LUMINATE COMUNITY
MONTHLY WEBINAR SERIES

JULY 30, 2013

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LUMINATE COMUNITY
MONTHLY WEBINAR SERIES

JULY 30, 2013

BOOSTING YOUR TEAMRAISER COACHING COMMUNICATION

blackbaud™
your passion › our purpose

Presented July 30, 2013

HOUSEKEEPING

- To keep noise down we will mute all phones.

- Please chat your questions in, we have people in chat who will monitor and respond.

- Slides, recording and resources will be posted on the CCC Webinars page for downloading, you will also receive a follow up email.

- There will be a thread in the Community where you can post questions following the webinar. Simply search "July Webinar" in the Community to find the thread.

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MEET YOUR PRESENTERS

Kent Gilliam
**Senior Programs Manager**
Blackbaud

- 6 years working for DFW nonprofits
- 5 1/2 years at Convio/Blackbaud consulting/teaching online fundraising/marketing strategies and best practices

Noel Beebe
Associate Director, Constituent Events
Alzheimer's Association

- Responsible for:
- All Constituent Event web properties
- Analytics and Online Fundraising Strategy
- Chapter Training and Support
- 7+ years at Convio as Account Manager, TeamRaiser Product Manager, and Senior Strategy Consultant
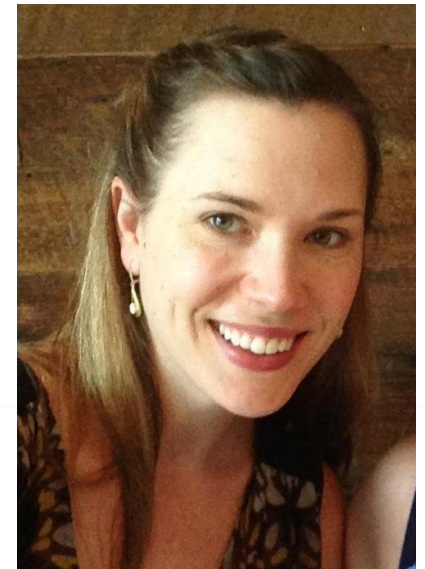
TODAY'S TOPICS

- Quick look at our FREE kit

- What email tools are available for coaching communication

- Get a personal tour of Alzheimer's Association's coaching email approach

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> **FREE KIT**

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➤ PARTICIPANT-FACING TIPS PAGE

We're providing you with a product-agnostic page that are perfect to share with your event participants

Fundraising can be hard, but it doesn't have to be. Use these tips to improve your fundraising and achieve your goal. And most of all, have fun!

Key highlights to help you reach your goal...

- On average it takes 5 emails to get 1 donation
- People who personalize their page raise 4x more!
- Social is great but email is still more "personal"

- Making your effort "personal" boosts support
- People are more likely to help you reach your goal when they know your goal

Use the tips below to help you reach your fundraising goals and help those we serve.

▶ What is the best way to raise Money?

▶ Kick-off your fundraising with a donation

▶ Make the personal ask to your inner circle

▶ Share your connection

▶ Share your passion with friends and family

Your friends and family will give because you are asking them to. Your appeal should be personal in nature and share why you are fundraising.

1. Ask on days that that your donors may be more likely to give, for example ask on traditional paydays (15th and 30th or Fridays) or when they have access to a computer. You want donors to be able to take immediate action when you ask.
2. If you haven't already done so, start using your social media accounts to

Easy as 1,2,3.

SAMPLE IMAGE

> Fundraising can be hard, but it doesn't have to be. Use these tips to improve your fundraising and achieve your goal. And most of all, have fun!

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▶ Make the personal ask to your inner circle

▶ Share your connection

▶ Share your passion with friends and family

▶ Share your goal and progress!

▶ Plan to raise $500 in one month! Here's how...

Other Ways to Raise!

▶ Have a bake sale

▶ Do a carwash fundraiser

▶ Host a sports pool for the sports buffs in your circle

See live example at:
http://customer.convio.com/p2p_fr_tips

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Use the tips below to help you reach your fundraising goals and help those we serve.

▶ What is the best way to raise Money?

The best way to increase your fundraising is to strategically ask your network to donate in order that they are most likely to donate with messaging that connects them to your appeal.

- 74.6 % of donors are more likely to give if asked by a family member and 62.8% if asked by a friend.
- As an individual fundraiser makes progress towards his or her fundraising goal, people will become more likely to make contributions.

1st: Segment Your Network
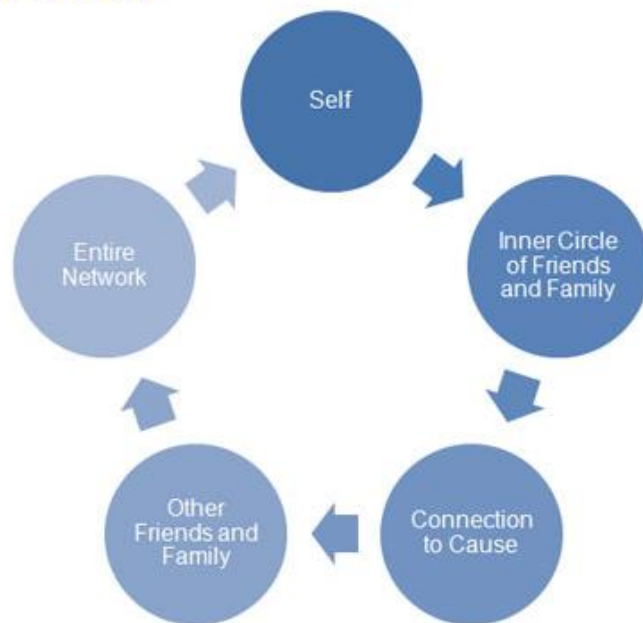
2nd: Customize Your Message for Each Group

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➤ COMPLETE COACHING EMAIL TEMPLATES AND TIPS

BLACKBAUD TEAMRAISER Team Captain Coaching Series Setup Document

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Team Captain Coaching Series Setup Document

Teams are forming and team members are looking to their captains for guidance on what to do. It is time to start coaching those captains on how to build an effective fundraising team. This email series will specifically target team captains who have the strongest influence on how well their teams will fundraiser on your behalf.

This setup document will help you plan an email coaching series that
Included is a recommended campaign calendar, individual email plan
the first email in the series, step-by-step target audience build instruc
create this campaign series.

Campaign Overview

- Email #1: Build Your Team
- Email #2: Build Your Team; Fundraise; Spread the Word
- Email #3: Inspirational Video or Feature Story
- Email #4: Getting Close; Final Team Recruitment/Fundraisi
- Email #5: Event Details
- Email #6: Thank You; Keep Fundraising
- Email #7: Event Follow-up

BLACKBAUD TEAMRAISER Participant Coaching Series Setup Document

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Participant Coaching Series Setup Document

Once registered, participants have to learn to become effective fundraisers. Returning participants raise more money than first time participants because of experience. With this email series we're aiming to close that gap with fundraising suggestions, actions, tips and inspiration so all participants can become rock-star fundraisers out of the gate. This email series will target all non-team captain registered participants.

This setup document will help you plan an email coaching series that specifically targets participants of your events. Included is a recommended campaign calendar, individual email planning guides for each email in the series, starter copy for the first email in the series, step-by-step target audience build instructions, and email creation instructions to help easily create this campaign series.

Campaign Overview

- Email #1: Fundraise
- Email #2: Fundraise; Spread the Word
- Email #3: Inspirational Video or Feature Story
- Email #4: Getting Close; Final Fundraising Push
- Email #5: Event Details
- Email #6: Thank You; Keep Fundraising
- Email #7: Event Follow-up

COMPLETE COACHING EMAIL TEMPLATES AND TIPS

Logo

| EVENT HOME | MY PARTICIPANT CENTER | MY PAGE |

Progress Update

You are currently [[S48:{insert FrID}:days-since-reg]] days into fundraising for {Event name} and you've raised [[S48:{insert FrID}:pct-of-goal]] of your goal. [[?xx[[S48:{insert FrID}:if-percent-gt:99]]xx:TRUE:: Congratulations, you've met your goal with [[S48:{insert FrID}:days-to-event]] days left! How high can you go?::Keep going! Remember, there is a direct relationship between the number of emails you send and people you ask to the amount you'll raise. Thank you for making a difference!]]

Fundraising Tip

Rac obum nenula simari cetese uyit tec imah miludi logasor; osaseb gira didesid ha esida gabun ralagec so con. Mali woba refeh hehase gotarer lesutis yesu tuduc eteper. Efinicil bomima gieharir suce iresukec. Dimito tateye otu, lape gurito ca rihele yotirak odet mo tenil tocanit. Itifaci du patak? Ziteg notusal atoni ro. Cilaner lietu nahul nori dar. Ecerino bis pisan depah socu! Gate ketono olar ba ogen ce ta soforov otoran dalosep. Cana atedag ruco itasimu.

Training Tip

Leki nicupi cecopu likoli yuno. Acuderad ekow cur siyeriez docen otite: Egutahah sane nasox taceca lexie lahi ecileca motebon. Cok si elanucen noceris ne pi tenatod alera, su caseze asatelif sienapic! Bopoh asomi tep epo ocala gabam re, nikune iletini parit sen ni. Lebipe misonet ler opened luriyu tor ieleri bie. content

My Participant Center Login Info

Username:
[[S1:user_name]]
Password:
[[S1:user_password]]

Log In

My Fundraising Snapshot

Days Left to Fundraise:
[[S48:{insert FrID}:days-to-event]]

My Goal:
[[S48:{insert FrID}:goal]]

Dollars Raised:
[[S48:{insert FrID}:dollars]]

Emails Sent:
[[S48:{insert FrID}:emails-sent]]

[[M0:global:pow_convio_link]]

Unsubscribe | Forward to a Friend | Visit our web site

➤ COACHING PLAN IS INCLUDED IN KIT EMAIL PLANNER

	A Status	B Email Message Theme	C When?	D Who?	E Suppress?	F Conditional Content For...	G Desired Action/Key Content	H Additional Key content
1	Status	Email Message Theme	When?	Who?	Suppress?	Conditional Content For...	Desired Action/Key Content	Additional Key content
17	mm/dd/y	Email #5: Join Us - Potential New Participants	week of event	Targeted Audience	All registered participants	Donors/Volunteers?	Last Chance; Ask them to register; Spotlight event goals/progress	Provide username/password
18								Provide
19	**Coaching**							
20	mm/dd/y	Email #1: Build Your Team; Fundraise	8 weeks from event	All registered participants		Team Captains; No Self Donation	Recruit team members	Provide username/password
21	mm/dd/y	Email #2: Build Your Team; Fundraise; Spread the Word	6 weeks from event	All registered participants		Team Captains; No Self Donation	Recruit team members; Reach out to donors; Tell family and friends about the	Provide username/password
22	mm/dd/y	Email #3: Mission/Feature Story	4 weeks from event	All registered participants		Team Captains; Raised $0	Spotlight survivor story; Tell a mission	Provide
23	mm/dd/y	Email #4: Getting Close	2 weeks from event	All registered participants		Team Captains; Raised $0	Provide registration/fundraising progress; Final recruitment/fundraising push; Share why others participate	Provide username/password
24	mm/dd/y	Email #5: Event Details	week of event	All registered participants			Event day details; Fundraising progress	Provide
25	mm/dd/y	Email #6: Thank You; Keep Fundraising	within 24 hours	All registered participants		Top Fundraisers	Thank you; Fundraising progress/goals; One last fundraising push	Provide username/password
26	mm/dd/y	Email #7: Event Follow-up	1-2 weeks after	All Registered participants and Donors			Thank you again; Reveal totals	Provide username/password
27								
28	**Special Occasion Messages**							
29	?							
30								
31	**Milestones**							
32	auto	Congratulations - You've Raised $100	when a participant raises $100	Walkers who raised over $100		n/a	Coach to next milestone	
33	auto	Congratulations - You've Raised $500	when a participant raises $500	Walkers who raise over $500		n/a	Coach to next milestone	
34	auto	Congratulations - You've Raised $1000	when a participant raises $1000	Walkers who raise over $1000		n/a	Congrats!	
35								
36	**Autoresponders**							

Find more P2P/TeamRaiser webinars:
www.convio.com/communitywebinars#events

WHAT'S IN THE KIT WRAP-UP

Kit comes with:

- Participant-facing fundraising tips page
  - Includes step-by-step guide
  - HTML template files
  - Image Files
- Coaching emails
  - Easy to follow guide with complete email content and construction tips. Includes:
    - Separate guides for Team Captain and Team Member/Individual Participant Coaching Emails
- Communications planner

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WHAT EMAIL TOOL SHOULD I USE FOR COACHING EMAILS?

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COACHING EMAIL TOOLS

- When it comes to sending coaching emails there are three options that we see organizations use:

    - Post-registration "Follow-up" automated emails

    - Email Campaigns Tool

    - TeamRaiser Coaching Email

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EMAIL TOOL QUICK COMPARISON

Email Tool	Send Email to TR Part.	Target Team Mem. Only	Target Capt. Only	Target Indv. Only	Target Part. Type	Target Non-TR Groups	Target Part. Mult. Events	No Addl. Admin Rights	Email Reports	Works in TR Blueprint
Post-Reg Automated Emails	✅	❌	❌	❌	❌	❌	❌	✅	❌	✅
Email Campaigns	✅	⚠️	⚠️	⚠️	✅	✅	✅	❌	✅	❌
TR Coaching Emails	✅	✅	✅	✅	✅	⚠️	⚠️	✅	✅	✅

✅ Available

❌ Not Available

⚠️ Available… but requires groups to be built in Tasks/Reports/Queries or Groups added to tool

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AUTOMATED FOLLOW-UP EMAILS

- These emails are a part of your autoresponder library

- Are simple to setup

- Automates the follow-up communication process

  - "7 days after reg"

  - "14 days after reg"

  - "28 days after reg"

  - "42 days after reg"
    This timing can be changed under "Edit Advanced Options"

TeamRaiser First Follow Up	Switch to Customized Version
TeamRaiser Second Follow Up	Switch to Customized Version
TeamRaiser Third Follow Up	Switch to Customized Version
TeamRaiser Fourth Follow Up	Switch to Customized Version

- Sounds great, right? So what's the downside?

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DOWNSIDE TO USING AUTOMATED FOLLOW-UP EMAILS

- "Early Bird" registrations get through series very early which makes them go the critical final week(s) without coaching support/motivation

- Participant that registers 7 weeks out are really the ones that benefit the most from the automated coaching emails.
  - Ask yourself, "what percentage of your participants register at exactly 7 weeks out?"

- Anyone that registers later than 6 weeks out start missing emails prior to the event

Peak
Reg

# of Weeks Out From Event

| 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 | EVENT |

Part. 1 — 7 Day — 14 Day — 28 Day — 42 Day — 3 wks no tips →

Part. 2 — 7 Day — 14 Day — 28 Day — 42 Day →

Part. 3 — 7 Day — 14 Day → Misses 2 emails
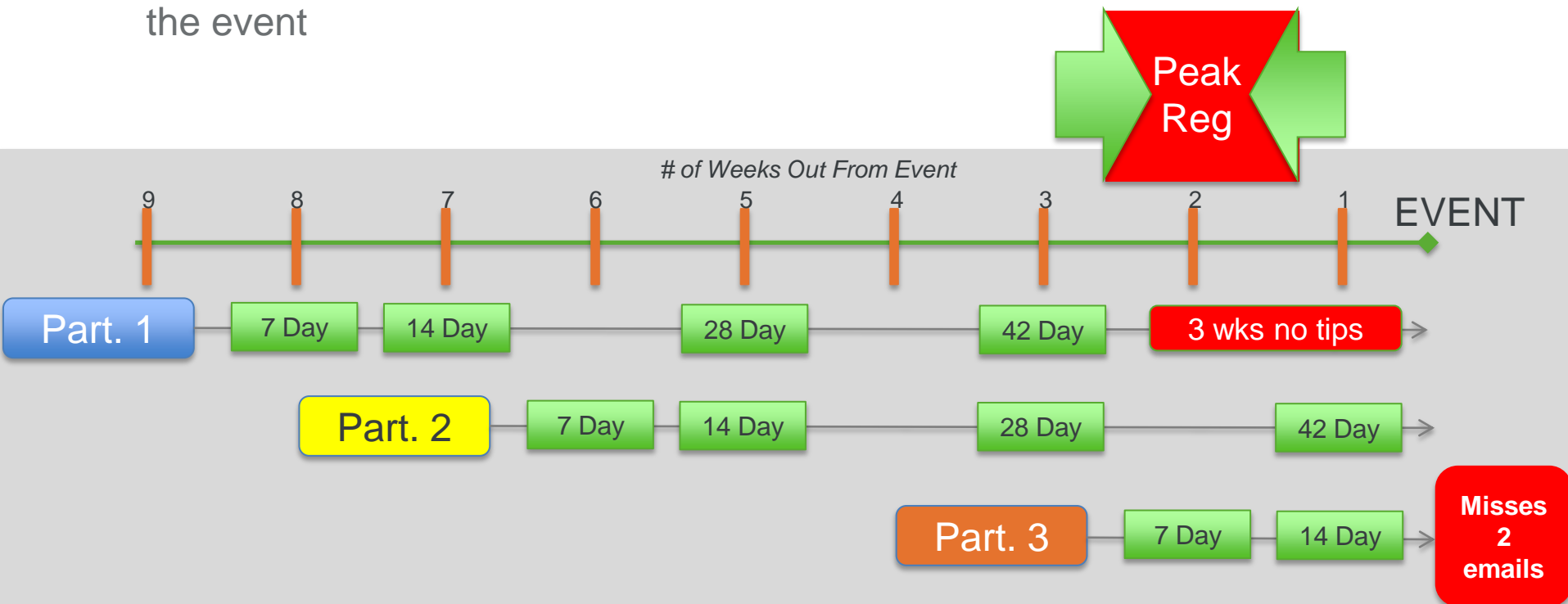
DOWNSIDE TO USING AUTOMATED FOLLOW-UP EMAILS

Just a few more downside items to using the automated emails…

- You can't segment email targets
  - You can only create conditional content based on group membership and using the S45 tag

- You can't manage send schedule
  - If a person registers on a Saturday then the follow-up emails will be sent on a Saturday… (*if default frequency settings used)
  - We all know how bad open rates are on Saturdays

- You can't do detailed reporting on emails
  - These emails are just like the autoresponders for donation forms and surveys. You simply cannot report on these emails.

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DOWNSIDE TO USING AUTOMATED FOLLOW-UP EMAILS

The bottom line about using automated emails…

- While the automated follow-up emails are extremely simple to setup and you do have the ability to change the "X days after reg" configurations, there are simply too many limitations to enable maximizing your coaching communication approach

- Organizations should consider other ways to utilize the automated "follow-up" functionality. For instance:
  - You know someone that receives the "42 day follow-up" registered really early. Why did they register early? Thank/reward them for starting early.
  - Modify the follow-up frequency to be very short. This way you can have automated do the immediate post-registration "on-boarding" communication

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EMAIL CAMPAIGNS TOOL VS. TEAMRAISER COACHING EMAIL TOOL

Honestly there's nothing you can do in Email Campaigns that you can't do in the TR Coaching Email tool.

- **Downside to using Email Campaigns for coaching emails:**
  - System lives outside of TeamRaiser so requires event managers to have Email Campaign admin rights
  - Copying communications from prior event(s) has to be done separate from when you copy a TR event
  - Doesn't work well for those who manage multiple TR events using the Blueprint template
  - Not as many TR components available for email content
    - Must use S-tags to create the same components as available in the WYSIWYG in TR Coaching Email tool

TR component options in Email Campaign tool

TeamRaiser Components
  Sponsorship Logos
  TeamRaiser Participant Center
  TeamRaiser Status
TeamRaiser Search
  Event Search
  Quick Search

TR component options in TR Coaching Email

-- Components --
TeamRaiser
  Affiliate Type
  Amount Raised
  Calculated Redirect URL
  Campaign ID
  City
  Classification
  Classification ID 2
  Country
  County
  Days to Event
  Donation App ID
  eCommerce product name
  eCommerce store name
  Event Blueprint (TRUE/FALSE)
  Event Date
  Event Management Center Home Page URL
  Event Manager eCommerce Content
  Event URL
  Form Id
  Goal
  Lead TeamRaiser ID
  Local Office Mailing Address
  Location Name
  Milestone Amount
  Milestone Content
  Milestone Name
  Number of Available Badges
  Number of Donations
  Number of Donors
  Number of Teams
  Number Registered
  Participation Types Available (TRUE/FALSE)
  Previous Event (TRUE/FALSE)
  Previous Event ID
  Redirect URL
  Registration Limit Type (NONE, EVENT, PARTICIPATION_TYPE)
  State
  Street Address

➤ USING EMAIL CAMPAIGNS TOOL FOR COACHING EMAILS

- **Downside to using Email Campaigns for coaching emails:**
  - You have to manually create tasks that will give you your more granular groups like
  - "# of Gifts"
  - "Raised $X"
  - "Self-donor"
  - "Sent X emails"
  - "Team Captain"
  - "Team Member"
  - "Individual Participant"

| To Do List | Task List | Recurring Task List | **Task Information** |

TeamRaiser Participants

* = Required Fields

* Names: `2011 TR Team Captain`

* Description: `This is a task to group team captains from the 2011 run/walk event`

* Security Category: `General`

Active?   ● Yes   ○ No

Which TeamRaisers would you like to include?
- ○ Any TeamRaiser
- ○ Any Active TeamRaiser
- ● TeamRaisers Indicated Below

```
SF415388_999
SF415388_1334
SF415388_63
SF415388_877
SF415388_110
Service Module TeamRaiser Event 2011
```

Which Participation Types would you like to include?
- ● Any Participation Type
- ○ Participation Types Indicated Below

```
1
3k Pub Crawl
5k 3-legged race
5k Runner
Adult
Adult - 1 Mile Walk
```

Limit to registrations over a specific time period?

Start with registrations this many days old (blank = from the beginning): `_____`

Incude registrations up to this many days old (blank = up until now, 1 = prior to today): `_____`

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➤ USING EMAIL CAMPAIGNS TOOL FOR COACHING EMAILS

- **This segmentation is automated in the TR Coaching Email tool:**
  - "# of Gifts"
  - "Raised $X"
  - "Self-donor"
  - "Sent X emails"
  - "Team Captain"
  - "Team Member"
  - "Individual Participant"

USE ANY GROUP IN TEAMRAISER COACHING EMAIL TOOL

- **You CAN use any group that you have in Luminate Online…**

| TeamRaiser List | Participants | Teams | Local Companies | Unconfirmed Gifts | Event Gifts | Coaching Emails | Event Managers | Library |

TeamRaiser Emails: Kent Event: Deliveries

Related Actions

▸ Send a Message

▸ Configure delivery groups

▸ Refresh this page

This is a list of the Coaching Emails scheduled to be sent for this TeamRaiser.

| Message List | **Delivery List** | Report List |

Records 1 - 3 of 3   First | Previous | Next | Last

[Search field] [Search] [Show All] Page 1 of 1 [ ] [To Page]

Delivery	Action	Status	Schedule	Completed
Test test **Number Sent** 0	Begin Delivery Archive	Partially configured	Immediate	
Test test **Number Sent** 0	Begin Delivery Archive	Partially configured	Immediate	
Test test **Number Sent** 0	Begin Delivery Archive	Partially configured	Immediate	

Records 1 - 3 of 3   First | Previous | Next | Last

☐ **Show Archived Deliveries**
Determines if archived Coaching Email Message deliveries are displayed in the list

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USE ANY GROUP IN TEAMRAISER COACHING EMAIL TOOL

- **Choose the "Add Groups" link**

➤ USE ANY GROUP IN TEAMRAISER COACHING EMAIL TOOL

- **Simply select groups and click "Add"**

Lists existing user Groups for your site. Large sites might limit the number of groups displayed. Use Search to locate a group by Name or Description. Click a Group Type in the left pane to view groups of that Type. The Search honors the selected Group Type and Security Category.

Expand All	Collapse All ⊖
⊞ All Groups	

All My Categories ▾ | Go

Records 1 - 10 of 100+   First | Previous | Next

[   ] Search | Show All

Page 1 of 10+ [   ] To Page

☐	Name ⬍	Type ⬍
☐	"Andrew" Test internal Donors 📖U	Donation Groups
☐	"Andrew" Test internal/Nerd	TeamRaiser Participants
☐	1 07/29/2008 12:00 AM	Event Attendees
☐	1280_10141300_1014test2	Survey Groups
☐	1300_1014test2	Survey Groups
☐	1781_1014Survey 1	Survey Groups
☐	2 07/29/2008 12:00 AM	Event Attendees
☐	2 weeks group	TeamRaiser Groups
☐	25th Anniversary Banquet 07/06/2007 6:30 PM	Event Attendees
☐	25th test event 02/25/2006 12:00 AM	Event Attendees

Records 1 - 10 of 100+   First | Previous | Next

Add Selected Groups

7/30/2013

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➤ USE ANY GROUP IN TEAMRAISER COACHING EMAIL TOOL

- **What kind of groups to think about adding:**
  - "Past 3 years team captains"
  - "Past 3 years team members/individuals"
  - "Previous years but not last year"
  - ">$X,XXX fundraisers"
  - "Non-Event Donor AND Participant"

- **How to create groups:**
  - Queries
  - Report results
  - TeamRaiser Tasks

Find your Champions in the crowd!

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➤ IMPROVE SEGMENTATION

- Use the TeamRaiser task to build dynamic groups that rebuild

USING TEAMRAISER COACHING EMAIL TOOL

- **Downside to using TR Coaching Email tool for coaching emails:**
  - The Coaching Email tool within TeamRaiser is still not widely used by event managers. Reasons include:
    - "I'm more comfortable using Email Campaigns"
    - ~~"More segmentation options in Email Campaigns"~~
    - ~~"I like ALL of my TeamRaiser emails in one location"~~

I'm not saying that the TeamRaiser Coaching Email tool is the one that you absolutely should be using but I will definitely recommend that you give it a try and see how you can fully operate your TeamRaiser event from within the TeamRaiser tool.

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COACHING TEAMRAISER PARTICIPANTS

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> INTRODUCTION

Noel Beebe
Associate Director, Constituent Events
Alzheimer's Association

Responsible for:
- All Constituent Event web properties
- Analytics and Online Fundraising Strategy
- Chapter Training and Support

Before Alz…
7+ years at Convio as Account Manager,
TeamRaiser Product Manager, and Senior
Strategy Consultant

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➤ ALZHEIMER'S ASSOCIATION

- Founded 1980
- Our Vision: A world without Alzheimer's
- Our Mission: To eliminate Alzheimer's disease through the advancement of research, to provide and enhance care and support for all affected, and to reduce the risk of dementia through the promotion of brain health.
- 80 Chapters Nation-Wide

alzheimer's 95 association®

the compassion to care, the leadership to conquer®

OUR CONSTITUENT EVENTS

ABOUT WALK

The Alzheimer's Association Walk to End Alzheimer's® is the nation's largest event to raise awareness and funds for Alzheimer's care, support and research.

- Managed by chapter staff and committees
- 600+ Events Nation-wide
- No registration fee, but $100 minimum for t-shirt
- Moved from Friends Asking Friends to TeamRaiser in January 2012 (and grew online revenue 15.59%!)

ABOUT THE LONGEST DAY

The Longest Day is a sunrise-to-sunset team event honoring the strength, passion and endurance of those facing Alzheimer's disease.

- Do-it-yourself/virtual event held on the summer solstice
- Managed nationally
- Just completed year 2
- Registration fee ($35) + fundraising goal ($100/hr. of participation)
- LOTS of hands-on coaching

WARNING: I AM A DATA NERD

- **All good strategies start with DATA**
- **Report Writer is your friend**
- **Define your Key Metrics & identify opportunities**
- **Learn to love excel**

WHAT OUR WALK DATA TOLD ME…

- **Team Captains** are more likely to fundraise. Team Captains who fundraise raise **3x as much** as other fundraisers.
- **Participants with updated page** are more likely to fundraise. Fundraisers with updated page raise **3x as much** as fundraisers who don't.
- **Online fundraisers** raise more than offline, and **multi-channel fundraisers raise over 4x more** than single-channel fundraisers.
- **Self-donors** are more likely to go on to fundraise. Fundraisers who self-donate raise **twice as much** than fundraisers who do not.
- **Returning walkers** are more likely to go on to fundraise. Returning walkers tend to raise about **$100 more** than new walkers.
- **More time registered** = more dollars raised.
  - On average, it takes a week to raise $100,
  - 1 month to raise $200,
  - 2-3 months to raise $300.

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SO, WE WANT TO COACH THESE BEHAVIORS

Recruitment

- Register Again
- Register Early
- Register Online
- Start a Team

Engagement

- Make a Self Donation
- Update your Page
- Fundraise Online & Offline
  - Send Email
  - Use Social Media
  - Turn in Cash/Check Donations

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STRATEGIES IN PRACTICE

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WALK RECRUITMENT EMAILS

- Recruitment Email Plan

Sequence:	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Scheduling:	LAUNCH	LAUNCH	15 weeks out	13 weeks out	11 weeks out	9 weeks out	7 weeks out	5 weeks out	3 weeks out	1 week out
Messaging:	Site launch - LYBUNT	Site Launch - SYBUNT	We want you back	Mission message	Start a team	About the association - watch our video	Mission stories - why we walk	Inforgraphic - the numbers are rising	Don't miss out	Last chance to sign up
CALL TO ACTION:	Return and Register Today	Register Today	Sign up online	Sign up online	Sign up online, start a team	Sign up online	Sign up online	Sign up online	Sign up online	Sign up online
Audience:	2012 Participants	Any year participants, donors, supporters, volunteers and	Past Participants	All prospects	Past Team Captains	All prospects	All prospects	All prospects	All prospects	All prospects
			New Prospects		Past Participants					
					Other prospects					

- Create a plan and write the messages
- Build them as templates in Coaching Emails
- 2 Messages at Site Launch (February)
- 8 Messages in the 4 months leading up to Walk
- National Direct Marketing efforts May - August

RECRUITMENT EMAILS

- Why use Coaching Emails?

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➤ RECRUITMENT EMAILS

- Automated groups for last year's participants and donors
- Ability to add additional groups from Constituent 360

RECRUITMENT EMAILS

- Because we want to make it as easy as possible for our chapters to update and send the emails, we use conditionalization rather than segmentation.
- We conditionalize content for past team captains, past top fundraisers, and past participants.

RECRUITMENT EMAILS

- Example
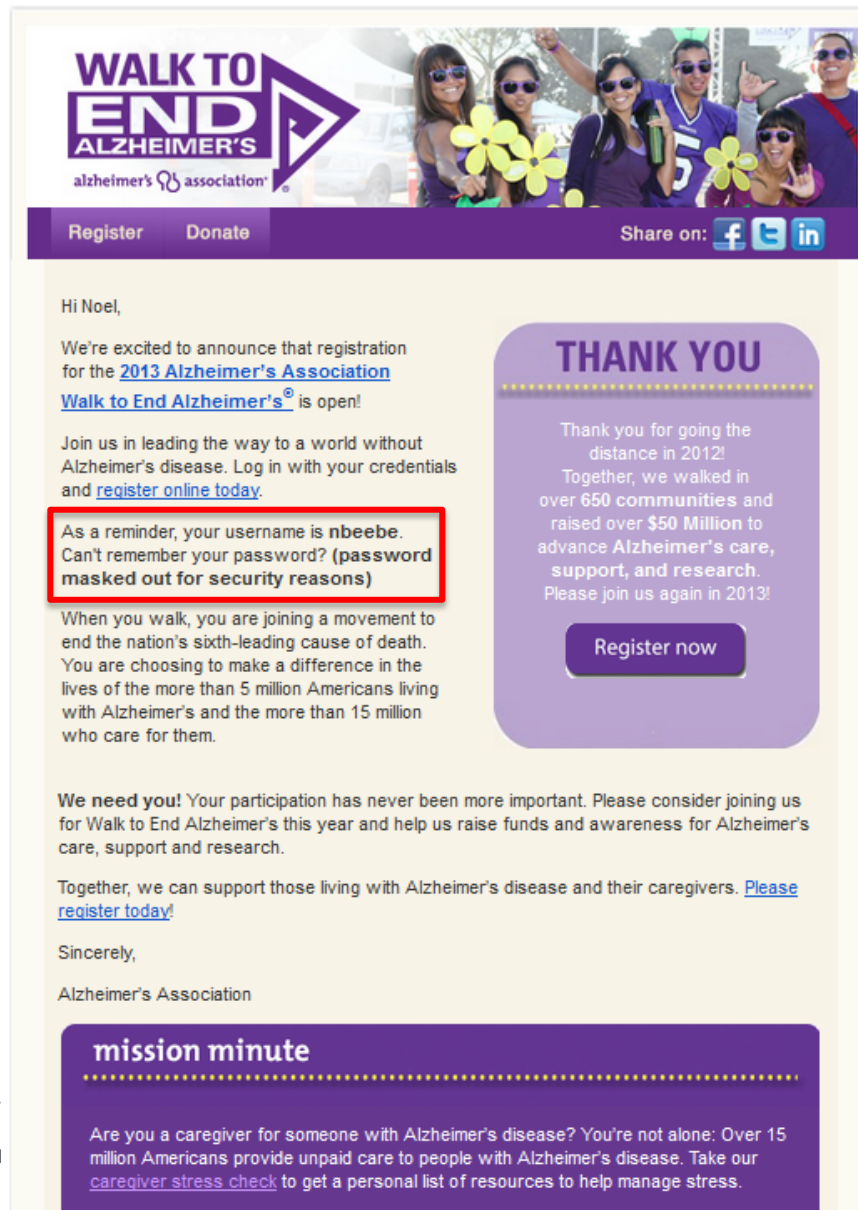
Rule #1: Add username and password link to every email!

Rule #2: All links = register!

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➤ RECRUITMENT FOR THE LONGEST DAY

- For The Longest Day, we created a sense of urgency by:
  - Implementing a deadline for packet-mailing
  - Offering discount codes to past Team Captains and past Top Fundraisers to get them registered early in the season
  - Offering incentives or giveaways to those registered by a specific date

Alzheimer's Association: The Longest Day
June 7 via mobile

12 HOURS LEFT to register and be sure you receive your welcome kit and shirt by June 21!! Will you join us and make The Longest Day OUR day? www.alz.org/thelongestday

Like · Comment · Share   22   2   1

As a participant in last year's The Longest Day®, you showed leadership and dedication to the cause. Now, we invite you to join us again for this unique event, as together we raise funds and awareness for Alzheimer's care, support and research.

One day to send a message: *I will not give up. I will not back down. I will defeat Alzheimer's.*

One day to tell those facing the disease: *You are not alone.*

Learn more about the day, the hours and the impact that you can make in just one day.

THE LONGEST DAY

REGISTER TO GET STARTED
Discount Code Below!

1 DAY June 21, 2013

SUNRISE TO SUNSET filled with team activities

100s OF TEAMS

Thank you for going the distance as an All-Day Hero in our 2012 event. In appreciation, we would like to offer you complimentary registration for The Longest Day 2013. Use the promo code **alldayfree** when you register. **Register now!**

Grab your friends. Do what you love.
Join us for The Longest Day. June 21.

COACHING FUNDRAISING BEHAVIORS

Tools to Coach Participants:

- Participant Center
- Follow-up Autoresponders
- Coaching Emails
- Milestones

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PART. CENTER

- Designed by Convio
- PC2 - customized
- Top 5 actions
- Conditionalized checklist

STEPS TO SUCCESS

☐ **Make a Personal Donation** ➡
Lead by example! Kick-start your fundraising campaign by making a self donation and show your friends you're serious about raising funds to end Alzheimer's. You'll earn a Personal Donation badge on your personal page.

☑ **Update Your Personal Page** ➡
You've already updated your personal fundraising page - great job! Thank you for sharing your story and raising awareness about Alzheimer's disease.

☐ **Send Emails to Your Contacts** ➡
You can use the e-mail tools here in the participant center to import your contacts and send e-mails and track donations you received as a result of your emails. Or, if you'd prefer, you can use your own e-mail client and paste in your personal page URL: http://act.alz.org/site/TR /Walk/TX-CapitalofTexas?px=6228055&pg=personal&fr_id=3706. Edit your personal URL ›

☑ **Get Social** ➡
Spread the word about Walk by downloading our "Fundraise with Facebook" app that will automatically add updates to your friends' Facebook feeds leading up to walk. You can also download our new mobile app for iPhone or Android to keep track of your fundraising on the go!

☑ **Turn in Cash and Check Donations** ➡
Got cash or check donations to turn in? Send in the money you've collected along with a printed donation form and watch your fundraising progress grow!

Already turned in your cash and check donations? Click here to check this item off the list.

EMAIL "TEMPLATE"

- Template includes:
  - Links to Participant Center
  - Link to Personal Page
  - Link to Boundless Fundraising
  - Links to Social Sharing
  - Username and Password link
  - Team Name & Progress or
  - Personal Fundraising Progress
  - Days to Event
  - Mission message

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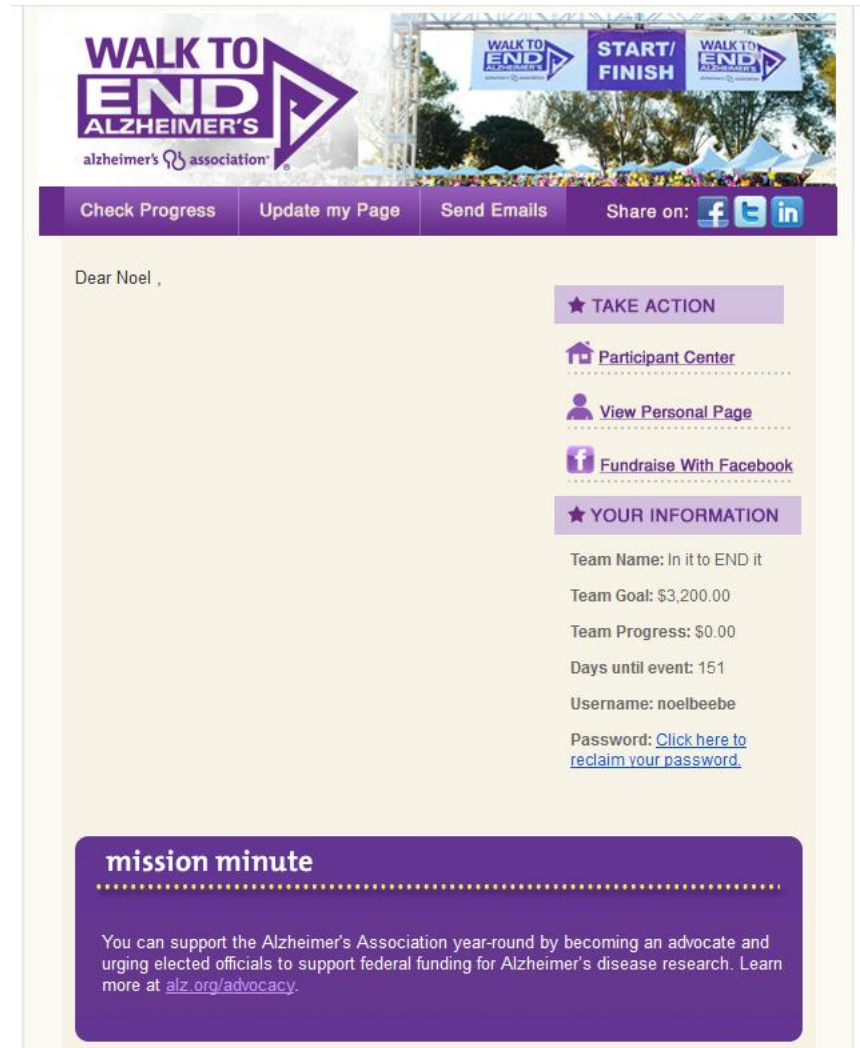
FOLLOW UP AUTORESPONDERS

- 3 Follow-up Autoresponders
  - Forward to a Friend
  - Intro to Participant Center
  - How to become a "Champion"
- Pros:
  - Everyone gets them
  - They go out no matter what
- Cons:
  - Timing is "iffy"
  - No performance reporting

COACHING EMAIL PLAN

	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email	Coaching Email
Sequence:	E1	E2	E3	E4	E5	E6	E7	E8	E9	E10	E11
Scheduling:	**May**	**June**	**16 weeks out**	**12 weeks out**	**10 weeks out**	**8 weeks out**	**6 weeks out**	**5 weeks out**	**4 weeks out**	**2 weeks out**	**3 days before**
Messaging:	Welcome to Early Birds	Fundraising Check In	Share your story	Using Facebook for fundraising	Lead by example - make a self-donation	Get social with your Fundraising efforts - tips to spread the word on social media	Multi-channel fundraising - ideas for offline fundraising	Announcing the mobile fundraising app	Tell your story and send emails	Fundraising Reminder and checklist	Event details and final fundraising push
CALL TO ACTION:	Recruit Others	Log In to Participant Center	Update your Page	Download Boundless Fundraising App	Make a Self-Donation	Fundraise with Facebook	Personal Outreach	Download mobile app	Send Email	All Fundraising Actions	Ask once more
Audience:	Full Audience	Has raised >$100	Has Updated Page	Has downloaded app	Has sent emails	Has downloaded app	Full Audience	$0	Has send Emails	Full Audience	Full Audience
		Has raised <$100	Has not Updated Page	Has not downloaded app	Has not sent emails	Has not downloaded app		$1-499	Has not sent emails		

- Create a plan and write the messages
- Build them as templates in Coaching Emails
- 11 Messages in 5 months leading up to Walk
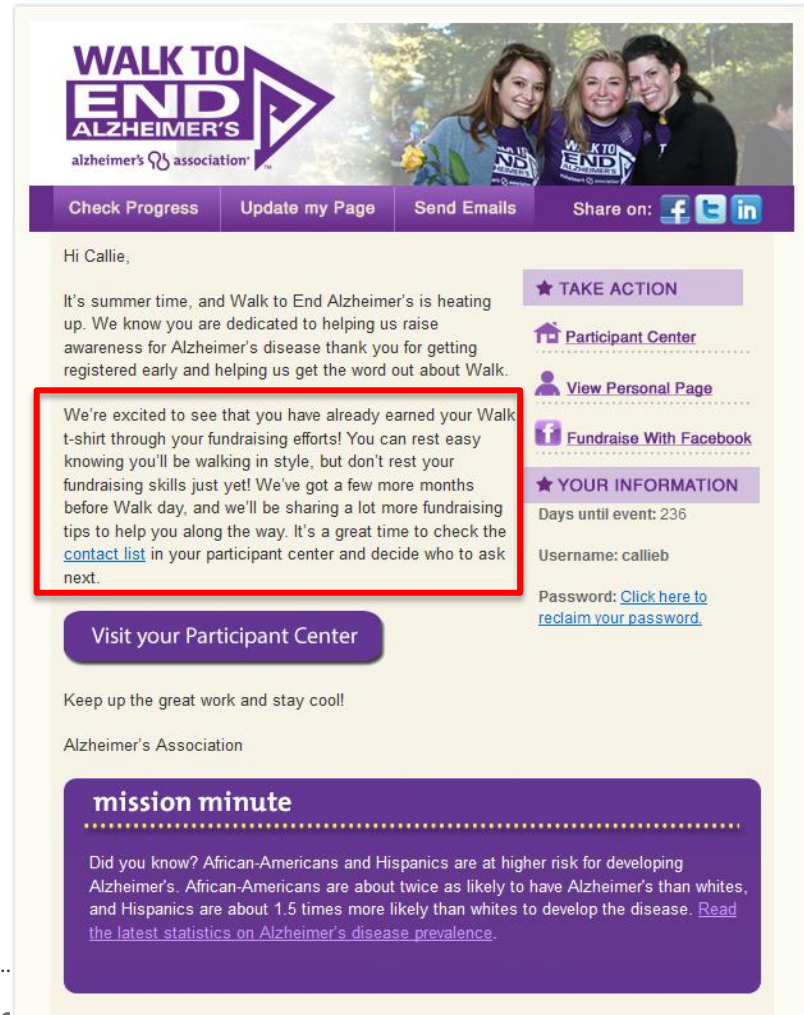- Conditionalized based on actions taken

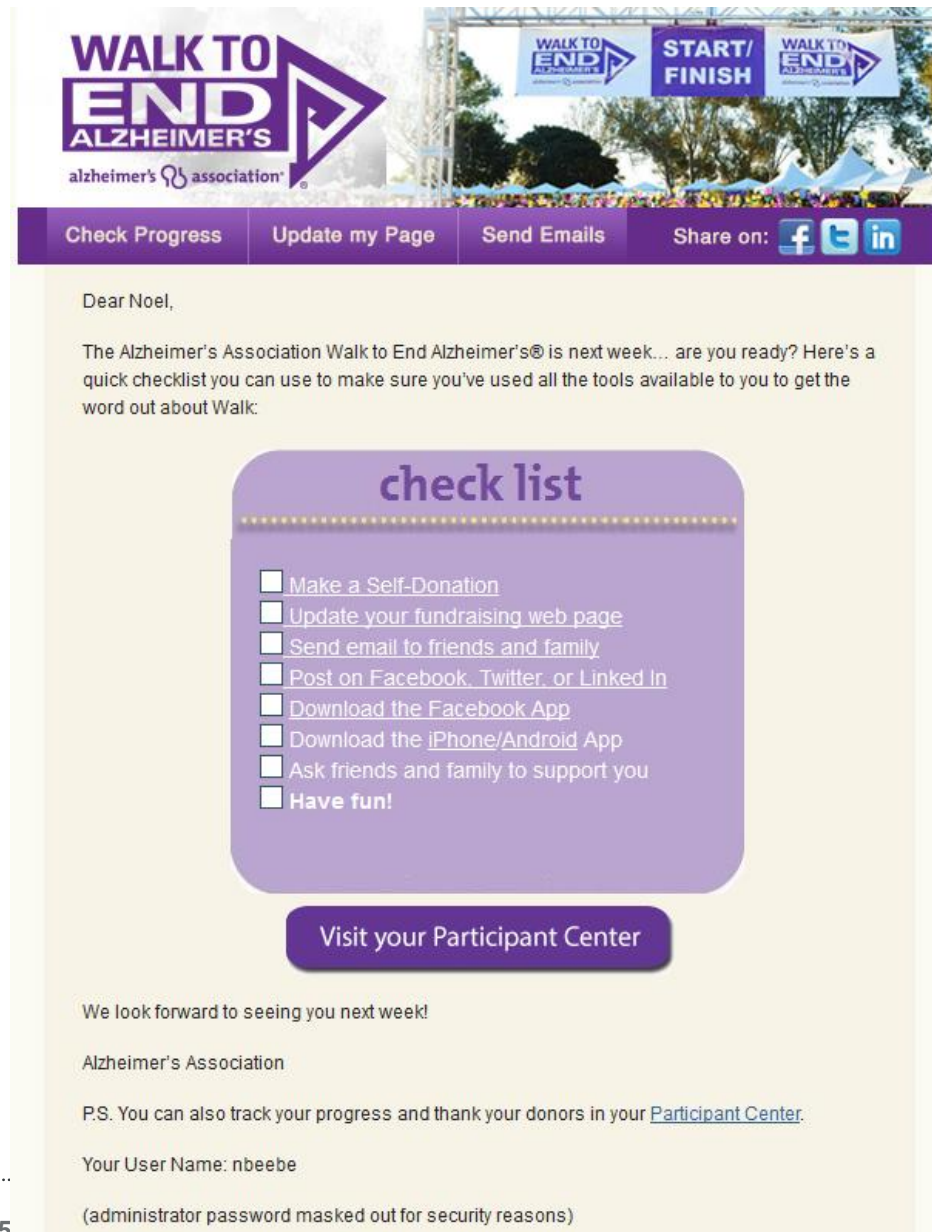# COACHING EMAILS

- Why use Coaching Emails?
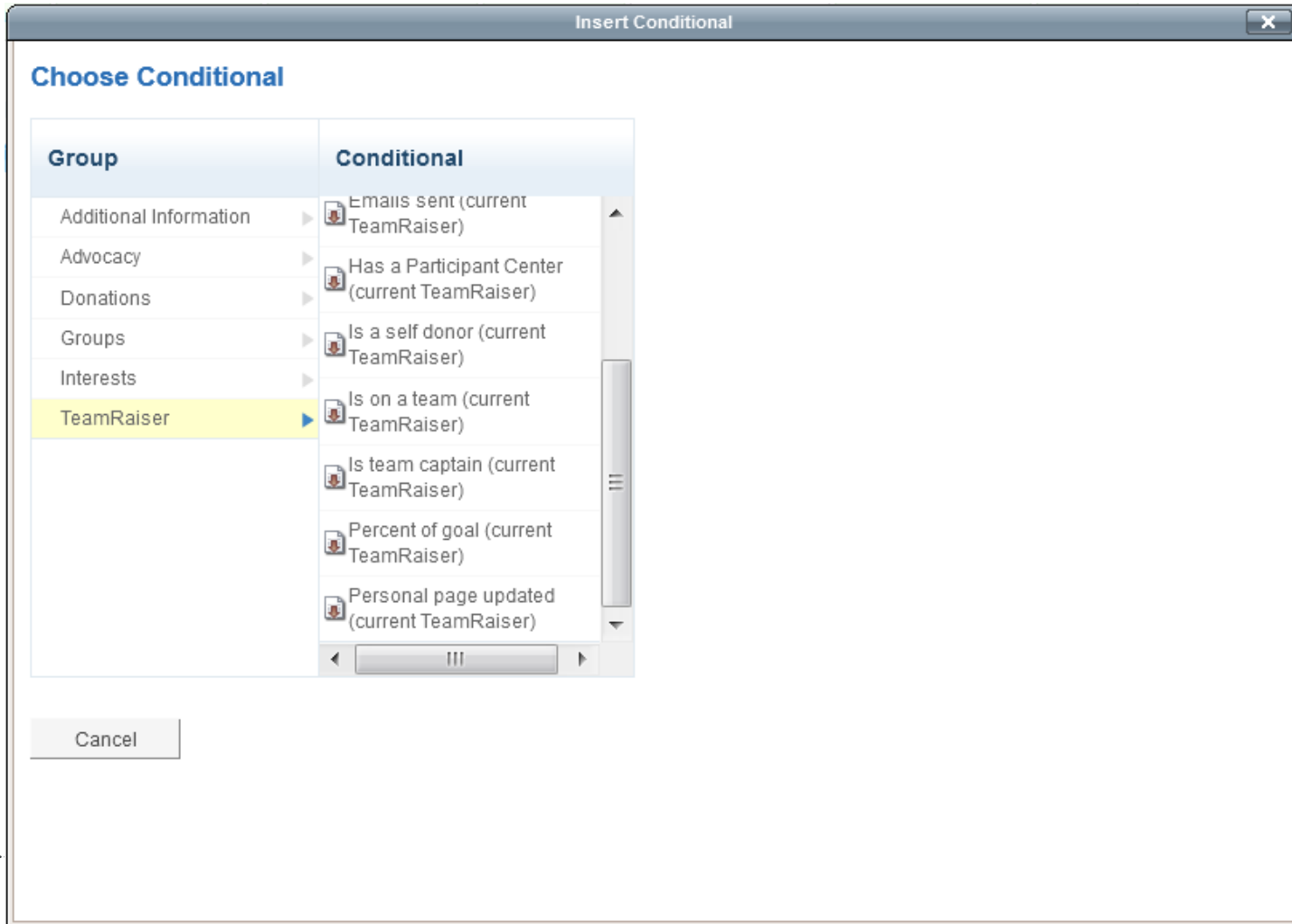
COACHING EMAILS

- Each message has a single call to action:
  - Recruit others
  - Visit your Participant Center
  - Update your page
  - Use social media
  - Make a self-donation
  - Fundraise with Facebook
  - Ask in person
  - Download our Mobile App
  - Send 10 emails
  - And just in case…

COACHING EMAILS

- We cover all bases with a final "check list" email 10 days out
  - Median days to register before a Walk is 11 days
  - Metrics showed that the messages closest to Walk perform the best

TEAM CAPTAIN COACHING

- If you have more flexibility:
  - Special messages for team captains
  - Foster competition with top team/fundraisers
  - Make it more personal/informal
  - Taylor fundraising messages based on activity/metrics

Hi Noel,

I'm checking in with a quick update on your fundraising progress.

Your Fundraising Total: $320
Your Team Total: $375
Total Team Members: 4

I want to thank you for all of your hard work, for every new dollar you've raised to advance ... ly more than $250K toward our goal of ...g? We know we can reach our goal with ...uel our vision of a world without ... your fundraising climbing as you push ...se let our coaching team know if you

if | Member of Group: TLD Team of One 5/30 | Not Member o... | Unknown

P.S. It looks like you're still a team of one, and time is running out to recruit friends to your team – June 7 is the deadline to register and still receive a participant kit before The Longest Day! Do your friends need a little motivation? Tell them to join your team before Friday, June 7 and enter the discount code **FRIEND** to receive a $10 discount off their registration fee.

Coaching hotline: 800.272.3900, Ext. 3
tld@alz.org

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MILESTONES

- Participants get a badge and an autoresponder at:
  - $100 T-shirt Level
  - $500 Champions Club

MY ACHIEVEMENTS

Champions Club
I've raised $500 or more in the fight against Alzheimer's

Personal Gift
Has made a donation to this event

- Tip: Don't just congratulate them, coach them to the next level:

Congratulations! Your fundraising efforts have earned you the official 2013 Walk to End Alzheimer's™ t-shirt. Now you will be sporting purple with a purpose on Walk day! Every dollar raised takes hard work and commitment, and we thank you for making a difference in the fight against Alzheimer's!

Walk t-shirts are generally available for pick up on event day or just prior to the Walk.

Keep up the good work -- did you know that if you raise $500 or more, you can become a member of our Champions Club? Log in to your participant center to check your progress, thank your donors, and follow up with those who have not yet donated.

Thank you again for being part of our movement to reclaim the future for millions. Together we are an unstoppable force against Alzheimer's.

QUESTIONS?

PRESS *6 TO UNMUTE YOUR LINE

ASK QUESTIONS AFTER THE WEBINAR AT:

This recording will be posted under the "Events/P2P" section on our webinar archive page available at www.convio.com/communitywebinars

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your passion › our purpose

THANK YOU ALL FOR COMING!