

## **Donor-Message Matching: Increasing Response Through Offer Optimization**

### *Session Outline*

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#### **SESSION OVERVIEW**

- **Introduction:** 3-5 minutes
- **Data Requirements:** 15 minutes
  - Amy Barriale, Membership & Production Manager, African Wildlife Foundation
- **Strategy Development:** 15 minutes
  - John Graves, Vice President, Eidolon Communications
- **Creative Techniques:** 15 Minutes
  - Rebecca Shapalis, Client Services Manager, Production Solutions
- **Final Thoughts and Q&A:** 5-10 minutes

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#### **PART I: INTRODUCTION**

1. A 'one-size-fits-all' solution may work for some things, but not in the case of donor messaging.
2. By creating more customized donor tracks that incorporate individuals' preference data, highly personalized correspondences can then be tailored to increase response rates and drive loyalty.
3. The process of establishing variable tracks into your donor message:
  - a. **Step 1** – Who is your donor?
  - b. **Step 2** – Prepare your data.
  - c. **Step 4** – Set the stage
  - d. **Step 3** – Establish campaign messages
  - e. **Step 5** – Synchronize with other channels.
  - f. **Step 6** – Tweak & Retool

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#### **PART II: DATA REQUIREMENTS**

1. **Step 1 – Who is your donor?**
  - a. The data behind the customization is one of the most important factors in this equation
  - b. In order to create truly personalized communications, you need to know:
    - i. Who your donors are
    - ii. What are the fundamental influencers that encouraged them to join
    - iii. What are the drivers to remain loyal
  - c. This needs to be based on data and facts as opposed to assumptions
2. **Step 2 – Prepare your data.**
  - a. Database structure should support:
    - i. General contact information and giving history
    - ii. Key influencing information
    - iii. Organizational interest areas/preferences
  - b. Need to consider the following:

- i. What are the key data points for the organization?
- ii. How can organizational interest preferences be codify and simplified?
- iii. By what means data be collected for the necessary segmentation?
- iv. How can data collection process be automated for ease of use and scalability?

### 3. Case Study: AWF's Database Migration

- a. Overview of AWF wide range of program work
- b. Legacy Organizational Data Issues
  - i. Discrepancies with database: online versus offline
  - ii. Inconsistencies with donor flagging and communication preferences
  - iii. No process for collecting or tracking data on donors/interests
- c. Solution Identification and Implementation
  - i. Database restructure
  - ii. Create standard coding and attributes for consistency across entire organization
  - iii. Online portal for individual management of communication and interest preferences
- d. Future Goals
  - i. Improved data keying solutions from caging and cashiering partner to upgrade to automated entry capabilities
  - ii. Ongoing data collection now that database can support additional information
    - 1. Data appends
    - 2. Offline and Online surveys
    - 3. Data collection from social media
  - iii. Creation of more tailored donor tracks based on interest preference and engagement history with the organization

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## PART III: STRATEGY DEVELOPMENT

### 1. Step 3 – Set the stage

- a. Contemplate questions to ask supporters that will assist in tailoring campaign message
- b. Identify additional means for data collection and donor engagement
- c. Be careful to not over-share the depth of data (or appearance of that) to prevent unnerving supporters

### 2. Step 4 – Establish campaign messages

- a. Establish strong connections or missions to build a fundraising strategy
- b. Consider what parts of the campaign will be best suited for the flexibility of personalization to maximize the impact and investment

### 3. Case Study: Eidolon Client #1

- a. **Topic:**
  - i. Varied messaging based on donor preferences and lifestyle
- b. **Challenge:**
  - i. Initially, organization communicated with all supporters share the same lifestyle choices, which led to potentially alienating certain groups with a lack of more tailored messaging.
- c. **Strategy Revision and Execution**
- d. **Outcome/Results Review**

### 4. Case Study: Eidolon Client #2

- a. **Topic**
  - i. Utilizing varied messaging to increase donor support in underfunded programs
- b. **Challenge**
  - i. How to engage donors in other areas of relief fundraising based on their previous interests in similar arenas.
- c. **Strategy Revision and Execution**
- d. **Outcome/Results Review**

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## **PART 4: CREATIVE TECHNIQUES**

- 1. Step 5 – Synchronize Across Channels**
  - a. Email, Web, Social.
  - b. Sync your message across multiple channels to convert supporters and increase retention
    - i. Studies have proven is the most lucrative donor
- 2. Step 6 – Tweak & Retool**
  - a. Not every message will inspire donors the way it was initially planned
  - b. This is why it's important to test and re-test. Little tweaks can make a big difference
- 3. Case Study: Basic Difficulty Level Examples**
  - a. 2-3 creative techniques that are easily executed by the majority of organizations
  - b. Statistics, results and lessons learned
- 4. Case Study: Medium Difficulty Level Examples**
  - a. 2-3 creative techniques that require more sophisticated data and production investment
  - b. Statistics, results and lessons learned
- 5. Case Study: Advanced Difficulty Level Examples**
  - a. 2-3 creative techniques that require a high level of data and programming
  - b. Statistics, results and lessons learned

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## **FINAL THOUGHTS AND Q&A**

- 1. Final Thoughts**
  - a. Data**
    - i. Resource allocation – Ensure the bones of your database structure can support your program both today and in the future
    - ii. Be mindful of how much is too much with personalization and data sharing
    - iii. Identify the key interest groups of your donor base through data
  - b. Strategy**
    - i. Understand the facts of who comprises the house file – No gut feelings!
    - ii. Have the conversation – engage in a dialog early on to develop a better rapport
    - iii. Be willing to take a risk
  - c. Production**
    - i. Be patient and plan for the expected (and unexpected) hindrances that will surely come with executing a new program
    - ii. Cost is always a concern with a more complex program. Partner with vendors to ensure financial resources are being invested to the greatest potential
    - iii. Every organization is unique. Tests are needed to determine if the ROI (both financially and staffing resources) justifies the maintenance of such a program