



LUMINATE COMMUNITY

MONTHLY WEBINAR SERIES

JULY 30, 2013

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A decorative graphic on the left side of the slide, consisting of a cluster of colorful squares in shades of red, orange, yellow, and blue, some of which are slightly blurred or faded.

LUMINATE COMMUNITY MONTHLY WEBINAR SERIES

JULY 30, 2013

BOOSTING YOUR TEAMRAISER COACHING COMMUNICATION

Presented July 30, 2013

blackbaudTM
your passion > our purpose

► 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.

► MEET YOUR PRESENTERS

Kent Gilliam

**Senior Programs Manager
Blackbaud**

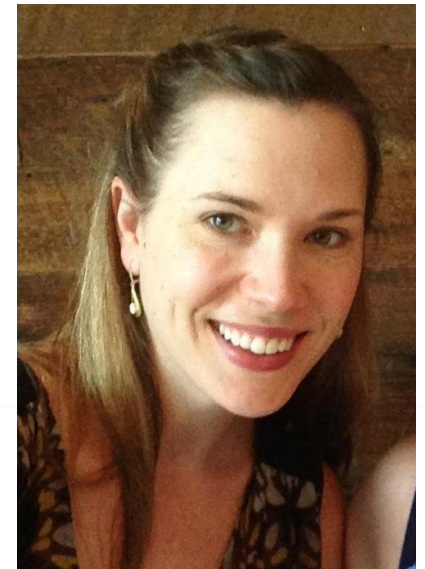
- 6 years working for DFW nonprofits
- 5 1/2 years at Convio/Blackbaud consulting/teaching online fundraising/marketing strategies and best practices



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



► **FREE KIT**

► 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.



- 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...

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- 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
- 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

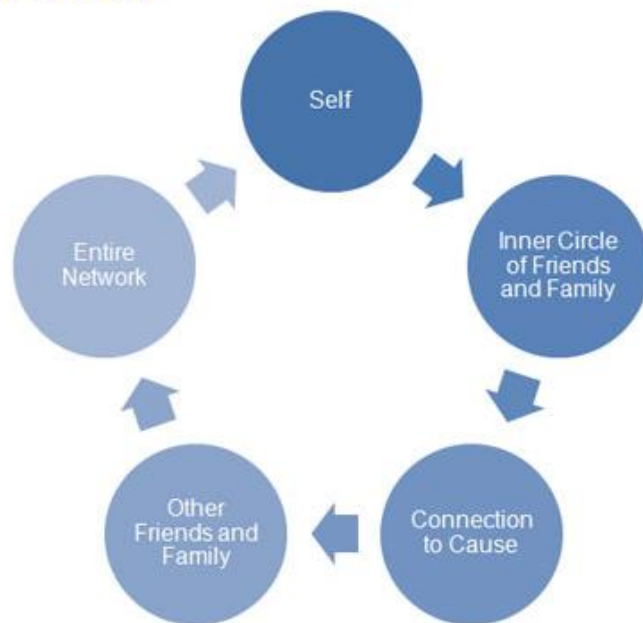
Use the tips below to help you reach your fundraising goals and help those we serve.

► 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



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

► COMPLETE COACHING EMAIL TEMPLATES AND TIPS

BLACKBAUD TEAMRAISER Team Captain Coaching Series Setup Document

blackbaud®

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 fundraise on your behalf.

This setup document will help you plan an email coaching series that includes 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: 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/Fundraising Push
- Email #5: Event Details
- Email #6: Thank You; Keep Fundraising
- Email #7: Event Follow-up

BLACKBAUD TEAMRAISER Participant Coaching Series Setup Document

blackbaud®

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. [[?x[[S48:{{insert FrID}}:if-percent-gt-99]]xc::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]]

[\[\[MC:global:pow_convio_link\]\]](#)

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



► COACHING PLAN IS INCLUDED IN KIT EMAIL PLANNER

	A	B	C	D	E	F	G	H
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	y							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	y							
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

























► WHAT EMAIL TOOL SHOULD I USE FOR COACHING EMAILS?



► 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

► 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

► 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”*

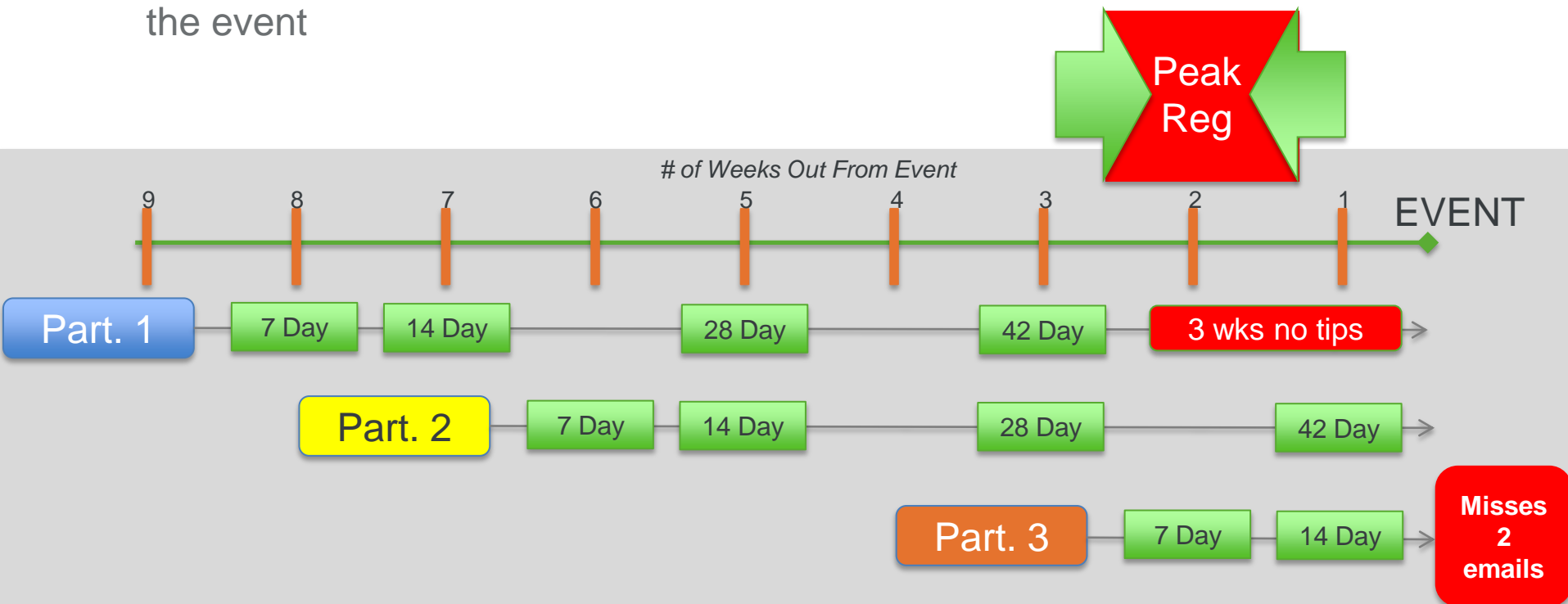
- Sounds great, right? So what’s the downside?

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



► 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



► **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.

► **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

► 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”

The screenshot shows a web form titled "TeamRaiser Participants" with four tabs: "To Do List", "Task List", "Recurring Task List", and "Task Information". The "Task Information" tab is active. The form contains the following sections:

- * = Required Fields**
- * Names:** A text field containing "2011 TR Team Captain".
- * Description:** A text area containing "This is a task to group team captains from the 2011 run/walk event".
- * Security Category:** A dropdown menu set to "General".
- Active?** Radio buttons for "Yes" (selected) and "No".
- Which TeamRaisers would you like to include?**
 - Radio buttons for "Any TeamRaiser", "Any Active TeamRaiser", and "TeamRaisers Indicated Below" (selected).
 - A list box showing several IDs: SF415388_999, SF415388_1334, SF415388_63, SF415388_877, SF415388_110, and "Service Module TeamRaiser Event 2011" (highlighted).
- Which Participation Types would you like to include?**
 - Radio buttons for "Any Participation Type" (selected) and "Participation Types Indicated Below".
 - A list box showing "1", "3k Pub Crawl", "5k 3-legged race", "5k Runner", "Adult", and "Adult - 1 Mile Walk".
- Limit to registrations over a specific time period?**
 - Text: "Start with registrations this many days old (blank = from the beginning):" followed by an empty text box.
 - Text: "Include registrations up to this many days old (blank = up until now, 1 = prior to today):" followed by an empty text box.

► 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”

The screenshot shows the 'Configure Additional Filters' screen in the TR Coaching Email tool. The top navigation bar includes tabs for TeamRaiser List, Participants, Teams, Local Companies, Unconfirmed Gifts, Event Gifts, Coaching Emails, Event Managers, and Library. The breadcrumb trail reads: TeamRaiser Emails: Kent Event: Deliveries > Registration Filters > Configure Additional Filters. On the left, a list of steps is shown: 1. Select Email Audience, 2. Select Participation Types, 3. Registration Filters, and 4. Team Filters. Under step 3, sub-items are listed: a. Donations Received, b. Participant Emails, and c. Unconfirmed Gifts. The main content area contains two sections: '1. Minimum Number of Donations:' with a text input field, and '2. Maximum Number of Donations:' with a text input field.

The screenshot shows the 'Team Filters' screen in the TR Coaching Email tool. The top navigation bar is the same as the previous screen. The breadcrumb trail reads: TeamRaiser Emails: Kent Event: Deliveries > Team Filters. On the left, a list of steps is shown: 1. Select Email Audience, 2. Select Participation Types, 3. Registration Filters, 4. Team Filters, and 5. Review Delivery Details. The main content area contains two sections: '1. Team Membership Filter:' with a description and five checkboxes (Individual participants not on a team, Team members, Team captains, Company coordinators of teams, Team members without a captain), and '2. Company Affiliation Filter:' with a description and three radio buttons (All participants whether company affiliated or not, Participants affiliated with any company team, Participants affiliated with the following company). Below these is a text input field for 'Name of the Specific Company:'. At the bottom, there are 'Next' and 'Cancel' buttons.

► 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

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

► USE ANY GROUP IN TEAMRAISER COACHING EMAIL TOOL

- Choose the “Add Groups” link

[TeamRaiser List](#) [Participants](#) [Teams](#) [Local Companies](#) [Unconfirmed Gifts](#) [Event Gifts](#) [Coaching Emails](#) [Event Managers](#) [Library](#)

[TeamRaiser Emails: Kent Event: Deliveries](#) > [TeamRaiser Emails: Kent Event: Configure delivery groups](#)

Related Actions
► **Add Groups**

The list below displays the groups that are available for selection when delivering a message. Use the Add Groups related action to add groups to this list. Use the remove action to remove a previously associated group from this list.

- Group List -

Page 0 of 0

Group	Actions	Status	Group Type	Updated
There are no Delivery Groups defined for this event.				

► 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

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

Records 1 - 10 of 100+ [First](#) | [Previous](#) | [Next](#)

Add Selected Groups

► **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!



► IMPROVE SEGMENTATION

- Use the TeamRaiser task to build dynamic groups that rebuild

To Do List	Task List	Recurring Task List	Task Information
TeamRaiser Participants			
* = Required Fields			
* Names: <input type="text"/>			
* Description: <input type="text"/>			
* Security Category: <input type="text" value="General"/>			
Active? <input type="radio"/> Yes <input checked="" type="radio"/> No			
Which TeamRaisers would you like to include?			
<input type="radio"/> Any TeamRaiser			
<input checked="" type="radio"/> Any Active TeamRaiser			
<input type="radio"/> TeamRaisers Indicated Below			
<div><div>"Andrew" Test internal</div><div>"Message Cat" trick internal</div><div>00497357 - generic event</div><div>00497357 - with survey questions</div><div>010909 tenting test ~ JT</div><div>2009 Vancouver RTCC</div></div>			
Which Participation Types would you like to include?			
<input checked="" type="radio"/> Any Participation Type			
<input type="radio"/> Participation Types Indicated Below			
<div><div>1</div><div>3k Pub Crawl</div><div>5k 3-legged race</div><div>5k Runner</div><div>5k Walk</div><div>Adult</div></div>			

Limit to registrations over a specific time period?
Start with registrations this many days old (blank = from the beginning): <input type="text"/>
Include registrations up to this many days old (blank = up until now, 1 = prior to today): <input type="text"/>
Select contacts based on team membership?
<input checked="" type="checkbox"/> Include team captains.
<input checked="" type="checkbox"/> Include team members.
<input checked="" type="checkbox"/> Include individual participants.
Select contacts based on company team affiliation?
<input checked="" type="checkbox"/> Include company teams.
<input checked="" type="checkbox"/> Include teams with no company affiliation.
Select contacts based on number of donations raised?
Number of donations raised greater than or equal to: <input type="text"/>
Number of donations raised less than: <input type="text"/>
Select contacts based on dollar amount raised?
Dollars raised greater than or equal to (whole dollars): <input type="text"/>
Dollars raised less than (whole dollars): <input type="text"/>
Select financial options for donation number and amount:
<input checked="" type="checkbox"/> Include registration fees.
<input type="checkbox"/> Include secondary registration fees (only considered if "Include registration fees" is also selected).
<input type="checkbox"/> Credit recurring gifts immediately.
Select contacts based on number of e-mails sent?
Number of e-mails sent greater than or equal to: <input type="text"/>
Number of e-mails sent less than: <input type="text"/>
When should I update this group?
<input type="radio"/> Update once a day <input checked="" type="radio"/> Update once a week
<input type="button" value="Save"/> <input type="button" value="Cancel"/>

► 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.



► COACHING TEAMRAISER PARTICIPANTS

► 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

► 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  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



	A	B	C	D
1	Nation-wide Metrics			
2		2011	2012	% Change
3	Overall Revenue	\$47,002,186.70	\$51,020,004.73	8.24%
4	Total Fundraising Amount	\$38,862,966.99	\$41,242,651.93	6.10%
5	Total Participants Registered	338,872	364,333	7.45%
6	Amount Raised in Sponsorships	\$7,226,872.38	\$8,062,563.20	11.53%
7	500+	12,836	13,338	3.12%
8	% Raising \$500+	3.80%	3.65%	
9	Median Days From Event	10	11	
10				
11	Metric			
12		2011	2012	% Change
13	Overall Performance			
14	Participants Registered Online	225,734	251,125	7.38%
15	Participants Registered Offline	97,138	111,207	14.48%
16	Total Participants Registered	322,872	364,333	12.85%
17	Total Online Dollars Raised	\$18,501,805	\$21,387,844	15.59%
18	Total Offline Dollars Raised	\$20,348,392	\$21,854,808	7.40%
19	Total Fundraising Amount	\$38,862,297	\$43,242,652	11.30%
20	# of Teams	35,111	38,429	9.43%
21	# of Team Participants	275,587	303,778	10.23%
22	% of Team Participants	83.98%	83.39%	
23	Avg. Team Size	7.95	7.90	-0.62%
24	# of Participants who Fundraised	82,734	85,827	3.73%
25	% of Participants who Fundraised	45.88%	42.77%	
26	# of online Participants who Fundraised	186,75	191,40	2.46%
27	% of online Participants who Fundraised	82.74%	77.01%	
28	Total Number of Online Gifts	239,396	255,349	6.67%
29	Total Number of Offline Gifts	248,739	274,271	10.27%
30	Total Number of Gifts	588,135	589,620	0.25%
31	Avg Online Gift Amount	\$54.66	\$59.26	8.43%
32	Avg Offline Gift Amount	\$12.14	\$68.97	468.85%
33	Avg Gift Amount	\$76.30	\$71.08	-6.82%
34	Avg # of Gift-Fundraiser	3.95	3.24	-18.86%
35	Total Number of Self Donors	n/a	36,365	
36	% Making Self-Donation	n/a	26.39%	
37	For Participants Registered Online			
38	# of Online Participants who sent email	37953	37671	-0.07%
39	% of Online Participants who sent emails	16.10%	14.94%	
40	# of Online Participants who updated page	43,038	50,100	16.38%
41	% of Participants who updated page	17.09%	23.74%	
42	# of Participants returning from previous	36,823	34,762	-5.84%
43	% of Participants returning from previous	29.12%	26.47%	
44	Average raised per:			
45	Participant (total)	\$12.89	\$86.25	568.3%
46	Participant (general)	\$18.72	\$117.78	525.3%
47	Fundraiser (Avg)	\$181.31	\$202.58	11.72%
48	Fundraiser (Median)	\$50.00	\$100.00	100.00%
49	Online Fundraiser	\$26.77	\$222.98	735.4%
50	Team Captain	\$268.95	\$268.66	-0.11%
51	Team Member	\$50.66	\$50.74	0.15%
52	Individual Walker	\$45.81	\$55.80	21.81%



► 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.

► 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



► STRATEGIES IN PRACTICE

► 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	Infographic - 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?

Manage TeamRaisers

[TeamRaiser List](#)[Participants](#)[Teams](#)[Local Companies](#)[Unconfirmed Gifts](#)[Event Gifts](#)[Coaching Emails](#)[Event Managers](#)[Library](#)

TeamRaiser Emails: 2013 Walk to End Alzheimer's: Messages

Related Actions

- [Send a Message](#)

[Create a new message](#)

This is a list of the Coaching Email messages. Use Coaching Email Messages to advise the people in different event roles of their next step or to offer fundraising encouragement and incentives.

[Message List](#)[Delivery List](#)[Report List](#)

Records 1 - 10 of 22 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Message	Action	Status	Type	Tentative Schedule	Last Modified
[Template]: 2013 Walk Website Launch SYBUNT Email announcing the launch of the new website, with username, password, and auto-login links for past walkers. Audience: Some Year, but unfortunately not this. (Content is more general and can be sent to new lists and past donors as well as participants)	Edit Copy Delete Archive Preview	Draft	TeamRaiser Invitations	No Tentative Schedule	Jan 28, 2013 10:27:06 AM by Noel Beebe
[Template]: 2013 Walk Website Launch LYBUNT Email announcing the launch of the new website, with username, password, and auto-login links for past walkers. Audience: Last year, but unfortunately not this.	Edit Copy Delete Archive Preview	Draft	TeamRaiser Invitations	No Tentative Schedule	Jan 28, 2013 10:26:37 AM by Noel Beebe

► RECRUITMENT EMAILS

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

TeamRaiser

[TeamRaiser List](#)[Cross-Event Teams](#)[Registration Upsells](#)[Event Management Settings](#)[Uploads](#)[Participant Centers](#)

Uploads

Related Actions

- [Upload Registrations](#)
- [Upload Survey Responses](#)
- [Upload Gifts](#)
- [Upload Tent Assignments](#)
- [Upload List for Emailing](#)
- [Upload DSP Charges](#)
- [View Error Codes](#)

[Refresh this page](#)

This is a list of the TeamRaiser Upload operations performed on this site. To determine the number records contains errors, use its Download Errors action to open a copy of the upload file and scroll to the end of ea

- Upload List -

Records 1 - 20 of 200+ [First](#) | [Previous](#) | [Next](#)

Name	Actions	Status	Type
File uploaded on Jul 29, 2013 4:27:59 PM	Review Delete Download Errors	Complete with Errors	Registration

[Add Checked Groups](#)

► 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.

Reports

Reports Classic Report Writer Report Results

Report Results

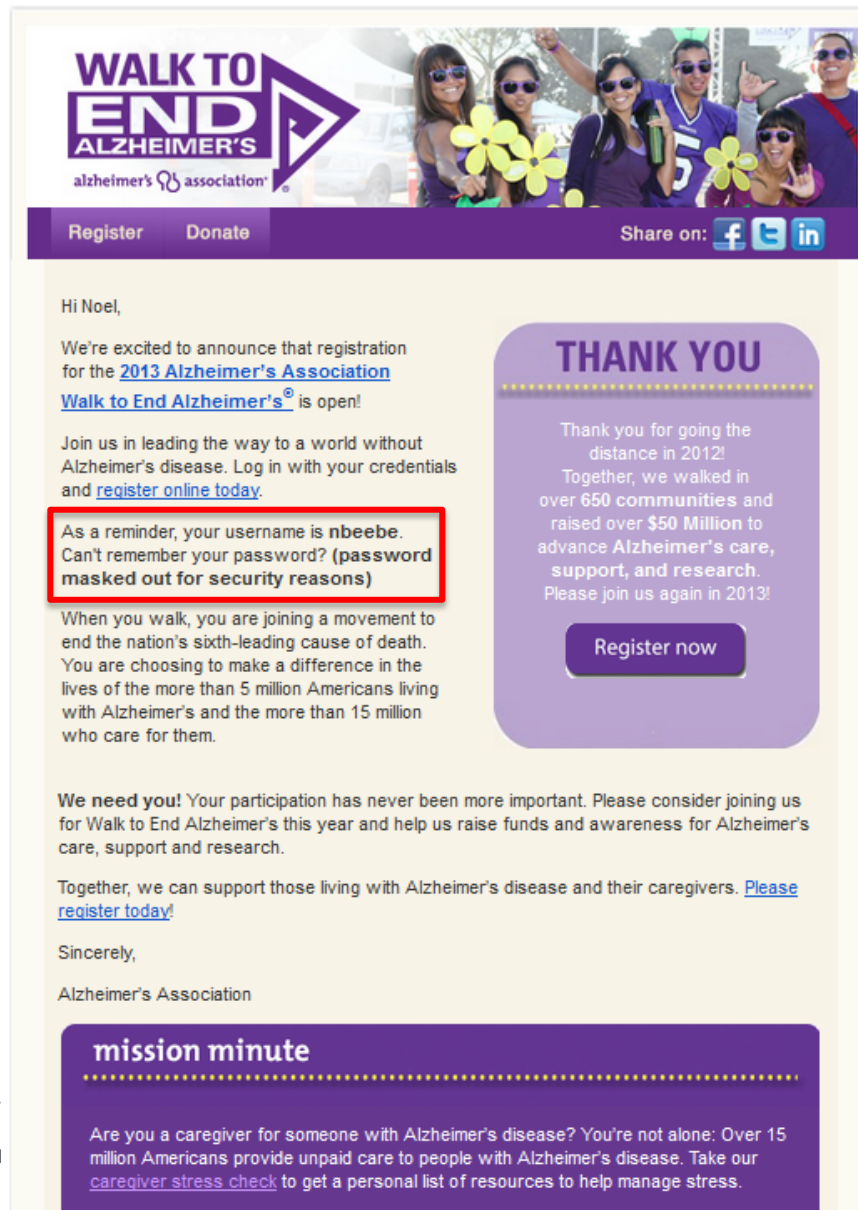
Refresh this page

Results for reports you ran in the last 200 hours. To view results for a specific report online, click its View action. To view the results as a file on your computer, click the Download action. To print the results on your local printer, click the Print action and follow the prompts.

Expand All Collapse All	Records 1 - 14 of 14 First Previous Next Last		Search	Show All	Page 1 of 1	To Page
Custom Reports	Name & Description	Actions	Status	Submitted By	Shared By	Data Current As Of
My Reports						
Aibarra Reports						
BLingard's Reports						
Central Illinois Event Reports						
Central New York Reports						
Chapter Advocacy Reports						
Constituent Events						
General Events						
National BvB Reports						
National Walk Reports						
The Longest Day						
	05 - 2013 Walk Teams Report	View Download Print Add to Group Delete Share	Completed 18242 Rows	Noel Beebe	Noel Beebe	2013/07/29 08:42
	This report shows a list of teams with total members and total dollars raised. This report can span multiple events					
	04b - 2013 Walk Donations Report	View Download Print Add to Group Delete Share	Completed 59502 Rows	Noel Beebe	Noel Beebe	2013/07/29 08:38
	This report shows a list of all donations to an event, team, and/or participant. This report can span multiple events.					

► RECRUITMENT EMAILS

- Example



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

Rule #2: All links = register!

► 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



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



► 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!



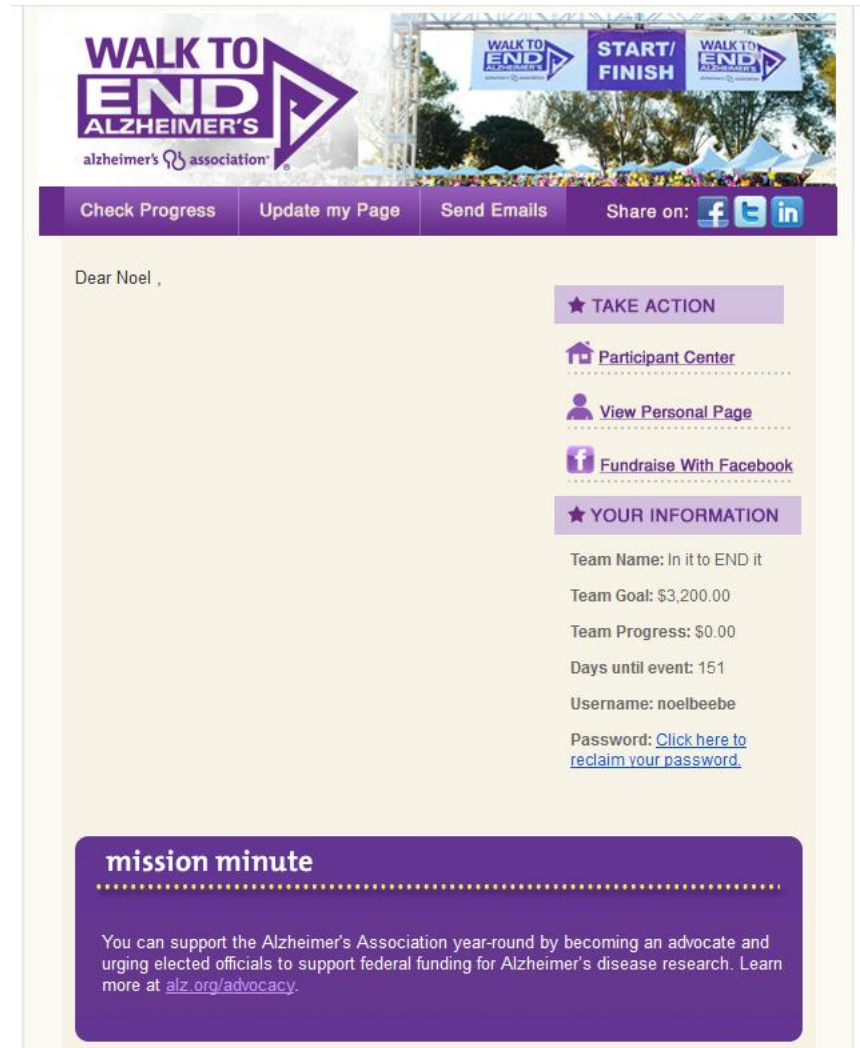
Turn in Cash and Check Donations →

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



➤ 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



BECOME A CHAMPION!

RAISE \$500 OR MORE TO JOIN THE WALK TO END ALZHEIMER'S CHAMPION'S CLUB



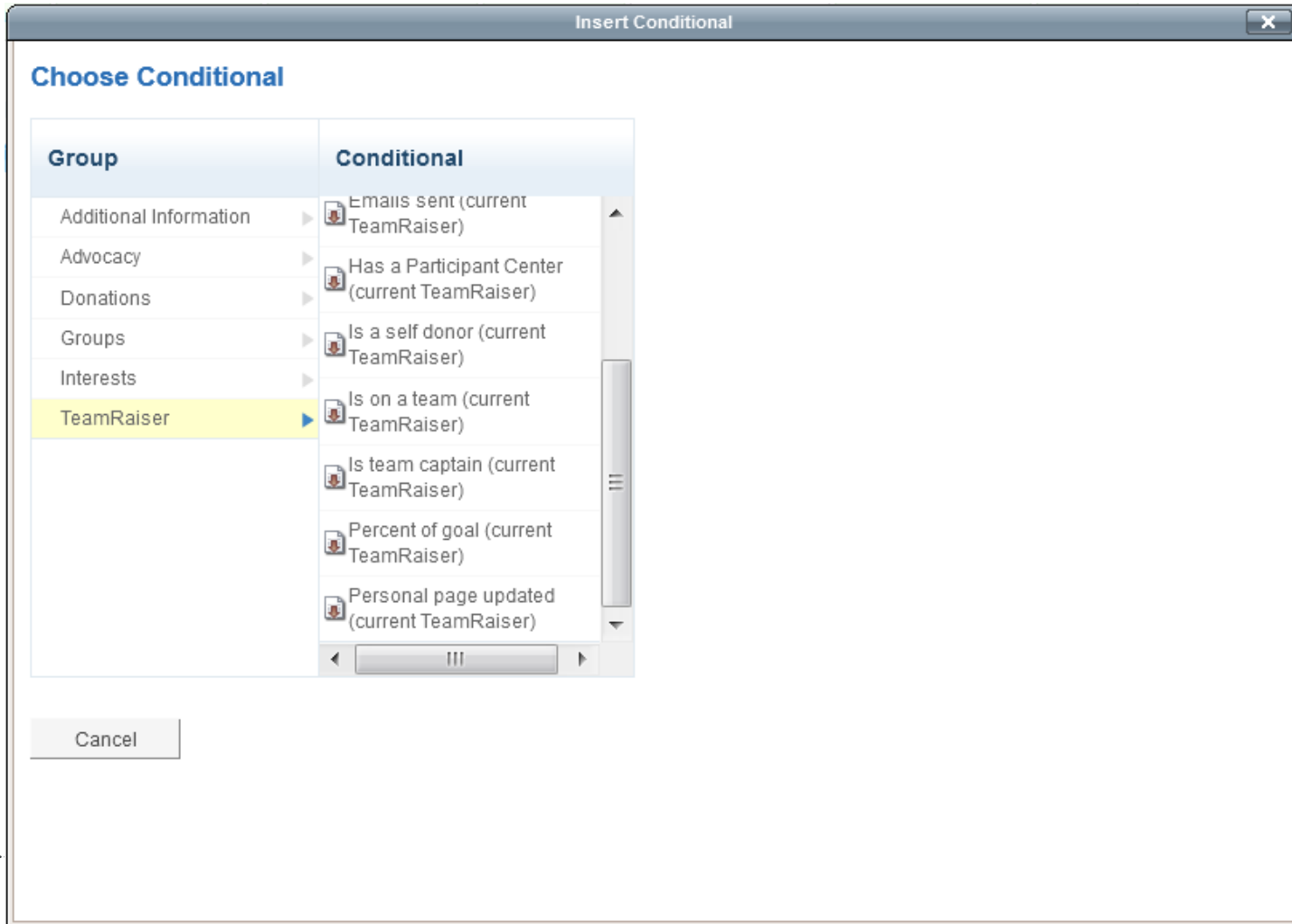
► COACHING EMAIL PLAN

	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

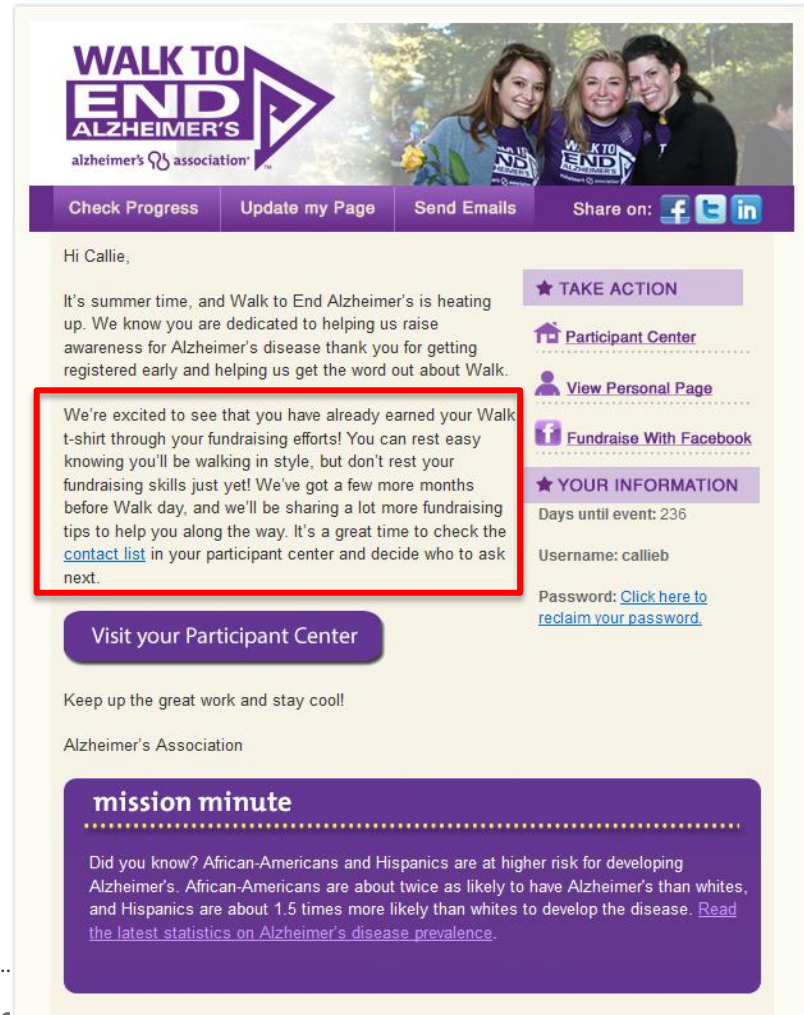
► COACHING EMAILS

- Why use Coaching Emails?



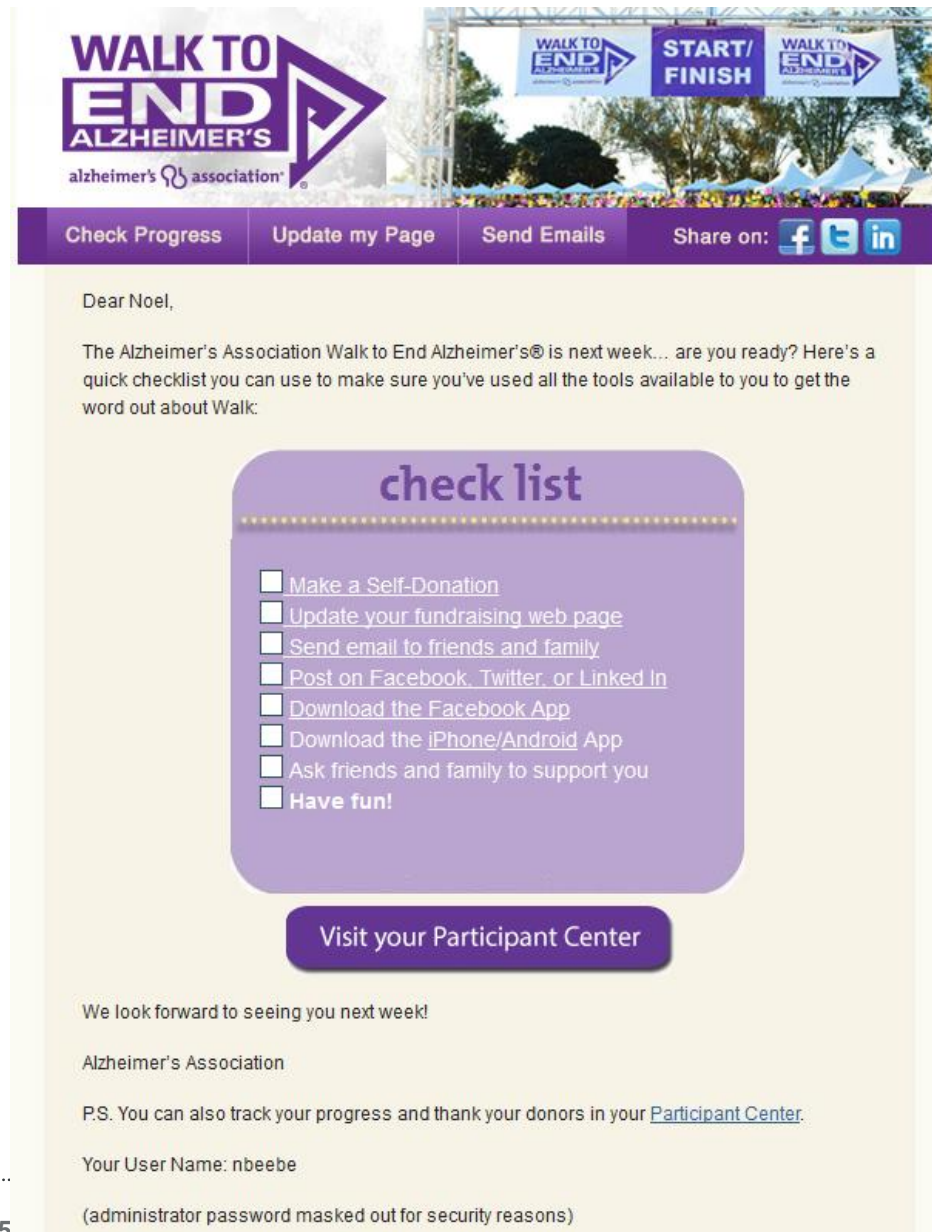
► COACHING EMAILS

- 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



The screenshot shows a coaching email from the Alzheimer's Association. At the top, there is a banner with the "WALK TO END ALZHEIMER'S" logo and a photo of a walk event. Below the banner is a navigation bar with links: "Check Progress", "Update my Page", "Send Emails", and "Share on:" followed by social media icons for Facebook, Twitter, and LinkedIn. The main body of the email starts with "Dear Noel," and a paragraph stating: "The Alzheimer's Association Walk to End Alzheimer's® is next week... are you ready? Here's a quick checklist you can use to make sure you've used all the tools available to you to get the word out about Walk:". Below this is a purple box titled "check list" containing a checklist of tasks: "Make a Self-Donation", "Update your fundraising web page", "Send email to friends and family", "Post on Facebook, Twitter, or Linked In", "Download the Facebook App", "Download the iPhone/Android App", "Ask friends and family to support you", and "Have fun!". Below the checklist is a purple button that says "Visit your Participant Center". The email concludes with "We look forward to seeing you next week!", "Alzheimer's Association", "P.S. You can also track your progress and thank your donors in your [Participant Center](#).", "Your User Name: nbeebe", and "(administrator password masked out for security reasons)".

WALK TO END ALZHEIMER'S
alzheimer's association®

Check Progress Update my Page Send Emails Share on: f t in

Dear Noel,

The Alzheimer's Association Walk to End Alzheimer's® is next week... are you ready? Here's a quick checklist you can use to make sure you've used all the tools available to you to get the word out about Walk:

check list

- ☐ [Make a Self-Donation](#)
- ☐ [Update your fundraising web page](#)
- ☐ [Send email to friends and family](#)
- ☐ [Post on Facebook, Twitter, or Linked In](#)
- ☐ [Download the Facebook App](#)
- ☐ [Download the iPhone/Android App](#)
- ☐ [Ask friends and family to support you](#)
- ☐ **Have fun!**

Visit your Participant Center

We look forward to seeing you next week!

Alzheimer's Association

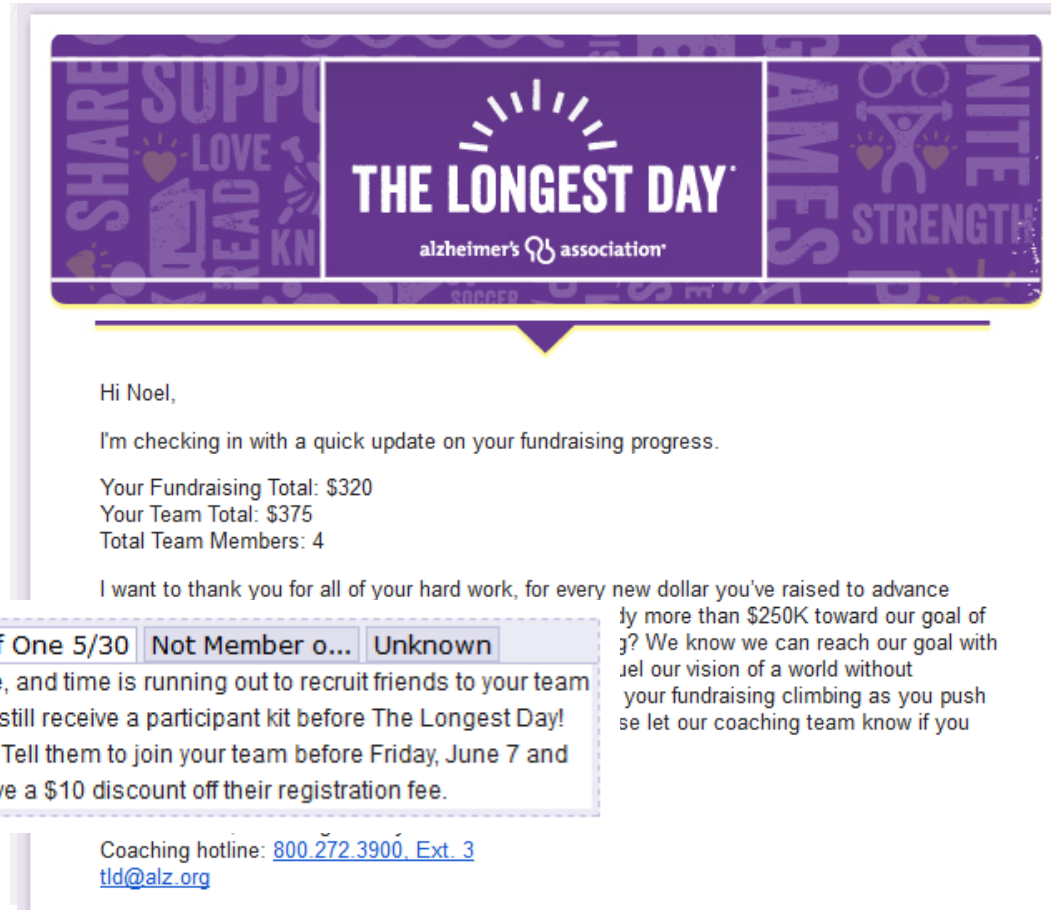
P.S. You can also track your progress and thank your donors in your [Participant Center](#).

Your User Name: nbeebe

(administrator password masked out for security reasons)

► TEAM CAPTAIN COACHING

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



The screenshot shows an email header with a purple banner for "THE LONGEST DAY" by the Alzheimer's Association. The banner includes icons for "SHARE", "SUPPORT", "LOVE", "READ", "KNOW", "GAMES", "UNITE", and "STRENGTH". The email body starts with "Hi Noel," followed by a fundraising update. It lists: "Your Fundraising Total: \$320", "Your Team Total: \$375", and "Total Team Members: 4". A paragraph of text follows, partially obscured by a table. The table has three columns: "if", "Member of Group: TLD Team of One 5/30", "Not Member o...", and "Unknown". Below the table, the text continues: "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." At the bottom, it provides a coaching hotline: "800.272.3900 Ext. 3" and an email: "tld@alz.org".

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

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

ty more than \$250K toward our goal of
g? We know we can reach our goal with
del our vision of a world without
your fundraising climbing as you push
se let our coaching team know if you

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](tel:8002723900) Ext. 3
tld@alz.org

► MILESTONES

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



- 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

THANK YOU ALL FOR COMING!

blackbaudTM
your passion > our purpose