a young woman in Tanzania, and see why your choice to give will provide more choices for women around the world.

Pathfinder International News: Make a Choice to Give a Choice
www.pathfind.org
This week Pathfinder International launched a matching gift challenge: Make a Choice to Give a Choice. During October, a generous anonymous donor will match every gift made online--up to \$50,000!

October 5 at 1:20pm · Comment · Unlike · Share · Promote · Flag

You and 9 others like this.

Write a comment...

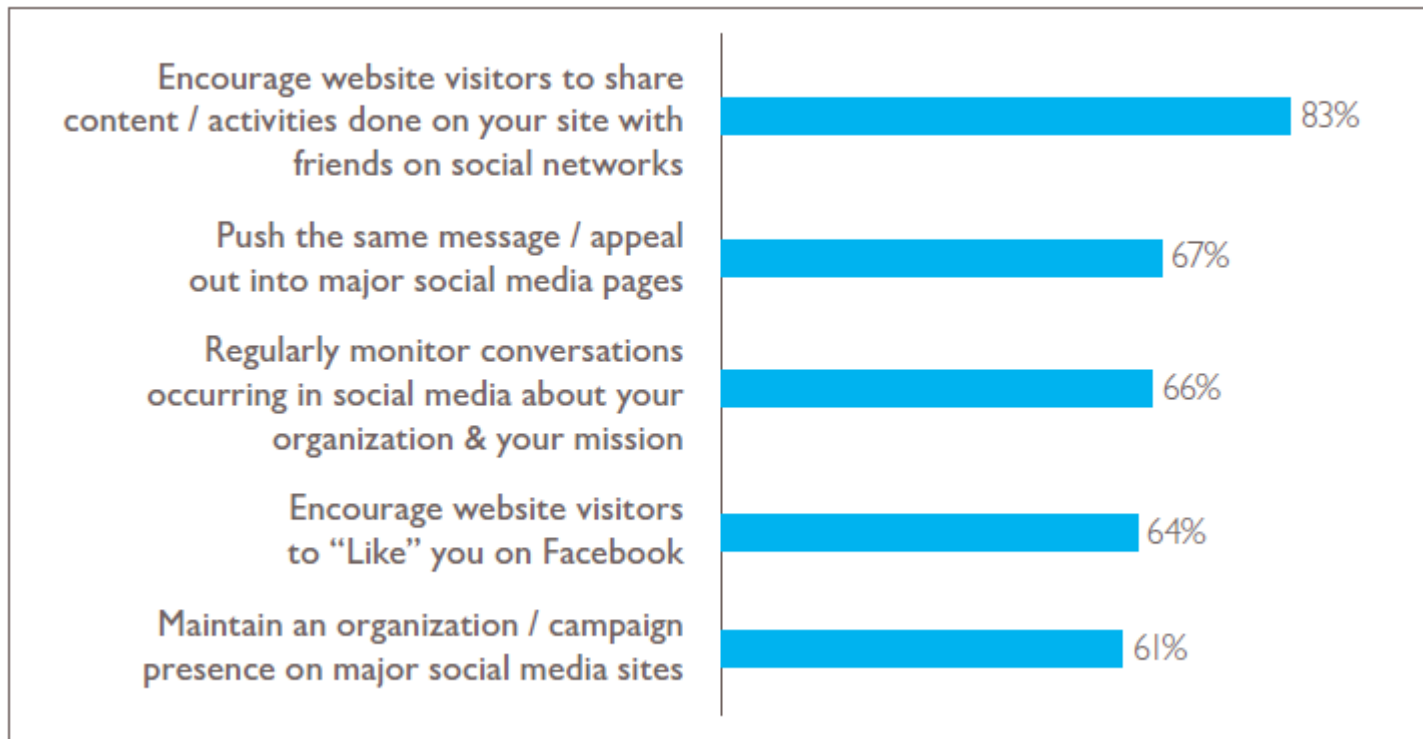
Pathfinder International Just 25 followers away on Twitter from reaching 300...and getting \$300! That can help us train 3 community health workers in basic family planning services in India.

Special Events: AIDS/Lifecycle

- Used 2 separate Team Raisers on one instance of Convio to foster competition between cities
- Organizations collaborated to promote the event
- Leveraged social networking, great visuals and storytelling
- Provided participants with tools and gave them freedom to make the event their own
- Raised \$10.5 million exceeding their fundraising goal even during tough economy



Percentage Who Currently Use Social Media Best Practices



ACTIVITY 6

Online and Offline Acquisition Techniques

Basic Ask

Pledges

Give-Aways

Downloads

Sponsored Donations

ACTIVITY 7

Thematic Integration

- Have a consistent theme across all channels for your campaign.
- Use supporting images and messages to tell your story.

WWF Tiger Emergency Update

WWF
TIGER EMERGENCY UPDATE
 URGENT DISPATCH * * * * * AUGUST 2008

Dear Friend,

I am writing to you with an urgent update about tigers.

As I'm sure you are aware, tigers are among the world's most endangered animals. In the last century, the population of wild tigers has declined by 95% over the last century. Only three distinct sub-species of tiger known to be alive today: Amur tigers, Indochinese tigers, and Bengal tigers. Until recently Bengal tigers, which have the largest range, were considered a conservation success story with a thriving, even growing population. However, recent news has recently been released that the population of Bengal tigers in India, which was estimated at over 3,300 just five years ago, is now about 1,400 — and falling fast. This news raises the frightening prospect that wild tigers could become extinct in our lifetimes.

Here are some facts about tigers you need to know:

You are the LAST, BEST HOPE for the survival of endangered animals like the tiger!

Can I count on your financial support today?

With your help WWF has led many of the most successful efforts in tiger conservation, including last year's announcement of two new parks in Russia to preserve crucial habitat for the Amur tiger.

World Wildlife Fund
 125 Twenty-Fourth Street, NW • Washington, DC 20037
 worldwildlife.org

TIGER EMERGENCY REPLY
 HELP WWF SAVE THE SUMATRAN TIGER!

YES! You can count on me to help WWF's global conservation efforts, including saving the critically endangered Sumatran tiger. I'm making my emergency contribution of \$_____

**If we receive your gift of this amount or more in the next 10 days, we'll rush you FREE WWF plush to you I indicate your choice below

Limited Edition WWF Case! * Plush Panda
 Limited Edition WWF Case! * Plush Bear
 Limited Edition WWF Case! * Plush Tiger

World Wildlife Fund
 125 Twenty-Fourth Street, NW

Offline appeal and envelope

Integrated tiger appeal results show 40% better response rate

Having trouble reading this email? Please visit WWF's website. I Have a question? Contact us

TIGER EMERGENCY UPDATE

Dear First Name WWF Member,

I hope you've had a chance to look over the urgent tiger dispatches I sent you last week.

By now, I'm sure that you are aware of the dire situation that tigers currently face: these majestic animals could become extinct in our lifetimes if we don't **take action**.

Today, while tigers face many threats, including the loss of critical habitat, the single greatest threat is poaching for their fur, bones, and internal organs. **Aggressive and illegal tiger trafficking threatens to hasten the tragic extinction of one of the world's most magnificent animals.**

Here are some of the ways WWF is fighting tiger trafficking with our wildlife trade network:

TRAFFIC:

- We're conducting daring undercover investigations to find the places where tiger parts are sold and track them back to the source.
- We're using advanced tracking and mapping to give governments the information they need to put traffickers in jail.
- We're ratcheting up pressure on China to urge them not to lift their 15-year-ban on domestic trade in tiger bone.

And we're working to save tigers in other ways:

With help from friends like you, we're preserving habitat and protecting tiger prey species. We're also leading the Terai Arc Landscape Project to protect

You are the LAST, BEST HOPE for the survival of endangered animals like the tiger!

Online appeal, included envelope image

Fundraising: Defenders of Wildlife

- Members demanded the organization raise awareness on vice presidential candidate's record on aerial wolf hunting
- Multi-channel campaign drew attention to the candidate's environmental record & raised funds
- Raised \$1.3 million online and \$150,000 via phone



Dear van,

We're getting the word out to voters about Governor Sarah Palin's barbaric record on killing America's wildlife, especially her active promotion of the brutal aerial hunting of wolves and bears.

Since Defenders of Wildlife Action Fund released our hard-hitting wolf slaughter last week...

potential voters have read our email
potential voters have viewed the video on
ny more spread the word by re-posting the
sites and blogs and forwarding it to

ews outlets have picked up the story,
Defenders of Wildlife Action fund and our
Defenders of Wildlife.

ands of swing voters who will help decide
a powerful new television spot detailing
ll wo
lay.

Put Palin's Wolf-killing Record on TV



We need to raise \$100,000 in the next week to put our new ad on the air on television stations in Ohio and support wildlife-saving efforts across the country. Will you help?



Ashley Judd, Broadway, Hollywood and indie film star

[Please help protect threatened polar bears and expose Sarah Palin's terrible record before Election Day with this powerful new television ad! Donate now...](#)



Integrated Process

- Use right combination or sequence of messages or touch points across channels to optimize response and long-term impact.
- Message frequency management – integrated fundraising/communications calendar.

Multi-Part Campaigns

1



Make a Gift Today

Dear Friend,

[Make a promise to 17,000 children](#)

Every day, families are battling commitments. This holiday season, we are served by Boys & Girls Clubs.

[Make a gift today](#) and help us provide a safe place for children in metro Atlanta.

During these tough economic times, families face greater struggles than ever before. Parents not only worry about gifts for the holidays, but also about how they can put food on the table. When times are good, the struggles are less visible, but when times are bad, the struggles are more apparent.

Can they count on you for a miracle?

At Boys & Girls Clubs, we never turn a child away. We provide the support and resources that children need to thrive. They can find the love of friends. They can find the love of learning. They can find the love of life. They need the promise that we will fulfill our promise to them. All children deserve that.

Your support is even more important. Children will turn to their Club for help. They will be overjoyed because I know the child. We will fulfill our promise to them. We will support our friends like you.

[Make your gift today](#) to help us provide the life-saving programs our children depend on all year long.

To the children, your gift makes a difference. It makes a difference in the lives of Boys & Girls Clubs of Metro Atlanta this season.


Sincerely,
Will Tipton



Happy Holidays

Donate Now
Forward to a Friend

3



Make a Gift Today

Dear Friend,

Today is your last chance to [give a gift](#) and make a promise to 17,000 children in metro Atlanta. Your gift today is tax-deductible for 2008.

We can deliver on this promise by raising the funds needed to provide a safe place with caring adults - a place where our children can be empowered to develop the skills and character they need to become happy and productive adults.

The impact of our donors is clear.

- Boys & Girls Club Kids and Teens:
- Graduate from high school at a rate of 87%, compared to the national average of 66%.
- Show an average improvement of 12% in their grades at school.
- In Club neighborhoods, incidences of teen pregnancy and substance abuse arrests are cut by as much as 50% and
- More than 57% of Club alumni surveyed said that the Club *saved their lives*.

Please send in your [thoughtful gift today](#) to help us provide the life-saving programs our children depend on all year long.

As always, thank you for your continued support of our mission and programs.

Sincerely,
Will Tipton

Jerry Tipton
President
Boys & Girls Clubs of Metro Atlanta

good cheer, and every joy of the season.

Thank you for your continued support. Together, we are saving lives in metro Atlanta.

Integrated Calendar

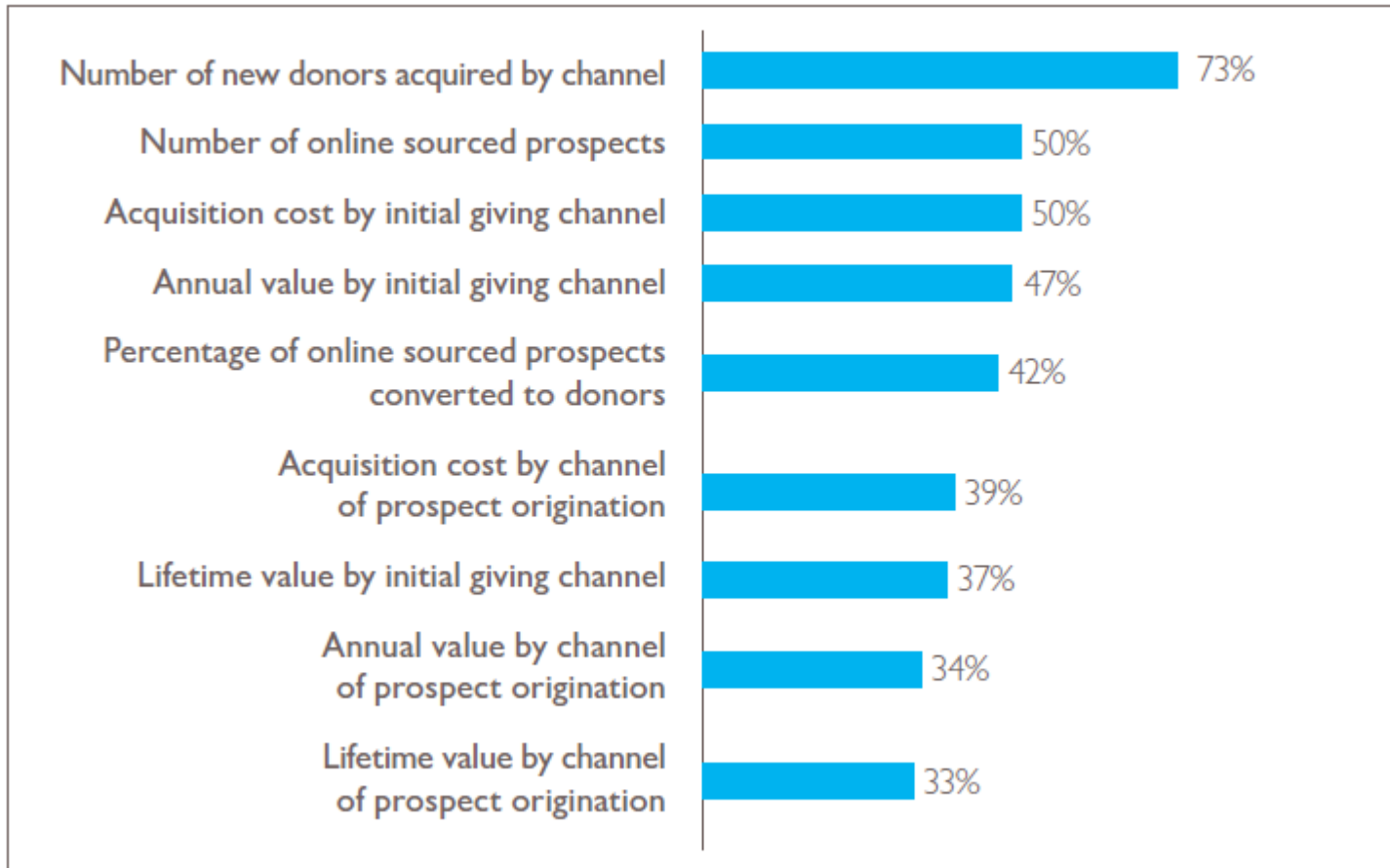
Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 fundraising	2	3 marketing	4 grassroots	5	6 volunteers	7
8	9 marketing	10	11 fundraising	12 marketing	13	14 volunteers events
15 fundraising	16	17 marketing	18 grassroots	19	20 volunteers	21
22	23 marketing	24	25	26 fundraising marketing	27	28 volunteers events
29	30 fundraising	31 marketing	Feb 1 grassroots	2	3 volunteers	4

ACTIVITY 8

Integrated Measurement and Business Intelligence

- Establish metrics that measure donor behavior and campaign performance across channels which focus on long-term value.
- To optimize constituent engagement you need to be able to collect aggregate constituent data to correlate and extract meaningful information that you can leverage to create campaigns.

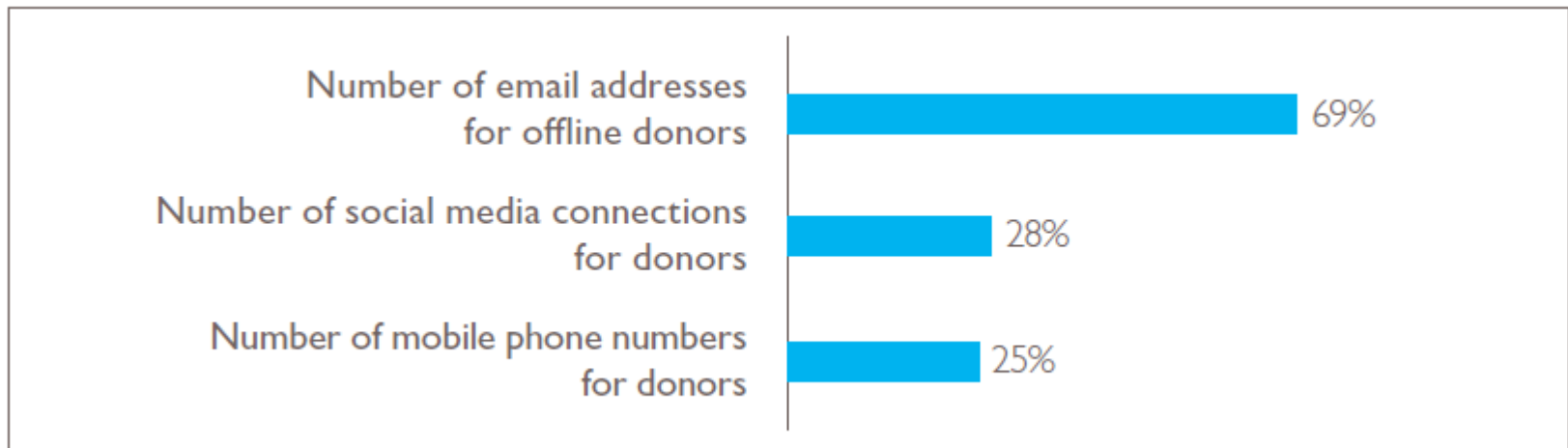
Key Acquisition Metrics Currently Tracked



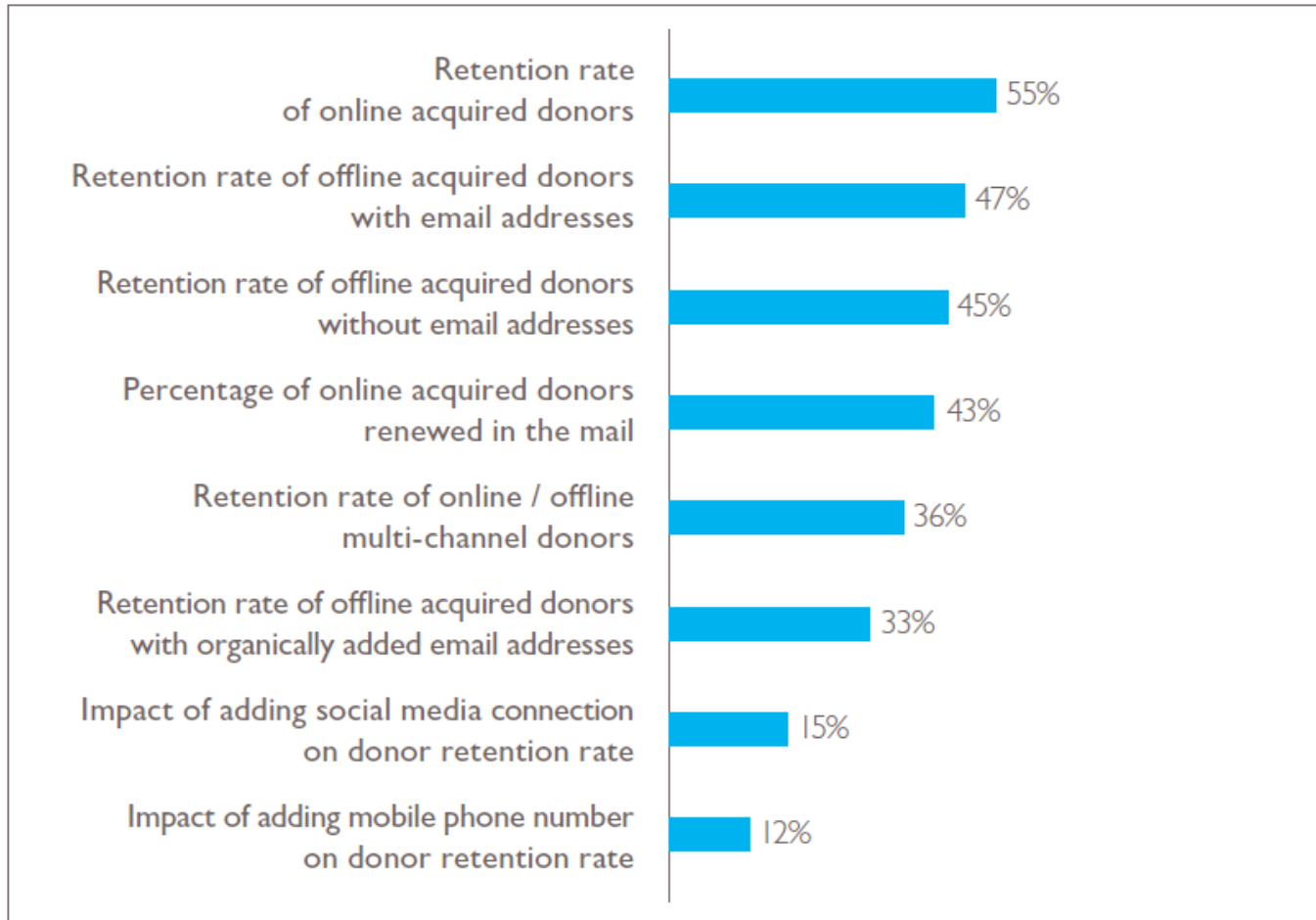
Donor Value By Channel Currently Tracked




Cross-Channel Contact Information



Tracking of Retention Metrics



Campaign Performance



Tompkins Spann | [Help & Training](#) | Luminate CRM

Home Reports Dashboards Chatter Accounts Contacts Donations Pledges Events Volunteer Jobs Batches Campaigns Utilities +

Messages and Alerts

Congratulations on a successful 2010! We exceeded our fundraising goals! Here's to a prosperous 2011.

[Edit Message and Alerts](#)

Shortcut

[Unresolved Items](#)

Recent Items

- [2010 Annual Campaign](#)
- [Alex Oliver](#)
- [Phillip Knight](#)
- [Acme Corporation \\$10000.00 Single Donation 07/13/2011](#)
- [Acme Corporation](#)
- [Acme Corporation](#)
- [Acme Corporation \\$1500.00 Single Donation 07/13/2011](#)
- [Alex Oliver Household](#)

[Create New...](#)


Quick Help

[New Features!](#)

[Connect to Ground Community v3.0](#)

Rabbit Phone

[Make / Receive Calls](#)



Campaign

2010 Annual Campaign

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)


[Show Chatter](#) [Follow](#)

[Back to List: Custom Home Pages](#)

[Campaign Hierarchy \(5+\)](#) | [Segments \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(1\)](#) | [Donations \(5+\)](#) | [Attachments \(0\)](#) | [Campaign Members \(1\)](#) | [Approval History \(0\)](#)

Campaign Detail

[Edit](#) [Delete](#) [Clone](#) [Manage Members](#) [Advanced Setup](#) [Manage Campaign Hierarchy](#) [Recalculate Largest Gift](#) [Export List](#)

Campaign Name	2010 Annual Campaign View Hierarchy	Campaign Owner	 Linton Myers Change
Active	<input checked="" type="checkbox"/>	Appeal	<input type="checkbox"/>
Parent Campaign		Lock Segments	<input type="checkbox"/>
Type	Fundraising	Event	<input type="checkbox"/>
Strategic Program	Annual Giving		
Channel	Integrated		
Default Designation			
Status	In Progress		
Description			

▼ Campaign Progress

Campaign Duration	0.99	Start Date	1/1/2010
		End Date	12/31/2010

▼ Campaign Performance

Num Total Donations	108	Total Donations in Hierarchy	138
Num Won Donations	78	Total Won Donations in Hierarchy	108
Total Value Donations	\$4,615,267	Total Value Donations in Hierarchy	\$4,659,762
Total Value Won Donations	\$3,765,475	Total Value Won Donations in Hierarchy	\$3,809,970
Total Contacts in Hierarchy	3	Total Leads	0
Total Contacts	1	Converted Leads	0
Expected Revenue	\$5,000,000	Response Rate	4,600.0%
Total Responses	1	Expected Response (%)	0.00%
Largest Gift	\$2,500,000.00	Average Gift Amount	\$27,608.48
Last Recalculation Date	4/21/2011 10:17 PM		

▼ Campaign Efficiency

Budgeted Cost	\$12,000	Cost Per Piece	\$5,000.00
Actual Cost	\$15,000	Cost Per Dollar Raised	\$0.00
		Cost Per Response	\$108.70

Executing a Strategy

Key Concepts for Executing Multi-Channel Marketing:

- Organizational Alignment
- Technology

Organizational Alignment

- All teams must work together as a cohesive unit rather than individualized efforts.
- A common theme is to have all communications under one leader.
- Aligning staff and structure to better support integrated/multi-channel efforts.

Organizational Structure

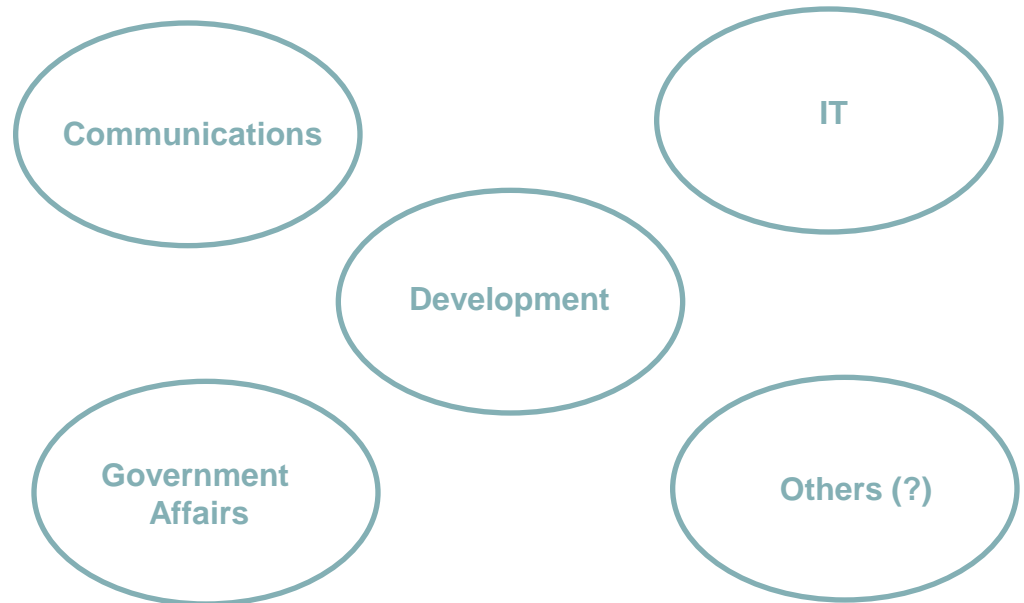
Traditional



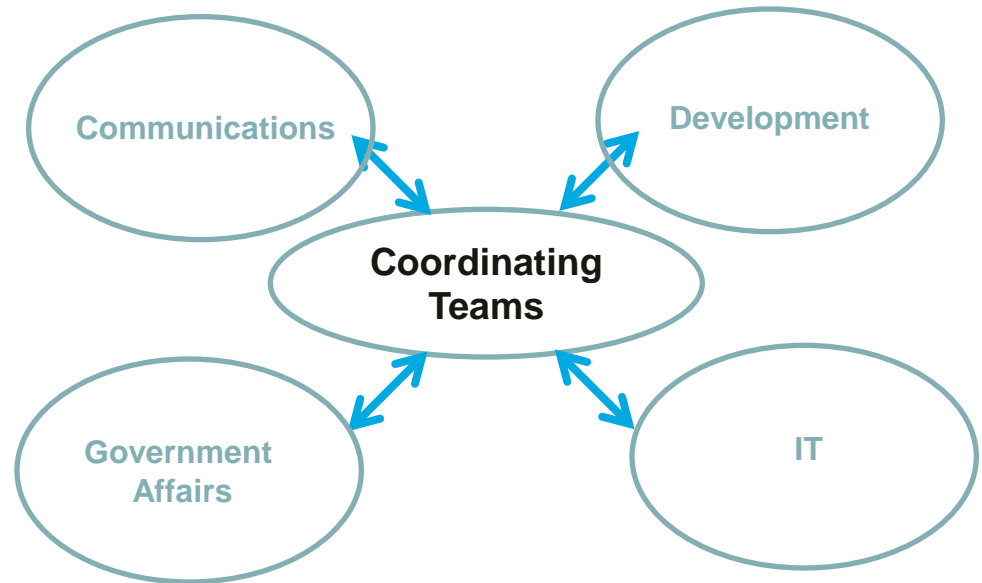
Separate Metrics & Team
for Online Marketing

Disparate (Sometimes
Conflicting) Goals

Inconsistent Voices
Representing Organization



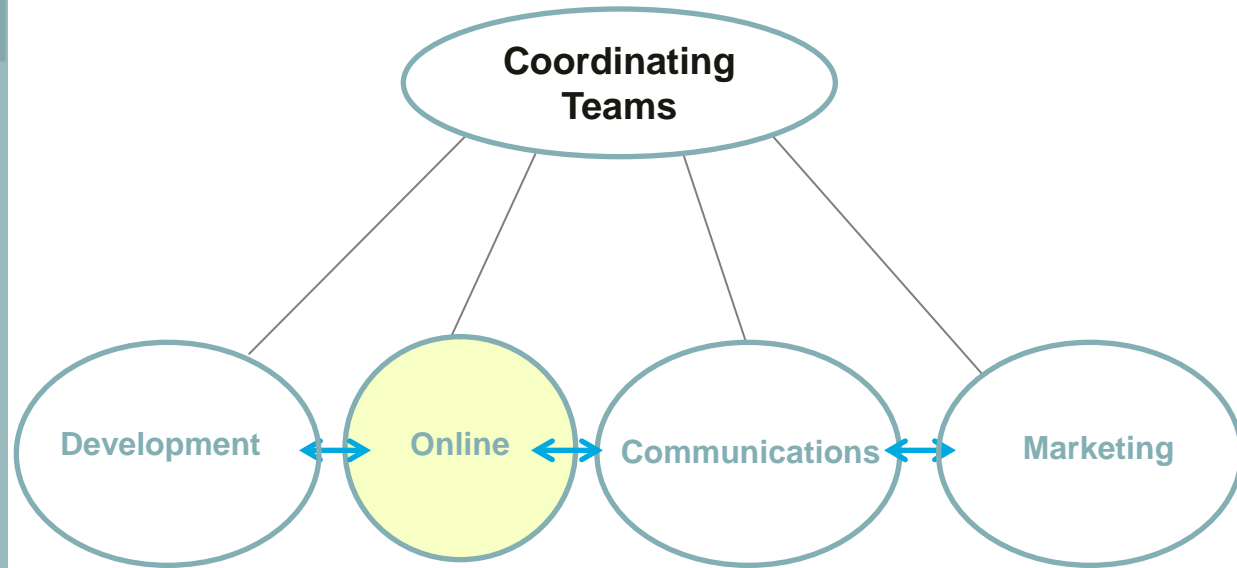
Organizational Structure



Organizational Structure

Optimized

Unified Strategy & Full
Integration Across
Channel Managers



ACTIVITY 9

Technology

- Systems and the technology you use are an essential part of the process.
- Integrate online and offline systems.
- Data bases with easy integration, should be able to support contacts through new media channels.

Infrastructure Needs / Limitations

Support Business Units



Track Performance



Understand Data



Coordinate Departments



Add New Channels



Integrate Systems



Goal: 360-degree View



- **Complete membership**
- **Complete history information**
- **Complete history to key touch points**
- **Site visits**
- **Custom information**

Data Integration Nirvana

visit bgca.org

Welcome Molly!

Every day, whether we are watching or not, a kid grows up. Not every kid is fortunate enough to have equal access to education, healthy lifestyles and positive social modeling. Boys & Girls Clubs of America believes success is within reach of every child and aims to help all youth, especially those who need us most, to achieve his/her dreams.

Did you know only 70% of our nation's youth graduate from high school? Boys & Girls Clubs help kids grow up smart, strong and healthy by providing a safe positive environment, supportive relationships with adults and peers, fun, opportunities, high expectations and recognition. Join with Boys & Girls Clubs of America to help every child reach success. [Learn more now.](#)

Roxanne Spillett
Roxanne Spillett
President & CEO

HELP KIDS TODAY!
Here are 3 easy ways you can get involved with Boys & Girls Clubs of America today:

SUPPORT OUR MISSION.
Our mission is to enable all young people, especially those who need us most, to reach their full potential as productive, caring, responsible citizens. Every one of us has a role in ensuring that every child—regardless of circumstance—has the opportunity to excel. [Donate today.](#)

TELL A FRIEND ABOUT US.
Boys & Girls Clubs are in every state and on military bases overseas in more than 4,300 communities across the country. The more support Clubs receive, the greater their impact on youth served. [Share an invitation.](#)

FIND A CLUB.
Learn more about Boys & Girls Clubs by locating

visit bgca.org

Living Proof

Donald Washington
BGCA National Spokesperson
An Alumna of Boys & Girls Club of Mt. Vernon, N.Y.

Donald Washington

DONATE NOW

"Of the 19 boys in my school class that were my friends, only two are still alive. The rest died of drug overdoses, auto accidents or committed suicide. The two of us that are still alive are the only ones that belonged to the Club."

— Club alumnus Roy G.

You Can Change the Life of a Child

Boys & Girls Clubs of America has time-tested programs, trained professional staff and experience that has provided more than a century of hope and opportunity for youth, enabling them to reach their full potential as productive, caring and responsible adults.

No one knows the true value of Boys & Girls Clubs better than Club alumni. A 2007 survey of former Club kids found that despite challenges faced by some, many alumni thrive. In the United States, 30% of high school students do not graduate on time. In contrast:

- 90% of Club alumni graduate high school;
- 92% of alumni said their Club experience taught them that helping others is a priority; and

BILLING INFORMATION

Title:

• First Name:

• Last Name:

Suffix:

• Street 1:

Street 2:

• City:

State/Province:

• ZIP/Postal Code:

Country:

• Email Address:

Yes! Please send me e-mail updates about how my gift is helping.

Remember Me

PAYMENT INFORMATION

Credit Card Type: VISA MASTERCARD AMERICAN EXPRESS DISCOVER

• Credit Card Number:

• CVV Number: [What is this?](#)

• Expiration Date: /

Appropriate cultivation processes can be automated for all points of entry.

Data flows into one system, so you control who gets what messages, when.

Interactions are connected. Processes are streamlined. More actions are completed.

Summary – Key Tips

- Don't be intimidated
- Do more online and become pros at basic online-offline integration before you invest in new media channels.
- Establish the right key metrics
- Align your organization
- Ensure your systems enable your strategy
- Test, test and test.

Current Landscape



- Disjointed constituent experience
- Fragmented messaging from a variety of channels
- Less engagement

Engaging Constituents with Convio Solutions



With Convio Luminate:

- Unified constituent experience
- Integrated messaging across a variety of channels
- Optimized engagement

Convio Clients...

COMMUNICATE



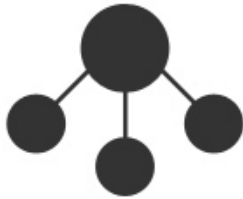
RAISE MONEY ONLINE



INFLUENCE



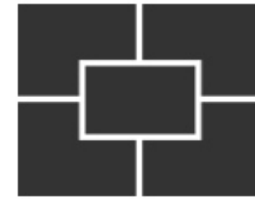
Sky's the Limit: Convio Open



APIs
Customize Convio



Downloads
Extending your reach



Web Services
Synchronize with Convio

More than technology – expert services

Convio has a wealth of information on the industry, and shares their knowledge with a consistent focus on helping us achieve our goals. Convio's approach works well to ensure that we are able to learn and adopt the latest best practices.

Elizabeth Nielsen



CFRE Certified



- Full participation in Convio's **Nonprofit Success Workshop** is applicable for 3.5 education points in Category 1.B – Education of the CFRE International application for certification and/or recertification

Let's talk. Connect with us.



ConnectionCafe.com



Twitter.com/Convio



Facebook.com/ConvioInc



YouTube.com/ConvioInc



Slideshare.net/Convio

NONPROFIT SUCCESS WORKSHOP



Thank you for attending!

Next Steps: Today's presentation along with additional free resources that will help your organization execute a multi-channel strategy will be sent to you via email.

In the meantime, visit www.convio.com