



FOURTH ANNUAL  
**Convio Summit**  
November 16-18 **2009**

# TeamRaiser Next Steps

April Davis - Convio

Jonathan Drennan - Charity Dynamics

Dario Mallerma & Nicole Aubry – YAI

Bethany Bauman – American Diabetes Association

# Agenda – Maximizing TeamRaiser

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- Tactics For Effective TeamRaiser Marketing
- Engaging Coaching Emails
- TeamRaiser Blueprinting
- Event Management Center
- Fundraising Milestones
- Personal Gift Icon
- Appealing Participant Stationery

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# Tactics for Effective TeamRaiser Marketing

Jonathan Drennan, Senior Consultant  
Charity Dynamics

# Tactics for effective TeamRaiser marketing

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- Start early
- Design your event's website with viral marketing in mind
- Phone calls
- Promote and utilize your social networks
- Maximize your Participant Center
- eCommunication
  - Recruitment/Retention
  - Coaching/Engagement
- Coaching Email features

# Tactics for effective TeamRaiser marketing

## ■ Starting early

- ▶ Take advantage of your current year's momentum!
  - Can participants sign up year-round?
- ▶ If website isn't ready, can you direct them to a simple registration survey and collect their information?
  - Administrator upload when site is ready
  - "First to be asked" email when site is ready
- ▶ Early registration =
  - More time to fundraise
  - More time to recruit
  - More time to spread the word

# Tactics for effective TeamRaiser marketing

- Design your event's website with viral marketing in mind
  - ▶ Forward to a friend link in your Pagewrapper
  - ▶ Event eCards
  - ▶ AddThis or other bookmarking/sharing tool

The image shows a website for 'MAKING STRIDES Against Breast Cancer' with a navigation menu on the left containing 'Make a Gift', 'Forward to a Friend', 'FAQ', and 'Contact Us'. The 'Forward to a Friend' link is highlighted with a red box. The main content area features the American Cancer Society logo and a navigation bar with 'Home', 'Event Information', and 'Fundraising Resources'. Below this is a section for 'Send a Making Strides E' with sub-links for 'Making Strides eCards', 'Fundraising Tips', and 'Matching Gifts'. On the right, an 'AddThis' sharing menu is open, showing options for Email, Print, Digg, MySpace, Facebook, Twitter, Favorites, Delicious, Google, Live, StumbleUpon, and a 'More...' button with 171 additional options. The 'SHARE' button at the top of the menu is also highlighted with a red box.

# Tactics for effective TeamRaiser marketing

## ■ Phone calls

### ▶ Who to call...

- Team leaders
- Top fundraisers
- Company coordinators
- Past participants who didn't participate last year
- Participants directly touched by mission (ex: survivors)

### ▶ Listen!

- How can you make participation and fundraising easier for them?
- Why do they choose to support your event?

## ■ Share inspiring stories with your participants *and* your callers

## ■ Use your volunteers!



# Tactics for effective TeamRaiser marketing

- Promote and utilize your social networks



## New Blog to Focus on Central Park Challenge!



In the blogosphere, we have recently launched our brand-new [Central Park Challenge blog](#), with up-to-the-minute event information, photos and more! [Click here to sign up and subscribe for updates!](#)

## Tag Your YAI Photos on Flickr!

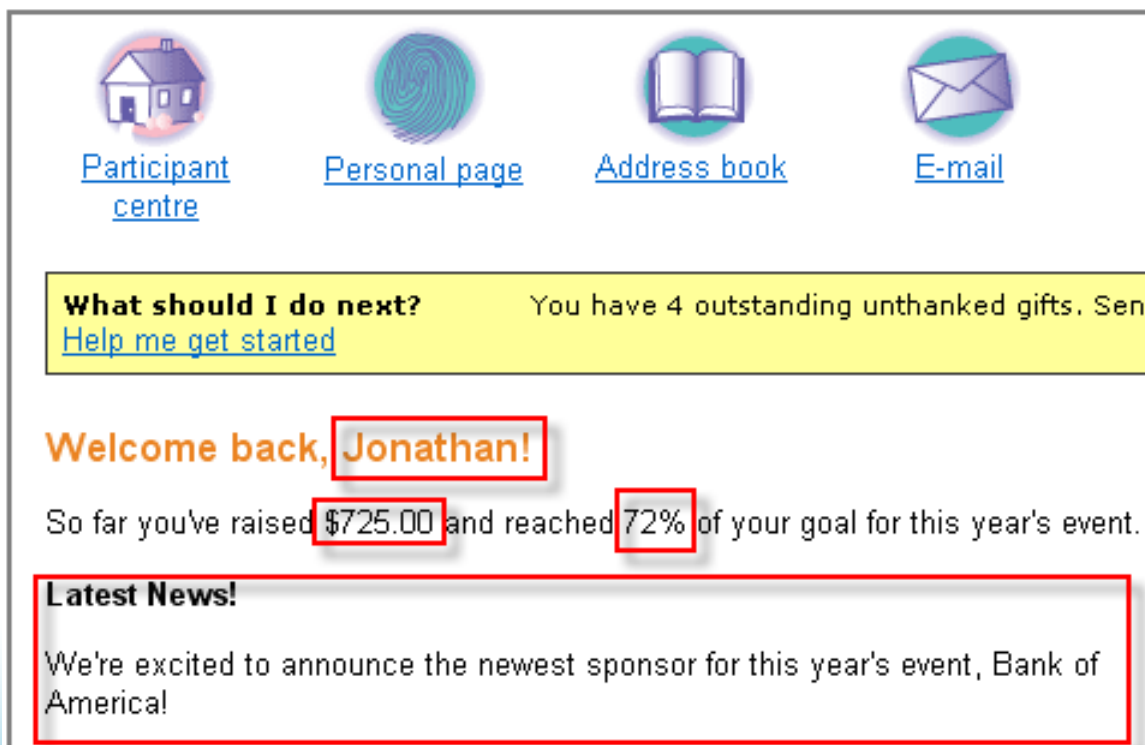


Post your photos of last year's Central Park Challenge on [Flickr](#) for everyone to see. Tag them as "YAI CPC" and you may see your photo on our Facebook Fan Page or our blog!



# Maximize your Participant Center

- Using...
  - ▶ Dynamic updates via personalization and conditionals
  - ▶ Manual updates
    - Keeping the content fresh and engaging keeps participants coming back
    - Coordinate Participant Center with your coaching emails, and use them as a 'teaser'



The screenshot displays a user interface for a Participant Center. At the top, there are four navigation icons: a house for 'Participant centre', a fingerprint for 'Personal page', an open book for 'Address book', and an envelope for 'E-mail'. Below these is a yellow banner with the text 'What should I do next?' and 'You have 4 outstanding unthanked gifts. Send [Help me get started](#)'. The main content area features a personalized welcome message: 'Welcome back, Jonathan!' followed by a progress report: 'So far you've raised \$725.00 and reached 72% of your goal for this year's event.' At the bottom, a red-bordered box titled 'Latest News!' contains the text: 'We're excited to announce the newest sponsor for this year's event, Bank of America!'.

# Maximize your Participant Center

## ■ And...

- ▶ A variety of suggested messages
  - Solicitations vs. Recruitment
  - Thank you
  - Family vs. friends vs. co-workers
  - Matching gift requests
- ▶ Talking points/factoids
  - Encourage participants to use them in their own messages, and in the other ways they're promoting your event (Facebook, Twitter, etc.)

### Recruit Team Members

[Recruit Friends to Join Your Team](#)

[Invite a Survivor to Join Your Team](#)

[Invite a Survivor to join your team](#)

[Send a mammogram reminder](#)

### Solicit Gifts

[Ask Friends to Support You With a Donation](#)

[Follow-up Email](#)

[Request a Matching Gift from your Donors](#)

### Thank You

[Thank You](#)

### Other

[Create Your Own Message](#)

[e-Card: Making Strides Around the World](#)

[e-Card: Making Strides Corporate Thank you](#)



# TeamRaiser eCommunication

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## ■ Recruitment/Retention

- ▶ Goal = growing participation
- ▶ Who to ask?
  - Past participants, participants of other events, past donors, event interest opt-ins
- ▶ How often?
  - Past participants – up to 10 invitations (depending on time frame)
  - New prospects – up to 3 invitations
  - Increased frequency risks increasing unsubscribe rates

# TeamRaiser eCommunication

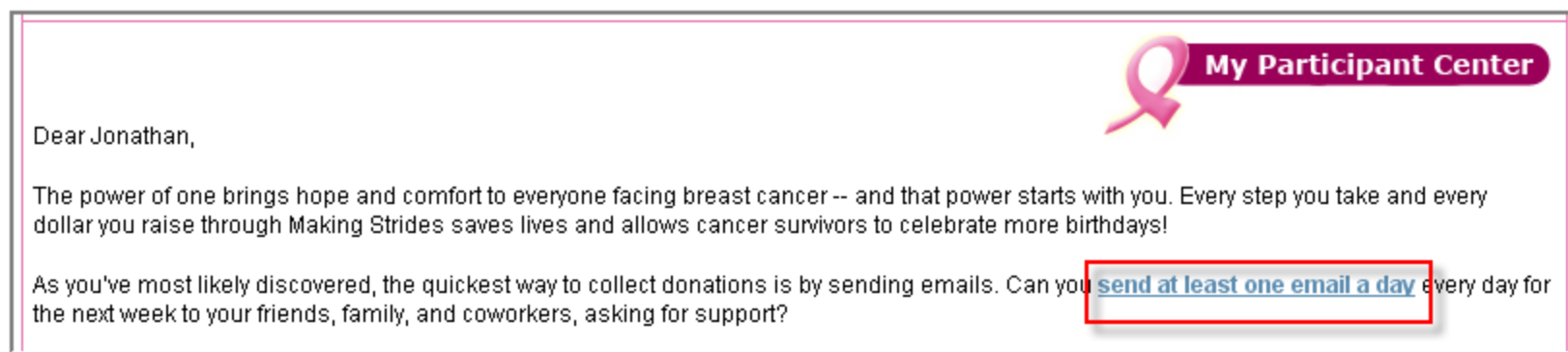
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- Coaching/Engagement
  - ▶ Goal = keeping current year's participants engaged with online fundraising
  - ▶ Keep them up to date on event details
  - ▶ Offer fundraising tips and coaching
  - ▶ Keep the competition going
    - Highlight/spotlight top participants/teams
    - Fundraising challenges
  - ▶ Let them give you feedback!
    - Mid-season survey, post-event survey

# TeamRaiser eCommunication

## ■ Coaching/Engagement


- Keep it simple – don't overwhelm with too much information
- Mix “value copy” with fundraising motivation
- **One “call to action” per message**
- Vary focus and call to action from message to message
  - Update your page
  - Invite 5 friends to join your team today
  - Send an email a day for the next week



Dear Jonathan,

The power of one brings hope and comfort to everyone facing breast cancer -- and that power starts with you. Every step you take and every dollar you raise through Making Strides saves lives and allows cancer survivors to celebrate more birthdays!

As you've most likely discovered, the quickest way to collect donations is by sending emails. Can you **send at least one email a day** every day for the next week to your friends, family, and coworkers, asking for support?

 **My Participant Center**

# TeamRaiser eCommunication in Convio

## ■ Coaching Emails

- ▶ Built-in target audiences for recruitment (*previous event participants and donors*) and coaching/engagement (*current event participants*)
- ▶ Option to add more groups



### \* 1. Email Audience:

Determines which type of participants, donors, or group members

- Current Event Participants**  
Participants who are registered for the current event.
- Previous Event Participants**  
Participants who were registered for the previous event.
- Current Event Donors**  
Donors who have given gifts to the current event.
- Previous Event Donors**  
Donors who gave gifts to the previous event.
- Groups**  
Predefined groups containing sets of constituents

# Engaging participants with coaching emails

## Personalized content based on:

- ▶ Registration info
- ▶ Fundraising behavior

Group	Type
Membership	Fundraising Goal
Phone	Amount Raised
Rewards	Donation Count
TeamRaiser	Emails Sent
TeamRaiser Registration Questions	Percent of Goal
TeamRaiser Registration Upsells	Goal Remaining
Work Address	Days Since Registering
	Days Until the Event
	Race Number

## Conditionalize content based on:

- ▶ Participation type
- ▶ Team captains, team members
- ▶ Fundraising behavior

## Promote competition with:

- ▶ Event totals
- ▶ Top 10 lists

Group	Conditional
Current Locale	All conditionals
Donations	Amount raised (current TeamRaiser)
Groups	Donation Count (current TeamRaiser)
Interests	Emails sent (current TeamRaiser)
TeamRaiser	Has a Participant Center (current TeamRaiser)
	Is on a team (current TeamRaiser)
	Is team captain (current TeamRaiser)
	Percent of goal (current TeamRaiser)
	Personal page updated (current TeamRaiser)

# Engaging participants with coaching emails

- Imagine scenarios for participants receiving the emails
  - ▶ Example 1 (Good): Dear **Jonathan**,  
*It's been **35** days since you registered for this year's event, and so far you've raised **\$450**.*  
*Congratulations!*
  - ▶ Example 2 (Bad): Dear **Jonathan**,  
*It's been **5** days since you registered for this year's event, and so far you've raised **\$0**.*  
*Congratulations!*
- Take advantage of conditionals and audience filters to best utilize personalization



# Engaging participants with coaching emails

- *Example:*

Dear **Jonathan**,

Team Captains only

As a Team Captain of **Team Jonathan** for this year's event, we'd like to thank you for lending your time and energy to help save lives.

We have **11** days until the race, and so far you've already collected an impressive **17** donations and raised **\$575**. Congratulations!

Collected 10+ donations only

# Coaching Email Audience Filters

- Registration
  - ▶ Date
  - ▶ Online/offline
  - ▶ Participation in previous year's event
- Emails sent
- Teams and company teams
- Donations
  - ▶ # and amount
  - ▶ Unconfirmed
- Promote milestones

The screenshot shows a web-based configuration interface for email audience filters. On the left is a navigation menu with five main items: '1. Select Email Audience', '2. Select Participation Types', '3. Registration Filters', '4. Team Filters', and '5. Review the Message'. Under '3. Registration Filters', there are three sub-items: 'a. Donations Received' (highlighted), 'b. Participant Emails', and 'c. Unconfirmed Gifts'. The main content area on the right is titled '1. Minimum number of donations: Send to participants where the number' and contains a text input field with the value '3'. Below this is '2. Maximum number of donations: Send to participants where the number' with an empty text input field. Next is '3. Minimum donation amount: Send to participants where the donation amount' with a text input field containing '100'. Finally, '4. Maximum donation amount: Send to participants where the donation amount' with an empty text input field. At the bottom right of the main content area are two buttons: a blue 'Next' button and a blue 'Cancel' button.

# Engaging participants with coaching emails

- Key segments to consider for audience filters:
  - ▶ Team captains
  - ▶ Company teams
  - ▶ # of emails sent
  - ▶ Fundraising
    - \$0 raised
    - Top fundraisers
    - **The 'middle' tier**

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# YAI – eCommunications Approach

Dario Mallerman – Manager, Development Department

Nicole Aubry – Manager, Central Park Challenge

YAI Network

# YAI – eCommunications Approach

Developed a plan and schedule for all ecommunications

- ▶ **Plan:** Mix of Recruiting and Coaching emails
  - 8 coaching emails over 11 weeks and one follow-up thank you email (3 recruiting emails)
- ▶ **Timing:**
  - Started ~3 months before event and sent every 3 weeks, then increased the pace to once/week as the event approached
- ▶ **Tactics:**
  - Segmentation, targeted messaging, cross-promotions and site tie-ins
- ▶ Strong plan permitted last-minute tweaks regarding developing stories

Sequence	Recruiting Email 1	Email 1	Recruiting Email 2	Email 2	Email 3	Email 4	Recruiting Email 3	Email 5	Email 6	Email 7	Email 8	Email 9
<b>Weeks Before CPC</b>	14 weeks before CPC	11 weeks before CPC	11 weeks before CPC	9 weeks before CPC	6 weeks before CPC	4 weeks before CPC	4 weeks before CPC	3 weeks before CPC	3 weeks before CPC	1 week before CPC	2 days before CPC	1 weeks after CPC
<b>Example Dates</b>	3-Mar	18-Mar	24-Mar	7-Apr	22-Apr	6-May	10-May	13-May	19-May	27-May	4-Jun	13-Jun
<b>Message</b>	Website is Live!	Welcome! Check out your pages and tools (BF; new tools)	Join us again this year	Fundraising Tips: Last year success; how to get more \$ this year	The Basics (++)Boundless Fundraising and other tools)	Key Spokesperson / Stories of Hope (Meet Siobhan)	It's not too late!	Fundraising Tips (examples of success: teams and individuals)	Grow the event; Tell a friend; Email tips	Hero for Hope / David Eigenberg video	Logistics; Last-Minute Fundraising Tips	Thank You

# YAI – Recruiting Plan

*Start early and send first email to all past participants (for a small plan; segment for a larger plan)*

- **Timing:** 12+ weeks before event
- **Target:** Past Participants
- **Messaging:** Strong call to action registration promotion with deadline

*Last-minute Recruiting:*

- **Timing:** 4 weeks before event
- **Messaging:** It's Not Too Late!



**Central Park Challenge**

Saturday  
June 6, 2009

A day of hope to benefit  
**YAI National Institute for People with Disabilities**  
NETWORK

Heidi,

Welcome to [YAI and Broadview Networks 2009 Central Park Challenge!](#)

As a past participant in the event, you've made a tangible difference in the lives of people with disabilities. What started as a small run has grown to be one of New York City's major fundraising events, and we couldn't have done it without you!

Help us do even more this year by [registering today](#). Join our friends, families and staff who have already committed to getting an early start on their fundraising efforts. Register today to give yourself extra time to raise much needed funds in this challenging economy. To help you get started we are offering you the opportunity to register for free through the month of March!

**Walk.**



**Run.**



**Play.**



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**Central Park Challenge**

Saturday  
June 6, 2009

A day of hope to benefit  
**YAI National Institute for People with Disabilities**  
NETWORK

Heidi,

There are only 7 days left of our *free registration* promotion for this year's [YAI and Broadview Networks Central Park Challenge](#). As a past participant, you know first-hand how important this event is to the children and adults with disabilities that the YAI/NIPD Network serves every day.

**Join us again. Here's how:**

Enter the code walkmarch (or runmarch if you're [running](#)) in the "Participation Box" to register for the [Walk](#). Then click "GO", scroll down and select the "No Fee" option. Enter your username/password and you're all done!

Thank you for helping to make the YAI/NIPD Network a Place of Hope. We're looking forward to another year of *Walking and Running and Playing* on June 6 in Central Park!

Thanks,

Nicole Sheahan

**Walk.**



**Run.**



**Play.**



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Challenge to with

isabilities us raise

# YAI – Recruiting Messaging

## *Engage the past participant*

- Acknowledge last year's contribution
- Reasons for early registration
- Reminder of last year's registration information, time sensitivity
- Encourage "Virtual" participation

**YAI and BROADVIEW NETWORKS** | Saturday June 6, 2009 | A day of hope to benefit YAI National Institute for People with Disabilities NETWORK

Central Park Challenge

Heidi,

Welcome to [YAI and Broadview Networks 2009 Central Park Challenge!](#)

As a past participant in the event, you've made a tangible difference in the lives of people with disabilities. What started as a small run has grown to be one of New York City's major fundraising events, and we couldn't have done it without you!

Help us do even more this year by [registering today](#). Join our friends, families and staff who have already committed to getting an early start on their fundraising efforts. Register today to give yourself extra time to raise much needed funds in this challenging economy. To help you get started we are offering you the opportunity to register for free through the month of March!

Bypass the fee by selecting a code from below and then enter it in the "participation code" box.  
[To register for the 3K Walk, enter:](#) walkmarch  
[To register for the 5K Run, enter:](#) runmarch  
Click GO, scroll down and select the "No Fee" option.

At this point you'll be prompted for your username and password.

Don't remember? Here it is.

USERNAME: cd-heidi  
PASSWORD: (administrator password masked out for security reasons)


**Note: This promotion expires on Tuesday, March 31.**


We're looking forward to having you join us at the Central Park Challenge to help the YAI/NIPD Network remain a Place of Hope for people with disabilities!


Thanks,

Nicole Sheahan  
Manager, Central Park Challenge

PS: You can still make a difference in the lives of people with disabilities even if you can't make it on June 6th. Register today, and help us raise much needed funds online!

**Walk.**  


**Run.**  


**Play.**  


# YAI – Coaching Plan

*Start early, use conditional content, drive participant to participant center*

- **Strategy:** Increase peer-to-peer fundraising in down economy; coach participants along the way; increase day-off participants
- **Timing:** 12+ weeks before event
- **Frequency:** every 3 weeks moving into 1x/week as event approaches
- **Target:** All current Participants
- **Messaging:** Fundraising tips along the way

**YAI** and **BROADVIEW NETWORKS**  
**Central Park Challenge**

Saturday  
June 6, 2009

A day of hope to benefit  
**YAI** National Institute for  
People with Disabilities  
NETWORK

Dear Heidi

Congratulations! You have already taken your first step in creating hope and opportunity for people with disabilities!

In less than 70 days, thousands of people will join you in celebrating the abilities of all people by walking, running and playing at the [2009 YAI and Broadview Networks Central Park Challenge](#). We know it's still cold outside, but June's just around the corner. Log in to your [participant center](#) and update your personal page and set your fundraising goal. Then, send emails asking friends and family to support your fundraising challenge.


Thank you for registering early! We are here for you every step of the way with helpful tips and encouragement.


**fundraise with facebook** P.S. We've got lots going on to keep you in the loop - check out our newest [Central Park Challenge blog](#) and don't forget to [add YAI's boundlessFUNDRAISING™ to your Facebook page!](#)


Sincerely,

*Nicole Sheahan*

Nicole Sheahan  
Manager, Central Park Challenge

**Walk.**  


**Run.**  


**Play.**  




# YAI – Targeted Messaging

- Through segmentation, developed content for each group
- Use conditionals to deliver messages based on participation type, fundraising levels, etc.
- Segments
  - ▶ Team captains
  - ▶ Individual participants
  - ▶ Team members
  - ▶ Participants using Boundless Fundraising
  - ▶ % of goal reached

YAI and BROADVIEW NETWORKS  
Central Park Challenge

Saturday  
June 6, 2009

A day of hope to benefit  
YAI National Institute for  
People with Disabilities  
NETWORK

Dear Heidi

20,000 children and adults with developmental and learning disabilities receive vital services from the YAI/NIPD Network every day. If everyone you know gave just \$20 to support your fundraising efforts, imagine the impact that it would make in the lives of people with disabilities.

Visit your [Participant Center](#) for our **top tips** to help you be successful in raising funds and awareness. Once you are there, update your personal and/or team page, track your fundraising progress and use our sample emails.

We'll check in with you in a few weeks but, in the meantime, if you need anything, just let me know. Thank you for helping to raise funds and awareness for people with disabilities. With your support, people with disabilities are achieving their goals of independence and inclusion in their communities.

Sincerely,

*Nicole Sheahan*

Nicole Sheahan  
Manager, Central Park Challenge

P.S. Don't miss our newly updated [Spread the Word](#) page - we're on Twitter.

**Walk.**

**Run.**

**Play.**

## **Team Captains:**

*Coach your team members along the way – make sure they know all about using our online tools that make fundraising easier than ever. Have them log in to their [Participant Center](#) and start reaching out to friends, family and co-workers today.*

# YAI – Storytelling

- Consistent messaging across channels – tell the same story
- Associate a face to the message and event to draw in participants and identify with the event


**YAI and BROADVIEW NETWORKS**  
**Central Park Challenge** | Saturday June 6, 2009 | A day of hope to benefit YAI National Institute for People with Disabilities NETWORK

Home | About YAI/NIPD | About Event | Donate

Who We Are  
What's New at YAI  
What We Do  
**Stories of Hope**  
Videos

## Stories of Hope

### Meet Siobhan



Like a lot of little girls, 2-year-old Siobhan loves to play with dolls. She has long conversations with them in her own babbled language. While Siobhan has Down syndrome, has yet to speak real words, everyone knows it's a matter of time.

With the support of her family and her early intervention teachers at the YAI/NIPD Network, that day is quickly approaching.

"I want to hear her speak because I know she can; I want to hear her read, Louise, Siobhan's mom. "I want to hear her read."

As for John, Siobhan's dad, there's only one word he needs to hear: "about do it."

**Update! Exciting times here at YAI! We have amazing, late breaking news about Siobhan. If you haven't been introduced to her already, definitely be sure to watch this video first. We promise, it will make the new video all the more exciting.**

Dear Heidi


You may have seen our daughter Siobhan on the [Central Park Challenge Web site](#), video, taxi cabs and posters all over New York. Not only are we so proud of her for representing the YAI community, but we are filled with inspiration by the progress she is making at her YAI preschool. Siobhan's days are filled with songs, books, pictures and sign language to jump start her communication skills. Her teachers tell us that she is closer than ever to saying her first words with every passing day.


This explains why we can't wait to walk with our team at the [Central Park Challenge on June 6!](#) And we know our daughter Siobhan's story is just one among the thousands of children and adults with disabilities who need YAI's services to live their lives. All of our efforts to raise money will help YAI bring opportunities to Siobhan and thousands of other people.

From the bottom of our hearts we thank you on behalf of all of the parents, children and adults whose lives will be touched by your participation in the **2009 Central Park Challenge**. Make sure to log in to your [Participant Center](#) and send emails letting your friends and family know about the thousands of individuals like Siobhan who receive services and support from YAI/NIPD Network.

We are looking forward to seeing you there as we all come together for this important cause again!

**Walk.**  


**Run.**  


**Play.**  


# YAI – Integrate Social Networking

- Use emails as a delivery method for cross-promotion
  - ▶ Donate your Facebook status to the Central Park Challenge
  - ▶ Promote social networking and fundraising applications
  - ▶ Videos
  - ▶ Flickr
  - ▶ Blog
  - ▶ Twitter

YAI and BROADVIEW NETWORKS  
**Central Park Challenge**

Dear Heidi

Congratulations! You have a great opportunity for people with disabilities.

In less than 70 days, we will have the abilities of all people in the [Broadview Network](#) outside, but June's just started and update your profile and emails asking friends to help.

Thank you for registering with helpful tips and

**fundraise with facebook**

YAI and BROADVIEW NETWORKS  
**Central Park Challenge**

Saturday June 6, 2009

A day of hope to benefit  
YAI National Institute for People with Disabilities  
NETWORK

Dear Heidi,

We are so happy that you added [YAI's Boundless Fundraising Facebook](#) application as part of your [Central Park Challenge](#) fundraising efforts.

With only 9 days until this year's [Central Park Challenge](#), it's more important than ever to let everyone know about your fundraising goal and how their generous donations support the YAI/NIPD Network.

Make sure to update your Facebook status with one of the following statements (or create your own):

- *I am making a difference in the lives of people with disabilities. See how I'm doing by clicking the thermometer on my profile page.*
- *Help me raise \$ (insert amount) more to support the YAI/NIPD Network and people with disabilities. Click the thermometer on my profile page.*
- *Only 9 days to go and I need your help! On June 6, support my efforts in the YAI Central Park Challenge and help people with disabilities in our community. Click the thermometer on my profile page.*
- *June 6 is this year's YAI Central Park Challenge and I still hope to raise another \$ (insert amount)! Help me reach my goal by clicking the thermometer on my profile page.*

Thank you again for all of your efforts in this year's [Central Park Challenge](#). Because of your support and hard work, we're 84% of the way there! Take advantage of these next 9 days to reach your goal and continue supporting the YAI/NIPD Network.

**Walk.**  


**Run.**  


**Play.**  


P.S. We've got lots going on to keep you in the loop - check out our newest [Central Park Challenge blog](#) and don't forget to [add YAI's boundlessFUNDRAISING™](#) to your Facebook page!



Donations will also be accepted at registration. See [Donation Form](#) and bring it with you to the park.

information follow us on




# YAI – Experiment

- Subject Lines:
  - “OMG 4 Days to the Event!”
- Spread the word:
  - Donate your Facebook Status
- Message:
  - Remind participants of the reasons for their commitment – Siobhan’s First Words
- Last-minute changes:
  - Added Siobhan’s first words email as breaking news

YAI and BROADVIEW NETWORKS  
**Central Park Challenge** | Saturday June 6, 2009 | A day of hope to benefit YAI National Institute for People with Disabilities NETWORKS

Dear Heidi,

Siobhan, the amazing little girl who represents the spirit of the [Central Park Challenge](#) had a very exciting week. Because of her perseverance and the dedication of the staff at the YAI/NIPD Network pre-school, she achieved a major milestone and we can't wait to share it with you.



[Watch the video](#) here and make sure to send a word of encouragement to Siobhan and her family.


Take this opportunity to share this news with your friends to let them know that their donation to your efforts in the [Central Park Challenge](#) changes lives like Siobhan's.


Every donation, big and small, brings us closer to helping people living with disabilities! Thank you, we couldn't do it without you.


Sincerely,

*Nicole Sheahan*

Nicole Sheahan  
Manager, Central Park Challenge

**Walk.**  


**Run.**  


**Play.**  


# YAI – Results

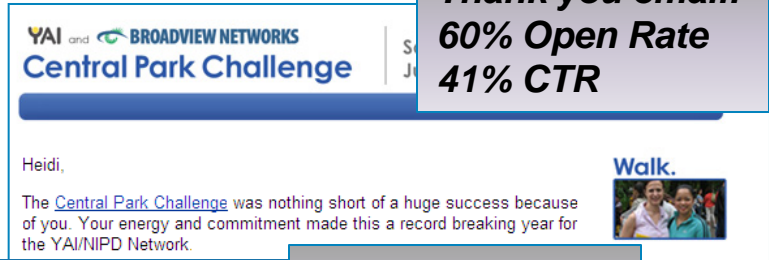
## Overall Results

- ▶ Open Rate: 49%
- ▶ CTR: 16%
- ▶ Action Rate: 0.15%

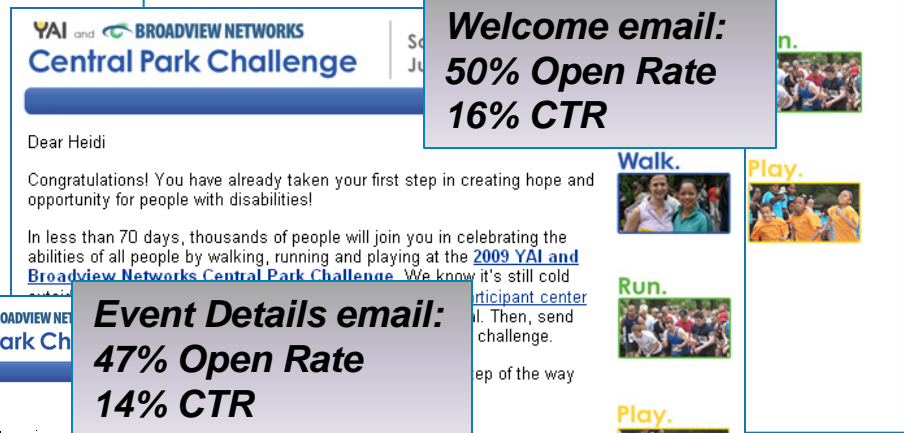
## Highs

- ▶ Welcome Email
- ▶ Siobhan’s First Words
- ▶ Event Details
- ▶ Thank you (photo and video links of event)

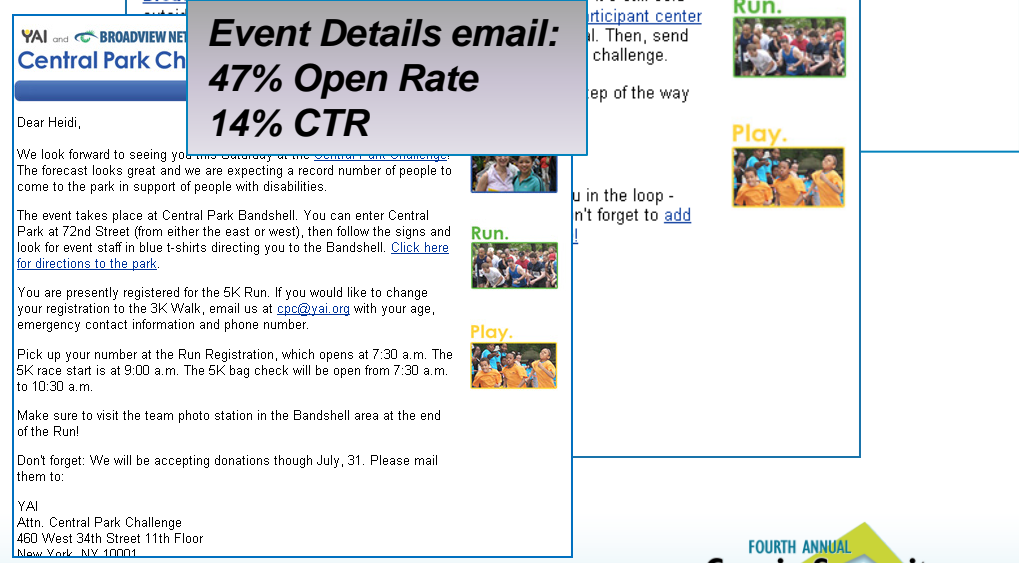
**Thank you email:**  
**60% Open Rate**  
**41% CTR**



**Welcome email:**  
**50% Open Rate**  
**16% CTR**



**Event Details email:**  
**47% Open Rate**  
**14% CTR**



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# Blueprinting, Event Manager Center and Messaging

Bethany Bauman, Associate Director, eCRM  
American Diabetes Association  
Wednesday, November 18, 2009

# Taking the leap

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- Why did American Diabetes Association decide to use these advanced TeamRaiser tools for event management and marketing?
  - ▶ The support needs of our field staff had outgrown the resources of our national staff.  
One engineer + over 300 TeamRaisers= Burnout!
  - ▶ Field staff were recreating the wheel in terms of email messages, or they weren't engaged enough in email marketing, or they didn't represent national messaging at all.
  - ▶ Edits during season required engineer to touch every TeamRaiser...back to the burnout issue!

# Blueprinting

---

- What's a Blueprint TeamRaiser?
  - ▶ Enables your organization to create a model TeamRaiser event for a program and then generate the actual local, or child, events related to the program
  - ▶ Flexible so that you can lock certain attributes and options, but leave others open so they can be configured to accommodate the uniqueness of each local event



# Advantages and Disadvantages of Blueprinting

## ■ Advantages

- ▶ Time saver in global editing throughout the event season
- ▶ Consistency in key elements of campaign, flexibility for local offices
- ▶ Coaching email series replication to all children
- ▶ Reports for Event Manager Center

## ■ Disadvantages

- ▶ Can't add elements post-replication, can only edit them (ie: a new registration question meant we had to touch 152 TeamRaisers)
- ▶ Changes perform in a background task and aren't immediate
- ▶ Once you replicate, any changes to coaching emails don't roll down to the children.

# Event Manager Center

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- What's Event Manager Center?
  - ▶ Enables your organization to create different levels of event administrator access (staff, volunteer, etc.)
  - ▶ These administrators can perform various event configuration and management tasks, including editing event information, registration information, certain pages, autorepsonders and suggested messages.
  - ▶ You can customize the look and feel of the EMC by adding custom headers and footers, as well as changing colors and fonts (great to carry event branding through)

# Inside the EMC

The screenshot shows the Convio Event Management Center interface. At the top left is the Convio logo, and at the top right is the text "Event Management Center". Below this is a navigation bar with links for "Event Center", "Event Web Site", "Event Emails", "Customer Service", and "Reports". The "Event Center" link is highlighted. On the left side, there is a sidebar with "Related Actions" including "Edit Event Options", "Edit Participation Types", "Edit Milestones", "Edit Event Questions", "Edit Team Captain Questions", "Edit Upsells", "Customize Event URL", "Test Drive", "Edit Event Properties", "Edit Contact Properties", and "Manage Event Library". The main content area displays a "Welcome to Your Event Management Center" message, an "Event Status" box indicating "Accepting Registrations and Gifts", and a list of accessible features: Event Website, Event Emails, Customer Service, Reports, and Related Actions. A note at the bottom of the main area provides assistance information, and a link for the Privacy Policy is located at the bottom center.

convio®

Event Management Center

Welcome back April Davis [Click here to logoff](#) [Help](#)

[Event Center](#) [Event Web Site](#) [Event Emails](#) [Customer Service](#) [Reports](#)

Event Center

Related Actions

- ▶ Edit Event Options
- ▶ Edit Participation Types
- ▶ Edit Milestones
- ▶ Edit Event Questions
- ▶ Edit Team Captain Questions
- ▶ Edit Upsells
- ▶ Customize Event URL
- ▶ Test Drive
- ▶ Edit Event Properties
- ▶ Edit Contact Properties
- ▶ Manage Event Library

Welcome to Your Event Management Center

**Event Status**  
Accepting Registrations and Gifts

If you have appropriate permissions, from this Event Center, you can access:

- **Event Website** to work with TeamRaiser Web pages (including the left-side navigation area)
- **Event Emails** to work with three types of email messaging for corresponding with others about this TeamRaiser
- **Customer Service** to register participants and manage their information as well as manage team, company, and gift information
- **Reports** to view and run reports about the participant fundraising activity
- **Related Actions** (*listed to the left*) to work with event information or Test Drive the configuration with simulated participant and donor information

Note: For assistance with these tasks, click the Help link above the top navigation bar.

[Privacy Policy Is online giving safe?](#)

# Advantages and Disadvantages of EMC

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## ■ Advantages

- ▶ Field staff can control own greeting pages
- ▶ Ability to manage existing email groups
- ▶ Ability to upload documents and images directly
- ▶ Volunteers can help out with limited access
- ▶ Can have EMC rights assigned to a participant account

## ■ Disadvantages

- ▶ No access to Reports Classic
- ▶ Changes to autoresponders are at end of email
- ▶ Can't have EMC rights assigned to a traditional Convio admin account

# Culture change and training for EMC

- Classes for staff and volunteers
- Manuals and documentation
- Working with executive directors to understand their staff's responsibility and limitations
- Personnel to support and train

Managing Email Groups

From your Event Emails page, select "Manage Email Groups" to search your email groups for members, add or edit them and to upload a custom email list (ex: committee or volunteers). This list will be available for you to send emails to, but this does NOT register them.

Registrant groups from prior to last year have been combined into one group entitled "past riders" rather than cluttering up your list with a different group for every year. This will save you time in setting up your Recruitment emails and make it easier to ensure people who ask to not receive the email are removed from the groups your are targeting.

Selecting "Manage" will allow you to search for a participant, remove them from the group or add someone new to the group.

Name	Actions	Creation Date
TDC 4451 past riders	Manage	July 30, 2008 10:56 PM
TDC 4455 00230001 San Antonio, TX District	Manage	August 3, 2008 2:31 PM
TDC 4455 00230001 San Antonio, TX Council Registration	Manage	August 3, 2008 2:31 PM

Member	Actions
Anonymous	Full Remove
Michelle Alvarez michelle75@gmail.com	Full Remove
Michelle Alvarez mich75@gmail.com	Full Remove
James Alford j_alford@atf.com	Full Remove
Patricia Alvarez blackbird_1200@gmail.com	Full Remove
Theresa Alvarez	Full Remove

# Email templates within EMC

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- Step Out: Walk to Fight Diabetes
  - ▶ 4 prospect recruitment emails, 10 past participant recruitment emails, 14 engagement emails over 6 months
  - ▶ Windows for local customization
  - ▶ Sent nationally
  
- Tour de Cure
  - ▶ 13 past participant recruitment emails, 12 engagement emails over 10 months pre-DOE
  - ▶ Templates with canned content
  - ▶ Sent locally

# Emails



## Personalize and update your Step Out Center

Dear Heather:

Why do you Step Out?

Like the thousands of other dedicated walkers Stepping Out this year, you have already taken significant steps to end this devastating disease just by signing up for **Step Out: Walk to Fight Diabetes**.

Your personal story and the reasons you are part of **Step Out: Walk to Fight Diabetes** are powerful motivators to your friends and family to support you with a donation.

Please share your story of commitment to fight diabetes by updating your Personal Page and sending it to anyone and everyone you can! The more you use your Step Out Center tools and personalize your page, the more success you'll discover.

[Log into your Step Out Center](#) now and share your story today.

**PARTICIPANT CENTER**


Thank you for sharing your time and stories in the fight against diabetes. In the next few weeks we will share with you more stories of people who are Stepping Out against diabetes.

Sincerely,

ADA Step Out Staff  
Step Out: Walk to Fight Diabetes



**Learn about your tools to update your story and motivate your friends to support you!**



Mail From: "TEST MESSAGE FROM: ADA Tour Staff" <touradmin@diabetes.org>

From: "TEST MESSAGE FROM: ADA Tour Staff" <touradmin@diabetes.org>  
To: Bauman, Bethany  
Subject: Engagement 12 weeks out

To view this email as a web page, [click here](#).

## American Diabetes Association Tour de Cure

Tour de Cure - CITY, STATE on MONTH #, 2010  
Rider Newsletter



**Dear Ryan,**

There are 12 weeks until the Tour de Cure! As of today we have signed up and with your help we can reach our goal of!

The discounted early registration fee for the Tour de Cure ends this week! Now is the time to reach out and encourage people to join your team. Make sure all of your riders from last year are registered. Not sure how to get in contact with them? Ask me, I'll give you a hand.

Participating in Tour de Cure as a team is fun! If you're already on a team, or want to start a new one, we have lots of tools and resources for you. Send me an email at ["contact info"](#).

### Tour de Cure NEWS

**Route maps have been updated online**  
It is our priority to make the Tour de Cure route fun and safe for you. Check out this year's route maps on our local site at ["insert link to Route Maps on local site"](#).

What can you expect on the Tour de Cure route? You'll see many people and things all there to make your ride a better—and safer—one.

- SAG Vehicles - Standing for Support and Gear, these vehicles patrol the route and are there for any riders needing assistance.
- Mechanical Support - Our bike shop sponsors provide mechanics to help with adjustments or minor repairs to your bike. However, always carry your own spare tube and basic tool set.
- Amateur Radio Operators - Known as the eyes and ears of the route, these individuals monitor the route and relay information via their communications equipment so help can be sent where needed.
- Signage - The Tour de Cure route is marked with a combination of "road hickies" and upright directional signs. Road hickies are directional arrows chalked on the road to indicate turns.
- Police vehicles - We have secured the assistance of local municipalities to provide police support at busy intersections for additional safety.

### Team Captain Corner

Attention TEAM CAPTAINS - we have a GREAT contest just for you! If you get 5 people on your team and you raise \$1,500 before **"insert Team Captain Incentive Deadline"** you will receive these great Tour de Cure Team Captain Arm Warmers. Start building your team today and encourage them to fundraise! Please contact ["insert Coordinator Name"](#) if you have any questions.

### Questions?

Have a question about the Tour de Cure? Feel free to contact me at ["insert Contact Information"](#). I'm here to help in any way I can!

### A Look at the Leader Board

Top 10 Individuals	Top 10 Corporate Teams	Top 10 Family & Friends Teams	Top 10 Club & Organization Teams
Samt - first last	Samt - first last	Samt - first last	Samt - first last
Samt - first last	Samt - first last	Samt - first last	Samt - first last
Samt - first last	Samt - first last	Samt - first last	Samt - first last

[Visit Tour de Cure Web Site](#) | [Contact Us](#) | [Unsubscribe](#)

Your participation will support research to prevent and cure diabetes as well as programs to improve the lives of those affected by diabetes.

FOURTH ANNUAL  
**Convio Summit**  
November 16-18 **2009**

# Fundraising Milestones Personal Gift Icon Participant Stationery

April Davis  
Consultant, Web Development Services  
Convio



# Fundraising Milestones

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- Sounds neat, but what are they?
  - ▶ Set amount(s) that you would like participants to reach.
  - ▶ Awards the participant with a fundraising badge that appears next to their name and on their personal page.

# Administrative Benefits of Milestones

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- Why would my organization want to use the milestones?
  - ▶ They help encourage people to reach the next fundraising level by sending out an automatic email which coaches them on how to reach the next level.
  - ▶ People like badges! Encourages a bit of a competitive spirit to get the next badge.
  - ▶ Automatic notification sent to designated administrative emails each time someone reaches a milestone. No additional reports needed!

# Where to find Milestones

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- The Milestones can be configured in your TeamRaiser in Step 7 – Manage Milestones.
  - ▶ Setting up a new milestone allows you to set the amount, the participation type it is tied to, the admin notification (both event managers and Convio level admins), and AutoResponder content that goes to the participant.

# Personal Gift Icon

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- What exactly is a personal gift icon?
  - ▶ An icon that appears next to someone's name, or on their personal page, when they have donated to themselves to kick-start their fundraising. (Additional gift during registration, or a personal gift made later)

# Why to use a Personal Gift Icon

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- Sure, I want people to give additional gifts when they register, but why give them an icon?
  - ▶ Again, people love badges!
  - ▶ An easy way for participants to show that they have donated to their own fundraising efforts, which will help encourage others to donate to them as well.

# Badges – Personal Page

## Welcome to My Personal Page

**Support Noel!**

**Join Noel's Team!**

**Convio Cruisers**

**Achievements**

-  **Gold Level Fundraiser**  
Raised \$1000 or more
-  **Personal Gift Donor**

**Noel Beebe**



Goal: \$250.00  
Achieved: \$1,500.00

### Support me in this cause!

This will be my 6th year participating in this amazing event. Please help support my participation by making a gift to this very worthy cause!

As you can see, I've made a donation to myself, and have achieved the personal gift and gold level fundraising badges. This is so everyone knows that I have put forth a lot of effort towards reaching my own fundraising goal. Don't you want an achievement badge too?

When you make a donation in support of this event, 75% of those funds will stay right here in our county to help people affected by this issue. The other 25% will go towards national research so that future generations will not have to worry about issues such as this.



# Badges – Lists

## Team Roster

Convio Cruisers - <a href="#">Join Team</a>	Raised
★ 🍷 \$ <a href="#">Noel Beebe</a>	\$1,500.00
\$ <a href="#">Myra Friel</a>	\$100.00
🍷 \$ <a href="#">Cheryl Gipson</a>	\$2,000.00
🍷 <a href="#">Kevin Suer</a>	\$1,200.00
<a href="#">James Young</a>	\$0.00
Team Gifts	\$0.00

★ Denotes a Team Captain

## Top Participants List

- 1 - 🍷 \$ [Cheryl Gipson](#) (\$2,000.00)
- 2 - 🍷 \$ [Noel Beebe](#) (\$1,500.00)
- 3 - 🍷 [Kevin Suer](#) (\$1,200.00)
- 4 - \$ [Myra Friel](#) (\$100.00)

## Search Results

Name	Team Name	Team Company
🍷 \$ <a href="#">Beebe, Noel</a>	<a href="#">Convio Cruisers</a>	<a href="#">Convio, Inc</a>
\$ <a href="#">Friel, Myra</a>	<a href="#">Convio Cruisers</a>	<a href="#">Convio, Inc</a>
🍷 \$ <a href="#">Gipson, Cheryl</a>	<a href="#">Convio Cruisers</a>	<a href="#">Convio, Inc</a>
🍷 <a href="#">Suer, Kevin</a>	<a href="#">Convio Cruisers</a>	<a href="#">Convio, Inc</a>
<a href="#">Young, James</a>	<a href="#">Convio Cruisers</a>	<a href="#">Convio, Inc</a>

# Appealing Participant Stationery

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- Why not use the same Stationery as I use for AutoResponders and coaching email?
  - ▶ Setting specific stationery to suggested messages encourages the participant to send different messages.
  - ▶ A donate button can be configured to go directly to the donation form on behalf of the participant. Very clearly calls out the donate action apart from the links at the bottom of the message.



# Suggestions

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- What different ways can the stationery be used?
  - ▶ Set up a few different e-cards within the Suggested Messages area. Using the suggested messages as e-cards will automatically append all TeamRaiser links to the bottom of the message.
  - ▶ Include event specific information in the stationery with the use of tags – Event Title, Event Location, Event Date, Percentage of goal, etc.
  - ▶ Link directly to the donation form for the participant so there are no additional clicks needed.

# Stationery Example



2009 Summit  
November 16-18 2009  
Austin, TX



Help support my  
fundraising efforts  
**Donate Now**

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Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce quis risus. Nam vitae odio at purus adipiscing tincidunt. Suspendisse sem sem, aliquet et, pharetra nec, vestibulum in, mauris. Etiam pharetra lorem in leo. Donec iaculis, erat non pulvinar elementum, elit lectus ullamcorper dolor, sit amet adipiscing velit odio nec felis. Suspendisse pharetra odio et ipsum. Integer nisi. In hac habitasse platea dictumst. Sed massa. Aliquam rutrum blandit sem. Maecenas ac risus. In commodo venenatis sem. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Nulla semper. Fusce pellentesque orci a justo.

Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nulla ac odio sed dolor egestas bibendum. Phasellus volutpat semper velit. Phasellus pharetra libero vel turpis. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas in sem. Nunc dapibus sapien sed nulla. Maecenas diam est, consequat et, posuere vitae, malesuada at, sapien. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Integer eros lectus, pretium in, dapibus in, scelerisque ut, ipsum. Suspendisse elit. Sed id augue. Cras euismod scelerisque purus. Integer blandit. Nulla et sem. Proin dui urna, sollicitudin vitae, vulputate in, lacinia at, risus. Nullam at massa ac sem rhoncus rhoncus. Sed ut neque.

Integer vitae quam sed tellus suscipit faucibus. Cras arcu dolor, porttitor consectetur, dapibus quis, scelerisque non, metus. Proin luctus, ante vel ultrices vulputate, lorem leo accumsan magna, a sagittis ligula risus nec magna. Nulla vel tortor. Praesent vestibulum metus in diam. Mauris vulputate nulla et nibh scelerisque lobortis. Etiam faucibus enim ut massa consequat pulvinar. Duis pulvinar augue in diam. Suspendisse congue molestie lorem. In scelerisque ante at ipsum. Morbi venenatis tortor in nisl. Aenean ornare consequat est. Donec eu est. Donec tincidunt odio in ligula. Morbi sem quam, eleifend vulputate, auctor vitae, pretium sit amet, enim.

Sincerely,  
April Davis

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[Unsubscribe](#)

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# Donate Button Tags

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- Don't Panic! You don't need to remember this, just copy it.
  - ▶ `http://[[S29:DOMAIN]]/site/Donation2?idb=[[S76:idb]]&df_id=[[S42:0:form-id]]&FR_ID=[[S80:trID]]&PROXY_ID=[[S1:cons_id]]&PROXY_TYPE=20&[[S42:0:form-id]].donation=form1`
- All other TeamRaiser s tags will work (available within the Components dropdown), however C-tags will not.

# Questions?

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- Ask away!

Text **CNV132** to **30644**  
to take a quick survey  
about this session.

**Don't forget to visit the Expert Lab!**