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QUINTESSENTIAL NONPROFIT SUCCESS KIT

Mastering the 4 Core Activities of a Savvy Nonprofit

THIS KIT INCLUDES:

- *Using the Internet to Raise Funds and Build Donor Relationships*
- *Nonprofit Website Fundamentals*
- *Basics of Email Marketing for Nonprofits*
- *Moves Management Made Easy*

ABOUT THIS KIT

No matter how big, small or established your organization, chances are you're working on a big project for your mission. Whether you're starting from ground zero or building on what you've already got, the stakes are always high. Building successful connections with your supporter base depends on effective planning, strategy, and execution in four key activities: ***online fundraising, website development, email marketing, and moves management***.

Convio has your bases covered with everything you need to get savvy, find new direction or give your team a boost on your current projects. In this complimentary Quintessential Nonprofit Success Kit, we've combined four indispensable strategy guides:

1	***Using the Internet to Raise Funds and Build Donor Relationships*** – A step-by-step guide for developing online fundraising programs that get results. READ NOW »
2	***Nonprofit Website Fundamentals*** – Learn how to build, evaluate, or tune up your website so it's truly working for your mission. READ NOW »
3	***Basics of Email Marketing for Nonprofits*** – Learn the basics of nonprofit email marketing, and how to reach out to large volumes of both new and long-time supporters with regular, timely and inspiring information tailored to each person's interests. READ NOW »
4	***Moves Management Made Easy*** – Sync up with your major donors: learn how you can use technology to easily track relationships to measure inclination and readiness, cultivate major gifts, and more effectively engage potential major donors. READ NOW »

Using the strategies in this kit, you'll learn the secret to dreaming big while keeping your tasks manageable, so you can start now. Discover the essential how-to's, best practices, quick tips, helpful research, and supporting data you need to build your case, plan, and execute your most important initiatives.

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USING THE INTERNET TO RAISE FUNDS AND BUILD DONOR RELATIONSHIPS

Tools, Tips And Techniques For Boosting Donations

THIS KIT INCLUDES:

- *Key benchmarking metrics for measuring your organization's online success*
- *Real examples of effective fundraising campaigns from nonprofit organizations of all sizes*
- *Best practices for effective online fundraising campaigns*

ABOUT THIS GUIDE

Most nonprofit organizations understand the importance of the Internet for increasing fundraising dollars and improving donor loyalty. The Internet is an efficient channel for nonprofits to reach more people and increase support.

This guide was created by a team of experts with the experience of working on Internet projects with nonprofit organizations throughout the United States and Canada. It's designed specifically for nonprofit professionals as a handbook about the fundamentals of online fundraising. It describes how to build a file of email addresses, develop strong online relationships with supporters, and execute effective online fundraising campaigns that turn those supporters into loyal donors. This guide also covers some of the basics of email marketing — the cornerstone of any online program — as well as online trends, such as social media and peer-to-peer fundraising.

Throughout the guide, you'll notice words or phrases that appear in **bold type**. These terms are defined in the glossary at the end.

For more detailed best practices about online fundraising and marketing, refer to the "Additional Resources" section at the end of this guide, or visit www.convio.com/our-research.

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INTRODUCTION TO ONLINE FUNDRAISING

The trends simply can't be ignored: Online fundraising continues to generate positive year-over-year growth[1]. And with more people than ever — including middle and major donors — giving online, nonprofit organizations must make the Internet a core part of their fundraising strategies to survive and thrive for years to come[2].

An increasing number of online success stories prove that the Internet is an efficient and effective channel for boosting donations. And the fact that Internet software designed specifically for nonprofits is more readily available and more affordable than ever makes a strong online strategy and presence within reach for any size nonprofit. By ramping up your online fundraising efforts, you can make the following strides:

» Give your supporters more control
» Maximize your web presence
» Become more strategic with your email communications

Here are some of the advantages of online fundraising that nonprofits are recognizing:

Cost-Effectiveness

Traditionally, development professionals have relied heavily on direct mail and telemarketing for their fundraising campaigns. The relatively high cost of these methods, however, makes them impractical for the frequent communications with potential and existing donors necessary to grow relationships. Supplementing traditional fundraising methods with cost-effective email communications allows you to communicate more frequently and maintain an ongoing relationship with constituents — key for improving both online and offline fundraising results.

Timeliness

Organizations often have an urgent need for donations, or have a small window to raise funds in the wake of a current event. In these cases, there's no time to write, design, print and send a direct mail piece. The immediate nature of email communications and social media channels allow you to be nimble; you can execute fundraising campaigns and respond to timely issues in a matter of hours.

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1 *The Convio Online Marketing Nonprofit Benchmark Index™ Study*
2 *The Wired Wealthy: Using the Internet to Connect Your Middle and Major Donors*

Quick Results

With direct mail appeals, there can be a response lag time of several weeks, or even months. Email appeals, however, typically return 80 percent of total responses within 48 hours of a mailing. This allows you to evaluate the results of your fundraising campaign and quickly adjust your strategy as needed. In addition, providing donors with the option to give online allows you to receive the funds immediately and automatically, rather than waiting on the mail for a check that must be manually processed.

Insights into Donor Behavior and Giving Trends

You can track how many people open emails and click on links within emails to your website, allowing you to quickly analyze the effectiveness of your fundraising campaigns. This also gives you insight into donor behavior, giving trends, and what motivates each of your donors, so you can improve future campaigns.

List Segmentation and Targeted Appeals

Internet communications allow you to develop a complete view of constituents by encouraging them to volunteer information about their interests through online surveys and forms. You can then segment your list and target groups for communications and appeals based on their interests and history with your organization. This approach ensures that every communication is relevant and valuable to each constituent, and thus increases the likelihood that individuals will respond.

This guide covers basic concepts for taking advantage of the Internet for your fundraising programs. From building a list of email addresses and developing donor relationships online to creating effective online fundraising campaigns and measuring online success, it will help you to develop online fundraising programs that get results. It also touches on recent trends in online fundraising so that you can understand what your peers are doing to leverage the latest tools and technology.

GETTING STARTED

Building an Email Address File

The first step in executing any effective online program is to build a list of constituent email addresses. Adding new donors, volunteers, advocates, and supporters to your list is important for growing your donor base because email can and should play a key role in stewardship and donor renewal.

Consider this: By gathering constituents' email addresses, you can send email newsletters and other online communications to constituents to develop an online relationship with them, and also use online surveys to learn more about their interests and opinions so you can make an educated first appeal. This type of online relationship building would be cost- and time-prohibitive through traditional means, such as direct mail or telemarketing.

The following proven tactics will help to get your online program off the ground.

View Our Client Success
Portfolio

Let us help you create your strategy and launch successful list building and fundraising campaigns.

See how we've helped other clients:
www.convio.com/portfolio

GATHER EMAIL ADDRESSES OFFLINE

Every time you communicate with current or prospective supporters, you have the opportunity to collect email addresses. Planned interactions such as renewal appeals, membership drives, and event invitations are perfect opportunities to ask for email addresses. Simply add an email address field to all response forms. At events where you will interact with a large number of constituents, set out a newsletter sign-up sheet or offer a giveaway for attendees who drop in a card with their name and email address.

Remember, when asking constituents for email addresses offline, you should emphasize the benefits they will receive by providing this information. Remind supporters that by communicating with them online, your organization can save money and time, allowing you to more effectively serve your mission. Also emphasize the benefit of timely communication: With email communications, you are better equipped to respond to compelling events and inform them quickly of important news, developments, events and programs.

TIP:

When collecting email addresses, be sure to let people know that the organization is collecting this information and how it will be used. Always give people a chance to opt out of receiving email by providing a check box that says something like, "I'd like to receive future mailings," which they can uncheck.

GATHER EMAIL ADDRESSES ONLINE

Your website is the best source for reaching new prospects and existing constituents, and collecting their email addresses. Visitors to your website have sought you out because they are interested in your organization. This existing affinity is a powerful incentive for online visitors to provide you with the information you need to build longer-lasting relationships with them online.

Provide a "quick" online registration mechanism

Use a web-based registration form that allows site visitors to register easily and quickly. Remember that the more information you request, the less likely people will be to complete the entire form. So, think carefully about the information you want to capture, and minimize the number of required fields — name and email address should suffice. You can always ask for more information about that individual through follow-up communications so that you can build a detailed profile of your new supporter.

Give site registration prominent and clear placement

Dedicate a consistent area of your home page to promoting online registration. Place it in an eye-catching spot **above the fold** to reflect its importance. You might also use an image or graphic to draw attention to this message. Don't forget to promote registration throughout the rest of your website — you may consider including a registration link in your **page wrapper** so the message will be included on every page of your site.

Promote the benefits of online registration

Make registration compelling for your site visitors. Create special benefits for registered members, and link to a separate page explaining the perks, such as free email newsletters, or advance notification of upcoming events. Invite site visitors to register by using an action phrase such as "Register to receive updates" or "Sign up for our educational newsletter."

Move beyond your traditional donor database

At the end of the day, successful fundraising comes down to the data an organization has on existing and prospective donors and the systems in place to manage it effectively and efficiently. Most traditional donor databases are built either for major donor fundraising or for direct mail. In either case they fail miserably at tracking and accounting for multichannel behavior such as interacting with an organization via email, direct mail, social media, etc. Today's modern donor is not just giving through multiple channels; they volunteer, advocate, participate in and, for some organizations receive services, as well as champion the cause to others. To be a successful fundraiser online or offline, organization's must choose a CRM/donor management system that helps track and manage relationships in one place and get a complete view of all constituents and their activities with your organization — without the limitations and hassles of your traditional donor database or multiple spreadsheets.

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COMMON GROUND™ CRM

The Convio Common Ground CRM system was designed to help nonprofit professionals build stronger relationships with your supporters — all of your supporters, not just donors. It reaches further than traditional donor databases, making it possible for you to pull together constituent information from multiple tools, across all of your organization's departments.

DRIVE TRAFFIC TO YOUR WEBSITE

Maximize traffic to your website by including your URL in your offline communications (e.g., ads, brochures, business cards, direct mail, phone hold recordings, or voice messages). Online channels and communications, such as Facebook™ and email newsletters, should link back to your site for more information. The idea is to tell prospects and supporters about the resources available to them on your website and keep the website content current and informative so that visitors will return.

You can also use **search engine optimization** (SEO) and the free Google Grants program for **search engine marketing** (SEM). With SEM, you want to "purchase" keywords to promote visibility. Keep in mind that searchers are pre-qualified prospects; you need to compel them to visit your website and act by crafting offers that are designed to drive traffic and registrations.

CALCULATE CONVERSION OF SITE VISITORS TO REGISTERED CONSTITUENTS

To determine whether you are effectively gathering email addresses online, you must understand how well your website is motivating visitors to register. To measure effectiveness at converting website visitors to registered constituents, track the conversion rate.

Here is the calculation:

$$\frac{\textit{Number of registrations per month}}{\textit{Total number of unique site visitors per month}} = \textit{Conversion Rate (\%)}$$

For example, if 30 of every 1,000 visitors to your site register each month, the conversion rate is 3 percent. Typically, nonprofit organizations register 2 to 3 percent of all site visitors. During promotions, fundraising drives and other events, this rate may increase.

If your registration rate is low, consider these tactics:

» Ask someone unfamiliar with your organization's website to go to the home page. He or she should find the registration option within five seconds. If the registration box or link is not prominent, valuable prospects may fail to register. Consider varying the position of the registration option on the page to gauge the effect. Often, top right-hand placement yields the best conversion rate.

» Ask supporters if the incentive to register — which, for many groups, is a newsletter — would make them provide their email address.

» Include a link to your organization's privacy policy near the registration box that explains how the information will be used; this may allay fears about potential misuse of email addresses.

TIP:

Look for online fundraising software that includes tools for automatically measuring website traffic. This will reduce, and possibly eliminate the need to manually calculate Web statistics.

BUILD YOUR LIST THROUGH VIRAL MARKETING

"Tell-a-friend" email — a type of **viral marketing** — can help you reach new supporters and grow your email file efficiently. In a viral campaign, your organization sends an email with a call-to-action (such as a solicitation for donations) to your existing email file, or to selected groups of constituents in the file. The email also asks recipients to forward the message to friends, relatives and co-workers so they, too, can get involved. When a new supporter from this previously untapped network of friends clicks through to your website to register and take action, you can ask for their permission to include them in future communications.

eCards are another way to build your email address list. Constituents can create their own email greetings — using your eCard template, with your organization's branding — to send to their networks of friends and family.

CONSIDER USING LIST RENTALS OR AN EMAIL APPENDING SERVICE

To increase your email list, you can have a third-party list owner cross-promote your organization. They should do so by sending an email with their brand and a link to your website for interested parties to opt in to your email list.

If you have an extensive donor or supporter database, but few current email addresses, consider taking advantage of the growing number of **email append** services that will take a postal mail address and attempt to find a matching email address. These services will typically provide (for a fee) all email addresses from their database that don't bounce. A cautionary note: This process does not obtain permission for you to add the email addresses to your list. Even if a constituent has a relatively strong offline relationship with your organization, that does not necessarily mean they are happy to receive email from you. The safe way to use an append service is by having the service send an email driving people to your website, and obtaining an explicit opt-in from site visitors. This results in a smaller list, but one of higher quality.

Developing Online Relationships with Supporters

Most development professionals understand the value of strong constituent relationships for driving donations. However, the high-touch nature of relationship building typically makes it impractical for use with every supporter. The Internet is a fast, cost-effective channel for constituent communications, enabling you to build online relationships quickly and easily. Sending email newsletters, notifications of upcoming events, and updates on your organization's progress, as well as creating an online community, all help to keep your cause "top-of-mind" and make supporters feel more connected to your organization. This, in turn, makes them more likely to donate when you send an appeal.

Following are a few ways to begin building online relationships with your constituents.

FOCUS ON DONOR TREATMENT

The economics of direct mail fundraising, or the cost to produce and send a piece of mail, require an approach focused on solicitation; through almost every piece of direct mail they send, nonprofits must solicit a contribution to offset the cost. With this approach, however, there's little focus on treating a donor or prospect like a valued supporter because it seems as though you only contact them when you want money.

Online fundraising turns this approach around. Through email, you can communicate with donors and prospects at close to zero cost, so every acknowledgement and general update no longer has to be cost-justified. In addition, online constituent relationship management solutions make it easy to learn what is most important to donors and personalize updates and appeals according to their interests and giving history.

TIP:

Be sure your online fundraising software includes constituent relationship management functionality, making it easy to learn what is most important to donors and personalize updates and appeals according to their interests and giving history.

GIVE SUPPORTERS A VOICE

Supporters who feel they have a voice in the organization are more likely to contribute time and money. Create an ongoing conversation with constituents through online surveys, polls and petitions. In addition, create a constant narrative by regularly updating website content. Supporters will stay engaged online to see how your organization is progressing.

CREATE A SENSE OF SHARED IDENTITY

In addition to giving supporters the sense that they have a voice in your organization, it is important to make them feel part of the cause. Consider creating an **online community**, as well as online forums such as blogs, to allow constituents to voice their opinions, make suggestions, and communicate with other supporters as well as your organization's staff. The access to ideas and opinions on the site gives each supporter a sense of being part of the organization and part of a community.

Also, consider taking advantage of social media channels, such as Facebook, LinkedIn™, and Twitter™ to broaden your organization's reach by tapping into the networks of supporters. As you face increasing competition for donor dollars and supporters' time, social media can be a powerful way to keep your constituents engaged and involved.

MANAGE RELATIONSHIPS WITH ALL OF YOUR SUPPORTERS

Relationship management today requires knowing all of your contacts and supporters (not just donors), understanding their relationships with others, and coordinating those relationships into support for your cause. An increasing number of nonprofits are turning to Constituent Relationship Management (CRM) to take advantage of the customer relationship approaches that retailers like Amazon.com have used for years.

If you're still using a simple contact management system, consider looking into using a CRM system built for nonprofits. These systems are surprisingly cost-effective thanks to years of fine-tuning by industry leaders and evolving technical innovations. And, you can start reaping the following benefits of CRM relatively quickly:

» You can use it to manage relationships with everyone involved with your organization

» It connects with the other programs and applications you use on a daily basis

» It gives you a total view of your supporters so you can optimize your communications with them based on history, interests, and other factors

» It works with the technologies your constituents use to communicate: YouTube™, Twitter, Facebook, LinkedIn™, blogs, and more

LEARN MORE

For more tips on using CRM to manage your relationships with all of your supporters, refer to: ***Toolbox for the Modern Nonprofit: Donor Management Made Easy.*** See the "Additional Resources" section at the end of this guide.

ONLINE FUNDRAISING CAMPAIGNS: THE BASICS

Once you have begun to develop an online relationship with your constituents, it's time to make that first "ask." Consider the approaches in this section to ensure each email appeal and online campaign is as effective as possible.

Determining Objectives

It's critical to clearly understand the strategic objectives of your fundraising campaign before you get started. Setting objectives will help you sharpen your message and determine the best approach — from email newsletters and urgent news updates to email fundraising appeals — for your communications. It also will help you to effectively evaluate results and understand your return on investment.

For instance, your goal might be to improve awareness of your organization and acquire new donors among younger supporters aged 28-40. The campaign might include four different individual emails, executed over a 12-week period. The objective of the first communication might be to engage this demographic with an informational update on your organization's activities. The second email might be an invitation to a special event for younger supporters. And the third might include a fundraising appeal, followed by a reminder to those who have not yet donated.

Segmenting Your Email List to Target Specific Audiences

As with direct mail, you will improve response rates by segmenting your email file based on factors such as interests, donation history, gender, age, length of membership or any other defining characteristic, and then targeting supporters with specific messages. Here are a few techniques for gathering more information about your donors and prospects:

» Regularly ask registrants to volunteer information about themselves — such as their preferences for specific causes — that will enable you to send more personalized communications. Include these questions in online surveys and forms, and create printed surveys for gathering information at events.

» Conduct "profiling drives" of existing donors, offering them the opportunity to receive personalized information that matches their specific interests.

» Ask donors and prospects for ZIP code information, which you can then use to send communications about events or news relevant to their local area.

Cross-Marketing to Reach More Donors

One of the greatest benefits of creating a database of email addresses with detailed profiles of each constituent is the ability to cross-market. For example, you may know through your profiles that several supporters have previously volunteered for your organization, but have never donated. This information indicates that they already have a strong affinity for your organization. Consider sending them a targeted email to thank them for past support and re-engaging them with your organization. Then, after re-establishing that relationship, send them another email encouraging them to donate.

Building the Online Fundraising Campaign

While setting goals and targeting your audience is the beginning of an effective online fundraising campaign, you should consider other campaign building blocks as well. The following approaches will maximize your online success.

CREATE COMPELLING MESSAGES THAT GET READ (THE TRUST RULE)

Email messages are the cornerstone of any online program. To ensure that each email message gets optimal response, follow the TRUST rule. Be sure each email is:

Timely

Time email messages around some kind of current event, holiday, or something else that's happening with your organization. This approach will help grab the recipients' interest.

Relevant

By including information specific to each constituents' interests, each email communication from you will be more valuable to them.

TIP:

Choose online fundraising software that allows you to automatically customize an email message based on each recipient's interests, geographic location or other unique characteristics from your database.

Urgent

Email messages should make it clear why it's important for the recipient to act immediately. Otherwise, the message might sit for days without a response.

Specific

Make sure the reader can determine exactly what you want them to do, such as make a donation or sign up for an event, after reading your email message.

Tested

Test your email message and ensure all links work properly before you press send. In addition, run it through a **spam checker** to test for elements that might get your message caught in a spam filter. Also, test the message content for effectiveness by sending two or more messages — with a varied element in each message, such as the subject line — to a subset of your target audience. Then, send the most effective message to the remainder of the audience, without sending it again to the test group. (Your online fundraising software should allow you to do these types of tests.)

BUILD CONTEXT IN WHICH SUPPORTERS CAN PARTICIPATE

The Internet is an ideal vehicle for providing campaign context and for creating a sense of urgency. Take advantage of this by challenging supporters to participate in drives with hard deadlines and specific goals. Create the context — or use an existing context such as a breaking news event — and then give supporters the opportunity to take action and be heard within that context. For example, an animal welfare organization could create a campaign to raise funds for dog immunizations, with a stated goal to raise $30,000 within the next three months. The group could then ask its supporters to donate to that campaign, and send weekly updates to let them know how the campaign is progressing.

CREATE MULTI-PHASED EMAIL APPEALS

As with any campaign, it's important to include a series of communications to maximize response; your online fundraising campaign is no exception. It's not about a fancy design; it's about having a coherent message. Think of your fundraising campaign as having a beginning, middle, and end. For example, in the first message of a campaign, you might announce the campaign and provide details including how the funds raised will be used. A second message, sent only to those who did not respond to the first, could remind recipients about the campaign and encourage them to respond. A third message, again sent to those who did not reply to the first or second messages, might tell recipients how the campaign has progressed, and encourage them to help your organization meet its goal. Managing multiple messages and recipient groups in a campaign might seem overwhelming, but online fundraising software can make it easy. Choose software that automates the process of sending multiple campaign messages, tracks responses within the context of the campaign, and then aggregates the results.

INCLUDE DEDICATED LANDING PAGES/WEB PAGES

It's important to include a link to a landing page for each campaign so constituents can find out more details about your campaign and where they can make a donation. You can also extend your online campaign by promoting it on pages throughout your website. Consider creating a dynamic personal campaign page where existing donors are individually recognized, thanked for their most recent donation, shown the results of all of their past donations, and offered the opportunity to donate again. This special personalized touch helps you to acknowledge past donors and make them feel appreciated.

TIP:

When choosing online fundraising software, be sure it allows you to set up a personal campaign page so that it automatically recognizes existing donors and inserts the appropriate information onto each of their individual pages.

OFFER CONVENIENT, SECURE ONLINE DONATION PROCESSING

Offering online donation processing can help your organization in multiple ways. Donors often prefer the convenience of making a donation online using their credit card. In addition, providing donors with the option to give online allows you to receive the funds immediately and automatically, versus waiting for a check to arrive by mail and then manually processing it. Choose online fundraising software that offers secure donation processing capabilities, including configurable online donation forms so you can choose exactly what donation options you will offer to individuals.

CUSTOMIZE GIVING LEVEL OPTIONS

Include several giving options so that donors/members can make the donation at the level they desire. Your fundraising software should allow you to customize an online donation form based on a donor's giving history. For example, if a donor gave $100 one month, the next time he visited the site, he would see giving options for $100 and more. These tailored giving levels should encourage increasingly larger gifts. You should also offer sustainer giving options that allow repeat donors to set up regular online payments. Sustainer giving creates a stronger level of attachment to your organization, with benefits, premiums, or membership privileges. It also provides your organization with steady cash-flow. From an organizational perspective, sustainer giving reinforces your brand and mission, smoothes income over the course of the year, and makes you less reliant on one-time year-end appeals when the economy is soft and donor giving has been impacted.

TIP:

Be sure to choose online fundraising software that enables you to offer convenient, secure online donation processing, including sustainer giving options that allow repeat donors who support any ongoing cause to set up regular online payments billed directly to their credit card.

GIVE ONGOING FEEDBACK

While most fundraising professionals ensure that every donor gets a thank you message of some kind, they don't always keep the constituent informed about what the organization did with the donation. Constituents can feel disconnected with an organization when they make a donation, and then never hear about the impact of the donation.

To keep donors involved, always give feedback about how their donation was used — tell them how it made a difference. If they make a donation to a specific campaign, for example, send them an email update on a regular schedule to let them know how close the organization is to meeting its goal for that campaign. Then, send them another update to let them know how the organization used the funds. With these simple acts, donors will never feel as if their donations were meaningless because they will always know the results of their gifts. As a result, they'll be more likely to give again when they receive your next fundraising appeal.

TAPPING YOUR CONSTITUENTS FOR VOLUNTEER FUNDRAISING

Your supporters are your organization's greatest asset. They share passion for and commitment to your organization's mission. What if you could channel that passion and commitment by turning your constituents into volunteer fundraisers for your organization? Using the right Internet software and strategies, you can.

Raising Funds Through Run/Walk/Ride Events

Many organizations have discovered the effectiveness and efficiency of tapping their constituents for fundraising events such as walks, runs, and rides. This peer-to-peer fundraising approach allows you to not only raise funds through participant registration fees, but also provide participants with the motivation and online tools to contact the people they know for contributions, who in turn can reach out to the people they know, and on and on for a continuously growing support base. By becoming directly involved with your organization, supporters feel a sense of responsibility for your organization's success.

Following are the basics for a successful online program for run/walk/ride volunteer fundraising:

CHOOSE THE LATEST ONLINE TOOLS FOR WALK/RUN FUNDRAISING

To create and maintain an effective volunteer-based fundraising program through run/walk/ride events, it's important that you first select online tools that help you and your volunteers (including event participants, team captains and corporations) manage effective campaigns via the Internet. Consider the following online software capabilities before choosing your Internet tools:

Tools for participants to create personal fundraising Web pages and send donation appeals via email to their networks of family and friends

Be sure your online software allows individuals or teams to create and maintain their own websites, manage email communications with friends and family regarding their event participation, and easily measure and display progress according to their fundraising goals. They should be able to include photos, links and progress reports on their sites, and online donation processing should be fast and secure.

TIP:

Your special event fundraising software should include executive summary reports to give you insight into your run/walk/ride event participants and volunteer fundraisers.

Increasing donations by leveraging corporations

Choose online software that allows you to set up special administrative access for a designated coordinator at each of your participating companies. You should be able to easily send updates and motivational communications to all company coordinators, their team captains and team participants. The coordinator also should be able to use your online software to easily email updates, reminders, motivational messages and other communications to all team captains and participants within his or her company, encouraging them to tap their networks of friends and family to support your cause. The benefit: Instead of having several teams at the same company raising funds without overall coordination, the company can create a "super team" with a single point of contact between the company and your organization.

MOBILIZE RUN/WALK/RIDE PARTICIPANTS AS VOLUNTEER FUNDRAISERS

With online fundraising software in place, you need to get your participants motivated as volunteer fundraisers. The more engaged they are with your program, the more funds they will help you raise.

There are several ways for your organization to increase participation and fundraising results for your event:

Recruit people who have participated before

Participants from past events are the lowest hanging fruit when it comes to recruiting for an event.

Ask supporters to become participants

Activists, donors and volunteers have an existing affiliation with your organization. Because of this connection, these individuals are more likely to take part than a person who has never been involved with your organization in the past. Reach out to them and ask them to participate!

Motivate and encourage your volunteer fundraisers

Send regular emails to keep volunteer fundraisers motivated. Consider sending special messages to those who are close to their goals; and to those who are not. Also, send emails to volunteer fundraisers at intervals — such as four weeks out, three weeks out, and two weeks out — to keep them engaged. Include motivational stories to remind them of how their work is helping the organization, and highlight techniques that people are using to reach their fundraising goals.

Provide an email template to individual fundraisers

Craft a standard email message that can be equally effective as-is or if used as a foundation for a customized email.

TIP:

When choosing special event fundraising software, be sure that it allows you to set up emails to send automatically at specific times, such as two weeks prior to the event, to keep your volunteer fundraisers motivated to reach their fundraising goals.

SHARE BEST PRACTICES WITH VOLUNTEER FUNDRAISERS

You can position your individual fundraisers to reach their goals by sharing best practices of successful individual fundraisers. For example:

Start early

The earlier you get your team leaders and individual participants started on their fundraising activities, the more time they'll have to raise funds, and the more likely they will be to meet their goals.

Develop an exhaustive list of prospective donors

Fundraisers should reach out to anyone who might donate. Individuals shouldn't limit themselves to friends and family; names from organizations or clubs (e.g., a running club, a church congregation) can also be added to the list of prospective donors.

Ask, ask, and ask again

The only way that people can make a donation is if you give them the opportunity to do so. So encourage fundraisers to get out there and ask!

Get creative

Fundraisers need to think outside of the box when it comes to encouraging people to donate. Suggest that they give people a jar and ask them to save their change for a month; or hold a raffle or an auction to boost donations.

LEARN MORE

For more tips on raising funds through run/walk/ride events, refer to: ***A Race Against the Clock: How to Maximize the Fundraising Success of Your Event Participants.*** See the "Additional Resources" section at the end of this guide.

Driving a New Source of Funds Through Personal Fundraising Websites

Peer-to-peer fundraising for your walks, runs, and rides is just the beginning of this unique and effective approach to boosting donations. The same approach can be used throughout the year to further tap your constituents to raise funds and drive support. Specifically, you can use personal fundraising websites, which give constituents online tools to set up websites in memory or in honor of a friend or family member.

Through a personal fundraising website, a supporter can tell his or her story about a friend or loved one, send emails to friends and family asking them to visit the site, and solicit donations on behalf of your organization. These activities help your organization raise much-needed funds, reach new supporters, and put a personal face on your organization's mission.

Some examples of personal fundraising sites include the following:

» A site supporting breast cancer research for a loved one who is suffering from or has passed away from breast cancer

» A site honoring a community teacher, with donations going to a local reading program

» A site created by a homeless shelter volunteer, describing how he's been touched by his work, and encouraging friends and family to make donations to the organization

» A site in tribute to a grandmother whose lifelong passion was promoting animal welfare, with donations from the site going to a humane organization

Try the following techniques to create and optimize a personal fundraising program for your organization:

GIVE CONSTITUENTS CONVENIENT TOOLS FOR PERSONAL FUNDRAISING SITES AND EMAILS

Drive new sources of sustainable funding by empowering your constituents with a convenient way to support your organization. For example, offer constituents the option to create a personal fundraising site so they can ask for donations in lieu of flowers for a funeral. Visitors and those invited to the site can make donations directly to the organization as a tribute to the person being memorialized. Be sure to choose online software that allows your constituents to easily set up their sites and send emails to friends and family throughout the year.

TIP:

Be considerate of constituents who may have just suffered a loss. Use more sensitive wording in communications with constituents who have set up memorial sites compared with those who have set up sites honoring a living person or pet.

GIVE CONSTITUENTS SUGGESTED BEST PRACTICES

Communicate with supporters who have set up personal fundraising sites. Encourage them to keep their sites updated with fundraising progress reports and recent personal stories. Suggest that they send solicitation emails on the honoree's birthday, anniversary or other occasion, such as Mother's Day or Father's Day, to keep their sites active.

CONVEY YOUR MISSION THROUGH A LIST OF PERSONAL STORIES

In addition to being an effective fundraising vehicle, personal fundraising sites can be one of the best ways to communicate your mission. A list of many sites with corresponding personal stories conveys a powerful message. For example, an anti-drug organization might have 50 constituent-created memorial sites around victims of drug-related violence, helping the organization further its message and make its concerns more personal and compelling. Launch your personal fundraising program by having a small group of your top supporters establish personal fundraising sites that you can promote on your organization's website.

CONSIDER ADDITIONAL BENEFITS OF PERSONAL FUNDRAISING SITES

In addition to helping your organization raise more money, personal fundraising sites also give your supporters a way to communicate how your organization's mission has touched them. These sites can help your supporters become more involved and dedicated to ensuring your organization's ongoing success. At the same time personal fundraising sites can expand your organization's reach to new people — your supporters' friends and family — who are more likely to donate and become involved with your organization in other ways because the appeal comes from someone they know and trust.

ORGANIZING FOR SUCCESS

According to a study conducted by Convio, most nonprofit managers feel their organization is continually strapped for resources. The study uncovered three related themes:

» Having the right people on staff is just as important as having more people.

» Whether you use a centralized, decentralized or hybrid organizational model, you need to realize that organizational structure is important and will impact the performance of your online initiatives.

» Not having an Internet plan is a recipe for failure. You need to have a plan and stick with it.

With these themes in mind, assess the diversity and quality of your in-house skills. How ready are you to take your online efforts to the next level? Armed with your assessment, you can identify key gaps that you need to fill so that you are organized for success. Consider outsourcing these pieces until your staff is trained properly to handle these tasks themselves.

Case in Point: Hope & Heroes Children's Cancer Fund

Hope & Heroes Children's Cancer Fund took this methodical approach when the organization was eager to share compelling stories online, but had limited staff to support its plans. Guided by a team of Convio online experts, Hope & Heroes learned how to use the Convio online marketing tools and how to achieve a set of clearly defined goals tied to their online success.

With the Convio Go! program, the two-person Hope & Heroes team received coaching on the development of communication templates, donation and registration forms, and best practices related to technology and marketing. This comprehensive introduction to online communications and fundraising methods provided the ideal foundation upon which Hope & Heroes began to build an integrated marketing communications strategy. Despite its limited staff, the organization hit the ground running and sent its first relationship pathway email within a month of joining Convio Go!. In the four months that followed, the organization launched a Personal Events campaign, Personal Fundraising, and an integrated (online/offline) end-of-year campaign with results that were three times higher than the year prior.

LEARN MORE

For more tips on optimizing your organization for online success, refer to: ***The Secret of Online Success: Why Structure Matters.*** See the "Additional Resources" section at the end of this guide.

MEASURING ONLINE FUNDRAISING SUCCESS

Online donations are one metric you can use to measure the success of an online fundraising program. Several other metrics can also help you to determine each online campaign's effectiveness.

Key Metrics

Any time you run a campaign, it is critical to define your goals and track metrics to determine the success of your campaign. Here are three example objectives with corresponding key metrics, benchmark numbers, and best practices that you should consider when planning campaigns, evaluating results and determining success:

IMPROVING OUTREACH

Building a base of future supporters by growing your email address file should be a key component of your online plan. The following metrics will help you track your results in improving outreach:

Website traffic growth

Increasing the number of people visiting your website is important because it helps to ensure you are increasing your organization's exposure to potential future donors. This metric is typically measured on a monthly basis so that you can easily see the impact of specific campaigns on website traffic, month-over-month.

Percentage of website visitors who register (also known as conversion rate or registration rate)

While getting people to visit your site is important, equally important is getting them to register by voluntarily giving you their email address so that you can begin an online relationship with them. This metric gives you a better idea of how effective your website is at grabbing site visitors' attention. A typical conversion rate for organizations is 2 to 3 percent.

Email address file growth

A growing number of names in your email address file is critical to online fundraising success because you need to expand your pool of prospective donors in order to increase overall online dollars raised.

To maximize results for each of these metrics, try these techniques:

» Draw members, constituents and new visitors to your website and focus on site traffic growth by promoting the site at offline events, adding frequent content updates, and making the site a valuable resource.

» Convert website visitors into registered constituents by using a prominently displayed registration field and clearly stated registration benefits. Offer members and other supporters a reason to sign up to receive emails and return frequently to your website.

» Integrate online and offline programs, events, and campaigns to draw more people online.

» Use urgent appeals that motivate constituents to forward web pages and messages to family and friends. Also consider offering incentives and online "gifts" such as email greeting cards that registered site visitors can send to friends and family.

BUILDING RELATIONSHIPS

Get to know your existing and prospective donors by building a profile of their interests and online interactions with your organization. Use this information to create regular targeted communications that will help you develop a loyal online relationship which could, in turn, lead to ongoing support.

Consider these metrics when tracking results in relationship building:

Percentage of email file providing a detailed personal profile

Detailed profiles about constituent interests, geography and other demographics allow you to segment your list and target constituents with information that interests them most. The greater percentage of people who provide you with details about themselves, the more effective you will likely be in developing relationships and turning constituents into donors. To develop individual profiles, determine the four or five pieces of information relevant to your organization for more targeted communications, and then begin to gather that information.

Email open rate

This metric shows how well you're getting through to your constituency and how engaged they have become. Open rate tells you what percent of the total recipients of your message actually opened it. A good open rate is 20 percent or more.

TIP:

Be sure to choose online fundraising software that allows you to track multiple metrics, including open rates, click-through rates, and response rates.

Email click-through rate

This metric is the percentage of your total email recipients who clicked on a link within your message — such as a donation form, petition, survey or other link. This metric shows how effective your email communication was at driving action from recipients. For regular email communications, a good click-through rate is 4 to 6 percent, however, organizations may see as high as 10 percent for targeted, personalized communications. A 2 to 3 percent click-through rate on fundraising appeals typically is good.

Response rates to surveys and polls

Surveys and polls enable constituents to provide their feedback and further information about themselves. Measuring the percentage of recipients who complete surveys is a way to understand how many are open to a deeper relationship with your organization. A 1 to 2 percent response rate typically is good.

Opt-out rates on emails
This metric is a measurement of the number of people who unsubscribe to your emails each time you send a communication to your email file. It is important to minimize the opt-out rate to maintain a list of interested and engaged constituents, and to avoid getting labeled as a spammer, or someone who repeatedly sends unsolicited emails. Your opt-out rate should be at 0.1 to 0.2 percent.

The following approaches can help you maximize your results for these metrics:

» Ask constituents to indicate their interests, and then offer relevant, personalized content both in email communications and on web pages.

» Build detailed profiles of constituents over time using surveys and polls, rather than asking for a lot of information up front when they register.

» Integrate between functions within your organization — such as development and advocacy — to build a richer, deeper understanding of each constituent.

» Engage constituents online with surveys, stories, photos, and online communities to keep them interested in your organization.

» Use email marketing best practices, such as sending emails at an optimal frequency, to minimize the number of people who opt out of receiving communications from your organization.

DRIVING ACTION

The key objective for most online fundraising campaigns is to motivate constituents to respond by making a donation, becoming a member, or purchasing a ticket for an event. In addition to overall funds raised online, the following metrics can help you gauge success in driving action:

Response rates to email solicitations for donations
Look at the percentage of people who responded, rather than the total number who received the solicitation email. This metric is a measure that will help you to determine the effectiveness of each individual email message, as well as overall campaign effectiveness. A response rate above 0.15 percent for a targeted, personalized message is very good.

Overall offline plus online funds raised
This metric helps you to determine if your campaigns are meeting or exceeding your organization's goals, and lets you monitor the overall effectiveness of multiple communication methods (e.g., direct mail, telemarketing, and email/website communications).

Number of online donors

For every fundraising campaign on your website, look at how many website visitors turn into donors by measuring the number of people who donate via the website (versus those donating in direct response to an email solicitation). This metric will help you to determine how effective your website content is at motivating visitors to make a donation.

Try these techniques to improve results for these metrics:

» Use urgent, timely calls to action with clear deadlines and purposes.

» Develop a relationship with constituents by providing them with something of value prior to asking them to take action.

» Provide constituents with multiple ways to respond, to match a variety of preferences.

» Use **micro-campaigns** — each with a specific purpose — rather than a single, broad online request for donations.

» Offer premiums — such as a certificate or bumper sticker — in exchange for online donations.

LEARN MORE

For more information about metrics and benchmarks for online fundraising, refer to ***The Convio Online Marketing Nonprofit Benchmark Index Study***. See the "Additional Resources" section at the end of this guide.

Other Online Success Factors

For any organization, the true value of the Internet is in creating and sustaining constituent relationships to ensure ongoing support. This is achieved by implementing an **online constituent relationship management** strategy to involve donors, volunteers, and other supporters in more than one activity so they can be involved with your organization in multiple ways at different times.

When evaluating the overall success of your online fundraising efforts, consider these factors, which, in some cases, are more significant to the organization than online donations:

DRIVE ONLINE AND OFFLINE GIVING

Consumers frequently conduct research online before making a purchase. However, when making the decision about where to make actual purchases, they tend to follow individual preferences based on convenience, comfort with online transactions, and other factors. Donors, like consumers, make gifts or purchases where they feel most comfortable and, for some donors, that still is through traditional methods such as direct mail or telephone. Keep in mind that your online communications and appeals will likely drive offline donations, and remember to factor that into the assessment of your online success.

INCREASE DONOR LIFETIME VALUE

The lifetime value of a donor is based upon his average gift level, gift frequency, and expected retention rate. Each of these variables depends on the quality of the organization's relationship with the donor. Effectively communicating with your donors and involving them in additional activities — such as advocacy, volunteering, and sending messages to friends — will likely help you develop closer and stronger donor relationships.

Traditional mass communications such as direct mail and telemarketing focus primarily on solicitation, but the Internet opens a world of new possibilities for donor relations because of the ease and low cost of sending constituents frequent, targeted and personalized online communications. When measuring online success, remember that online communications increase an organization's capacity to build stronger, more personalized relationships. And, that often leads to greater lifetime value of each donor.

ESTABLISH RELATIONSHIPS WITH THE NEXT GENERATION OF DONORS

It's more complicated to be a fundraiser than it was even a few years ago. The pace of change is accelerating as each new generation of donors brings a new set of habits and expectations. As you measure your online success, consider how you are communicating with Generation Y, Generation X, and Baby Boomers. This type of communication strategy is essential for stewarding donors and other supporters through their lifetime and ensuring a steady stream of support for your organization.

LEARN MORE

For more tips on charitable habits of different generations, refer to: ***The Next Generation of American Giving.*** See the "Additional Resources" section at the end of this guide.

REDUCE COMMUNICATION AND FUNDRAISING COSTS

Paper-based communications such as newsletters, member updates, and program guides are expensive. By moving many of these communications online, you can significantly reduce costs without sacrificing the frequency or quality of communications. While the Internet will never completely replace paper-based communication, in some instances — for example, urgent appeals based on a current event — email and website content are better alternatives. Plus, by using the latest online fundraising software, you can prevent information overload for your constituents (and cost overload for your organization) by only sending relevant information to your based upon preferences supporters indicate through online registration and other means.

SUPPORT MAJOR GIVING

As your donors become more comfortable giving online, your organization likely will see larger transactions over the Internet. And don't overlook the online channel as an effective mean of supporting traditional major giving efforts. The Internet has proven to be a cost-effective way for nonprofit organizations to expand their ability to communicate regularly in a personalized manner with large groups of major donors and prospects, resulting in more "marketing coverage" at a reduced overall cost.

The research from *The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors* yielded some key recommendations for dealing effectively with major donors and prospects:

» Make it a priority to use the online channel better.

» Segment lists because the best donors want different things from an organization (e.g., a business relationship versus a casual connection).

» Provide donors some control over the content and frequency of emails.

» Don't replace quality with quantity; don't communicate when you have nothing to say.

» Listen and respond to the evolving preferences of this group.

LEARN MORE

For more information about supporting major giving, refer to ***The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors.*** See the "Additional Resources" section at the end of this guide.

CONTRIBUTE IN OTHER AREAS

Donors and prospects may want to support your organization in ways other than providing financial support; this other types of support can be just as valuable as a direct financial contribution. Use email and website content to encourage supporters to volunteer, participate in advocacy campaigns, attend fundraising events, and forward your messages to friends and family.

REAL WORLD METRICS

The Convio Online Marketing Nonprofit Benchmark Index™ Study 2010

For the fourth consecutive year, Convio has created *The Convio Online Marketing Nonprofit Benchmark Index Study* to help you answer the following questions:

» What online marketing metrics should I focus on?
» How is my organization doing?
» What targets should I set for my organization?

The study looked at nearly 500 nonprofit organizations' online marketing and fundraising results and compiled a series of benchmarks for evaluating fundraising, email, advocacy, and marketing success online. The study revealed the following key findings:

Online giving grew 14 percent despite a difficult economy. Overall, 69 percent of organizations raised more in 2009 than 2008, while 31 percent saw declines in their online fundraising.

An increase in gifts drove fundraising gains. 92 percent of the organizations in this study saw an increase in the number of gifts in 2009 compared with just 43 percent of organizations seeing an increase in their average gift amount.

Donors were still giving, but giving smaller amounts. 61 percent of all organizations saw their average gift drop in 2009.

Regardless of mission, online fundraising continued to grow. The exception was Disaster & International Relief organizations, for which 2008 was a year with more significant disasters than 2009.

Small organizations grew fastest. Organizations with fewer than 10,000 email addresses on file, many of which are participants in the Convio Go! program, grew online revenue by 26 percent, and gifts by 32 percent.

Email files continued to grow strongly. The total email file grew 27 percent in 2009 to 39,100 constituents.

Web traffic growth continued for most, but at a slower rate. 60 percent of organizations grew their website traffic from 2008 to 2009. Web traffic growth in 2009 was in the single digits at 6 percent compared with double digit growth seen in previous years.

Web traffic was strongly correlated with email file growth. 38 percent of an organization's success building large email files could be directly attributed to the amount of traffic to the organization's website.

Registration rates dropped. The rate at which organizations converted website visitors to their email file declined to 2.12 percent in 2009.

Constituents were reluctant to click through. While open rates for both fundraising appeals and newsletters remained around 20 percent, the click-through rates for both types of online communication declined in 2009.

LEARN MORE

For more information about metrics and benchmarks for online fundraising, refer to ***The Convio Online Marketing Nonprofit Benchmark Index Study***. See the "Additional Resources" section at the end of this guide.

ONLINE FUNDRAISING IN ACTION: EXAMPLES FROM SUCCESSFUL NONPROFITS

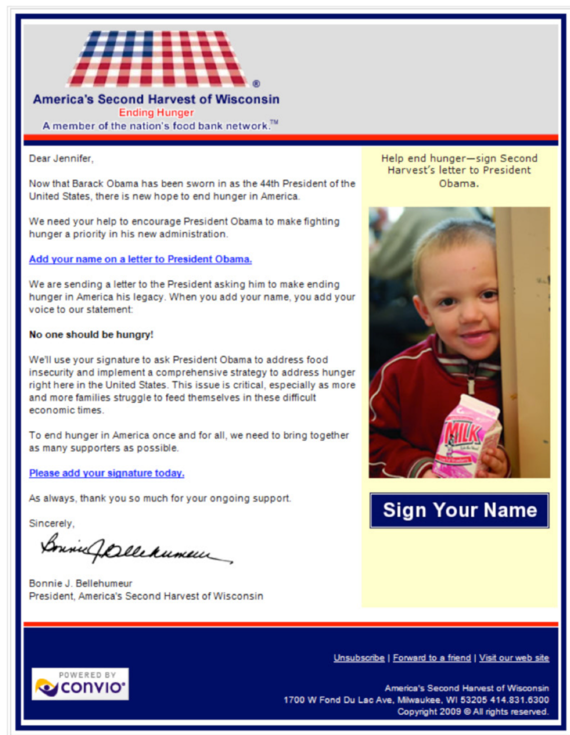
As an increasing number of organizations take their fundraising efforts online, more examples of effective campaign strategies are emerging. Here are a few examples of effective approaches from some of your peers.

Current Event Campaigns

Because the Internet allows for fast communication, it is ideal for creating campaigns around current events. By jumping into action immediately following a current event, your organization can create a fundraising campaign that grabs constituents' attention and moves them to respond.

EXAMPLE: CURRENT EVENT CAMPAIGNS

America's Second Harvest of Wisconsin (SHOW), a food bank that nourishes over 235,000 people in the eastern half of Wisconsin, leveraged current events to grow their list of email addresses and reach a wider audience with their message. They composed a letter that they distributed online on the heels of President Obama's inauguration. The letter educated the public with trends and statistics (such as "13 million children are at high risk of inadequate nutrition due to poverty"), and the embedded form allowed signers to incorporate their own personal comments on the subject of hunger in America. SHOW sent a series of emails to their list, requesting that recipients sign the letter for delivery to President Obama. To appeal to a diverse audience, SHOW varied the subject lines, text, and photos in the email series, and also reflected the cross-section of people who depend on the food bank, day in and day out. People who took action and signed the letter during the campaign received an alternate version of the follow-up email, asking them specifically to help spread the word about the campaign. While this campaign doubled SHOW's housefile, it also delivered much more. For thousands of members of the public, the contents of the campaign put a current face on hunger. It also placed hunger on their mind-map of policy priorities at a time when many issues were vying for their attention. Additionally, the significant list growth helped contribute a fresh new cohort of prospective donors that SHOW could leverage during future fundraising activities.



America's Second Harvest of Wisconsin
Ending Hunger
A member of the nation's food bank network.™

Dear Jennifer,

Now that Barack Obama has been sworn in as the 44th President of the United States, there is new hope to end hunger in America.

We need your help to encourage President Obama to make fighting hunger a priority in his new administration.

Add your name on a letter to President Obama.

We are sending a letter to the President asking him to make ending hunger in America his legacy. When you add your name, you add your voice to our statement:

No one should be hungry!

We'll use your signature to ask President Obama to address food insecurity and implement a comprehensive strategy to address hunger right here in the United States. This issue is critical, especially as more and more families struggle to feed themselves in these difficult economic times.

To end hunger in America once and for all, we need to bring together as many supporters as possible.

Please add your signature today.

As always, thank you so much for your ongoing support.

Sincerely,

Bonnie J. Bellehumeur
President, America's Second Harvest of Wisconsin

Help end hunger—sign Second Harvest's letter to President Obama.

Sign Your Name

Unsubscribe | Forward to a friend | Visit our web site

POWERED BY convio

America's Second Harvest of Wisconsin
1700 W Fond Du Lac Ave, Milwaukee, WI 53205 414.831.6300
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Invitation to Sign Letter to President Obama

eCards

eCards are a powerful communication tool that can help leverage one of your greatest assets — your existing supporters. With eCards, you offer online greeting cards on your website so constituents can send them to friends and relatives. Because people send eCards to others with whom they already have a personal relationship, recipients are more likely to open these communications and read the content, which may include a fundraising appeal.

While eCards help increase awareness about an organization, they also can be used to:

Build an organization's email file
An organization can include a message that encourages card recipients to visit the organization's website and sign up for an email newsletter or other online communication. Compelling content, including an attention-getting graphic, helps drive response. Convio clients often use this type of eCard as a simple way to add new constituents to their email files.

Get people to donate to a timely campaign or in the wake of current events
A nonprofit can use eCards to quickly send a high-impact message. For example, a relief organization could include a photograph of flood victims with information about the extent of damage the people have suffered. This kind of communication can motivate people to donate, volunteer, or become involved in a timely cause.

Expand a campaign's reach
eCards can increase the effectiveness of almost any campaign. For example, an organization promoting a membership drive through email, direct mail and telemarketing could add a series of membership eCards to its website, encouraging existing members and other constituents to send them to friends and family.

Provide constituents with an online service
Constituents typically are involved with an organization because they care about its mission. By offering graphical, motivational, humorous, fun or informative eCards, an organization provides a valuable service for constituents. Supporters now have a fun and easy-to-use tool for promoting the group and its cause to others. Compared with a form letter sent from an organization's website, eCards are a friendlier, more personal way for a constituent to encourage someone he or she knows to get involved.

EXAMPLE: ECARDS

Oklahoma Medical Research Foundation (OMRF), one of the nation's oldest and most respected nonprofit biomedical research institutes, wanted to spread the word about their nonprofit to garner further community support for the organization's life-saving medical research. OMRF knows its core audience – fans of scientific research, and also medical professionals, patients, and the families who rely on them. With this audience in mind, OMRF decided to move forward with the theme "geek…it's the new chic." The nonprofit launched an online multi-part giveaway campaign with a chance to win a "Geek Pack." Current subscribers were invited to enter for the chance to win by simply forwarding funny content (in this case entertaining eCards which OMRF designed based on a Convio template) to friends and family. Each eCard sent counted as an extra entry in the drawing. With a response rate of 9%, OMRF found that many of its supporters willingly forwarded information about OMRF. Their combined efforts helped to build community awareness and got the foundation's "research is cool. pass it on." message into more than 300 new inboxes. In addition to an overall 5% increase in their list, OMRF now knows which of its constituents are proud to expose their "inner nerd" and talk to friends and family about the importance of research. With consistent, high quality stewardship over time, the foundation has increased the probability of converting these supporters into volunteer fundraisers.

Tell a Friend Email About the Chance to Win a Geek Pack

Integrated (Online/Offline) Campaigns

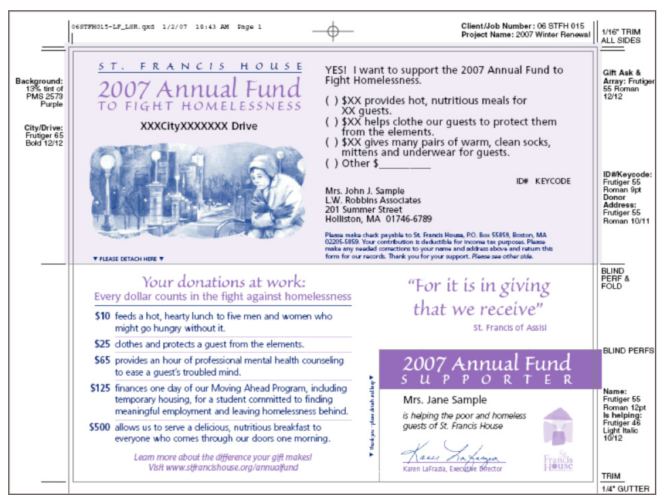
It's important for your organization to operate in a multi-channel mode, creating campaigns that are promoted and reinforced both online and offline to maximize constituent engagement and results.

EXAMPLE: INTEGRATED CAMPAIGNS

St. Francis House, a nonprofit, nonsectarian day shelter, improved its communications and reached out regularly to supporters, by sending a scheduled email newsletter, launching coordinated online and offline fundraising campaigns, and segmenting constituents based on giving history and other data collected. This integrated communications strategy helped St. Francis House increase the size of its email housefile from 150 to 1800 email addresses within 12 months, and raise more than $73,000 online within 10 months — exceeding the organization's fundraising goal by over 500%. In addition to attracting many new donors who gave online, St. Francis House also increased online giving from existing donors who traditionally gave offline.

"Ask" Email from Three-Part Welcome Series

Online Appeal Complements Direct Mail Piece



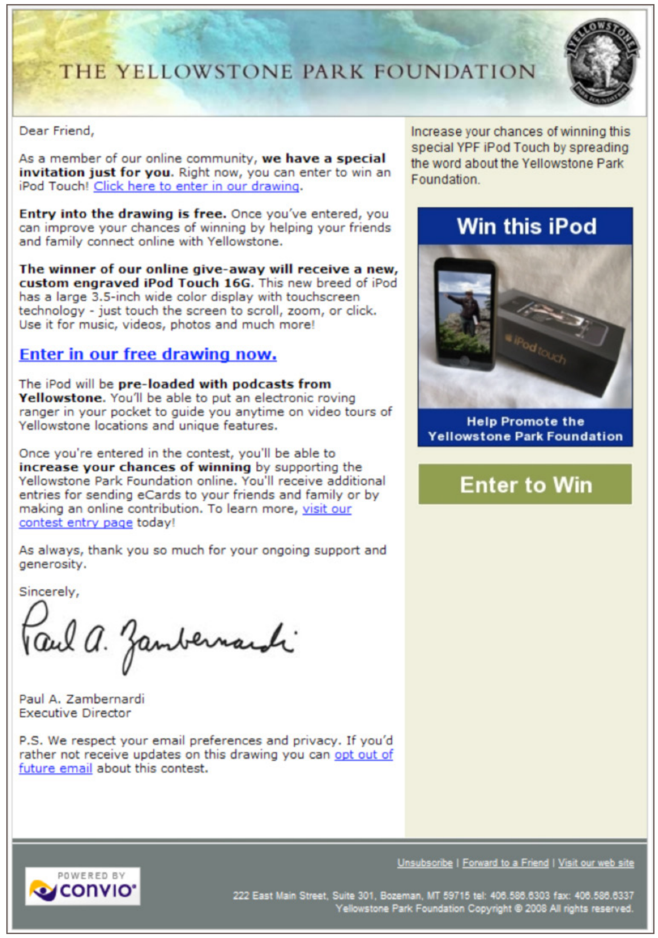
Offline Proof of Direct Mail Piece

List Building Campaigns

With email as the cornerstone of your organization's online communications, list building campaigns should form an integral part of your strategic efforts.

EXAMPLE: LIST BUILDING CAMPAIGNS

The Yellowstone Park Foundation (YPF), a nonprofit organization started to protect, preserve, and enhance Yellowstone National Park, needed to grow awareness of their park improvement and conservation activities, in order to connect with a wider community of potential supporters. Convio's Go! Program consultants worked with YPF to define an online giveaway contest — publicized entirely by email and the foundation's website — that highlighted compelling features of the park experience while empowering supporters to spread the news within their online networks. The contest prize was an iPod Touch, known for its ubiquitous appeal to tech-savvy individuals seeking music, photos, videos, and more. This particular iPod Touch came engraved by the foundation and pre-loaded with Yellowstone ranger podcasts that would "put an electronic roving ranger" in the pocket of any park visitor. The campaign included a three-part email series to current subscribers, and encouraged entrants to increase their odds of winning by sending eCards about the contest to friends and family, or by donating online. With over 12,000 contest entrants yielding a fresh influx of park supporters and new list members, the foundation brought their message of park preservation to many more members of the public. With their ongoing email newsletter series, YPF plans to nurture these new relationships for long-term mutual benefit.


THE YELLOWSTONE PARK FOUNDATION

Dear Friend,

As a member of our online community, **we have a special invitation just for you.** Right now, you can enter to win an iPod Touch! Click here to enter in our drawing.

Entry into the drawing is free. Once you've entered, you can improve your chances of winning by helping your friends and family connect online with Yellowstone.

The winner of our online give-away will receive a new, custom engraved iPod Touch 16G. This new breed of iPod has a large 3.5-inch wide color display with touchscreen technology - just touch the screen to scroll, zoom, or click. Use it for music, videos, photos and much more!

Enter in our free drawing now.

The iPod will be **pre-loaded with podcasts from Yellowstone.** You'll be able to put an electronic roving ranger in your pocket to guide you anytime on video tours of Yellowstone locations and unique features.

Once you're entered in the contest, you'll be able to **increase your chances of winning** by supporting the Yellowstone Park Foundation online. You'll receive additional entries for sending eCards to your friends and family or by making an online contribution. To learn more, visit our contest entry page today!

As always, thank you so much for your ongoing support and generosity.

Sincerely,

Paul A. Zambernardi

Paul A. Zambernardi
Executive Director

P.S. We respect your email preferences and privacy. If you'd rather not receive updates on this drawing you can opt out of future email about this contest.

Increase your chances of winning this special YPF iPod Touch by spreading the word about the Yellowstone Park Foundation.

Win this iPod

Help Promote the Yellowstone Park Foundation

Enter to Win

Unsubscribe | Forward to a Friend | Visit our web site

POWERED BY convio

222 East Main Street, Suite 301, Bozeman, MT 59715 tel: 406.586.6303 fax: 406.586.6337
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Invitation to iPod Touch Giveaway

Membership Campaigns

Using the Internet can help member-based organizations to recruit new members through targeted email solicitations to its email file. In addition, it can help organizations steward relationships with existing members, positively influencing renewal rates.

Carnegie Museums of Pittsburgh boosted its member renewals and revenue through regular, personalized online communications including email newsletters and other email updates based on each constituent's interests. This attention to developing online relationships worked — during the first year of online communications, 88 percent of the members who received email newsletters renewed and 72 percent who received other email updates renewed, while overall renewal rates were 62 percent. In addition, the organization dedicated an area of its website to membership, offering multiple member level options and opportunities to log in for special member information. The organization raised $121,000 online, only one year after taking membership sales online for the first time.

Chicago Public Radio has also seen strong results by focusing on donor/member service using the Internet. Historically, a major challenge for public broadcasting stations has been retention of first-year members, however, sending members a high quality email newsletter has helped Chicago Public Radio grow first-year member retention rates. Those members who received the newsletter renewed at a 20 percent higher rate than those who did not.

Micro-Campaigns

Micro-campaigns can be a highly effective way of raising funds quickly for a specific project by targeting constituents who would be most likely to donate to the campaign.

For example, the **SPCA of Texas** sent email appeals to dog owners, requesting donations in support of replacing plastic water bowls — which can harbor bacteria — with more hygienic stainless steel bowls for the SPCA's dogs. In another campaign, the organization targeted cat owners with an email appeal for donations to support the purchase of cat litter for the SPCA's animal care centers. The result: the organization doubled its goals for both email appeals. Not only are these types of campaigns highly effective, they also allow you to conduct more campaigns without over-mailing the constituents in your email address file.

Peer-to-Peer Fundraising

Empowering your supporters with tools to connect their personal networks with your organization can boost donations significantly. Additionally, peer-to-peer fundraising will help you grow your housefile and increase constituent engagement.

EXAMPLE: PEER-TO-PEER FUNDRAISING

AIDS Foundation Houston, Inc (AFH), Texas' first organization dedicated to HIV prevention education and services, uses Convio Fundraising and TeamRaiserTM to give constituents and AIDS Walk participants easy-to-use tools to reach out to their personal networks on behalf of the organization. Working with Convio, AIDS Foundation Houston has increased total online donations for its annual Walk from $400,000 to more than $660,000 within two years, with total revenues from the Walk increasing 64%, from $597,000 to more than $944,000. Using Convio TeamRaiser has allowed AIDS Foundation Houston to operate more efficiently by streamlining communications with volunteers and donors, and enabling participants to expand online donations through their own personal networks. Peer-to-peer fundraising has helped AFH grow its email list from 4,825 usable email addresses to 10,375 within 14 months, expanding its outreach by 115%.

TeamRaiser Used for the Annual AIDS Walk Houston

Premium-Based Campaigns

Offering premiums, or gifts, for donations not only provides additional incentives for constituents to donate, it also gives your organization another chance to show donor appreciation. **Chicago Public Radio**, for example, offers premiums including chances to win prizes as an incentive for constituents to pledge a donation by a specified date. **The National Trust for Historic Preservation** offers gifts, such as a free tote bag, for new members.

Social Media

With the widespread adoption of social media, your organization should consider different ways to increase your presence on sites like Facebook, MySpace and YouTube. It is no longer the younger generation that is incorporating these platforms into their daily lives; the demographics are shifting and you need to plan accordingly.

EXAMPLE: SOCIAL MEDIA

Church World Service (CWS), an organization that works with partners to eradicate hunger and poverty and to promote peace and justice around the world, CWS saw an opportunity to reinvigorate its Mother's Day campaign and significantly increase the amount of online donations by pursuing strategic promotional opportunities. Re-branded from the "Best Gifts Catalog" to the "Mother's Day Catalog," the campaign was promoted heavily to CWS's entire email list through two emails, a homepage banner, and an offline mailer, as well as through Facebook and Twitter. Additionally, a "Wall of Inspiration" webpage was created so people could post information about how their mom inspired them. The Mother's Day campaign raised $9,617 online through 233 gifts in seven days, using an email list of approximately 31k. Of this total amount, 73% of all funds raised were driven by emails. The Mother's Day Catalog alone raised $7,251 online through 196 gifts, with an average gift of $37. These results represented a 286% increase in eCommerce catalog revenue from the same period the year prior.

Donors Choose Gift and Send a Mother's Day eCard

Special Events

Events — a key component of many organizations' development programs — are a great way to raise funds. Increasingly, organizations are publicizing events through email communications and their websites to improve attendance and donations.

EXAMPLES: SPECIAL EVENTS

The **Vision 5K** is a unique run and walk event where blind and sighted participants run or walk side by side. The annual event is coordinated and managed by four independent organizations that serve the blind and visually impaired, with the resulting revenue divided equally between these organizations. By implementing Convio online fundraising and marketing solutions, Vision 5K improved its web presence and email communications. That year, the organization raised more than $200,000 for the event, and broadened its reach by connecting with participants' friends and family.

Website Home Page

Volunteer Fundraising

Every organization understands the importance of its supporters, so why not take advantage of this valuable asset by empowering them to raise money in support of your organization?

Y-ME National Breast Cancer Organization used this approach for its annual RACE Against Breast Cancer fundraiser, enlisting the help of volunteers to raise money on behalf of the organization. Using Convio TeamRaiser, the organization gave its volunteers online tools for setting up their own fundraising pages and sending email solicitations to their networks of friends and family. For its 2004 RACE, the organization exceeded its goal of $2.5 million to raise $2.75 million, with more than $1 million raised online.

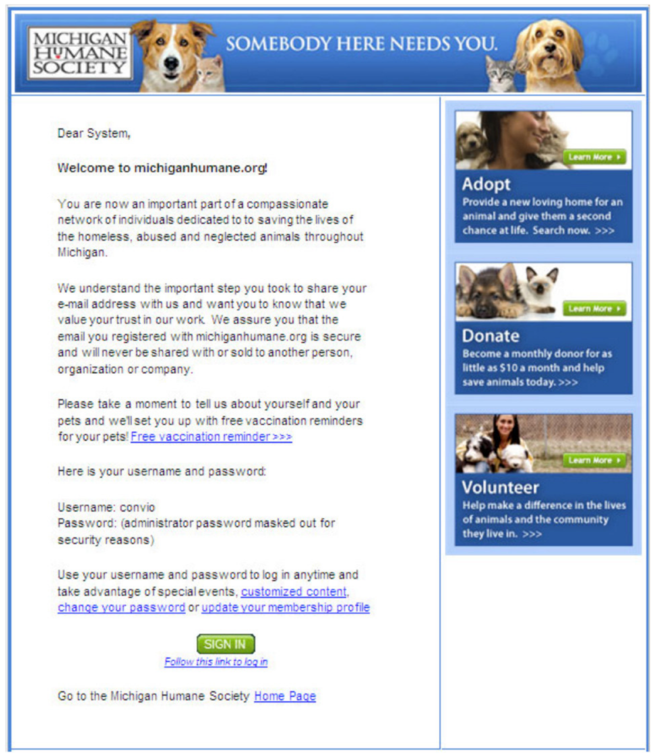
By encouraging supporters to reach out to their networks and by providing them with online tools to reach those networks, any organization can take advantage of this "viral" marketing technique to create an ongoing ripple of interest and support.

Welcome Series

Consider funneling new constituents through an email welcome series to bring them into a closer relationship with you right after they give you their email address. This strategy can serve as a thoughtful welcome that promotes ongoing engagement with your organization, while giving you additional control over the timing and content of your communications to new constituents. After an individual has received all of the emails in the welcome series, they can be added to your larger email list and receive the regular communications sent by your organization.

EXAMPLES: SPECIAL EVENTS

The **Michigan Humane Society (MHS)** wanted to find an effective way to cultivate new registered constituents into donors as quickly as possible, and maximize retention rates. After years of sending the basic registration response of one "welcome" email, MHS designed and implemented a three-part welcome series of emails that welcomes new registered users, informs them of the organization's work, and introduces them to the president of the organization. Included in each of these messages are opportunities for the constituent to take three actions: adopt, volunteer and/or donate. Convio compared six months of results of those individuals who received the single "welcome" email from MHS, with those who received the three-part welcome series. There was 10% higher retention rate for those who received the welcome series. Additionally, the average gift of welcome series recipients was, on average, $2.17 higher per gift than the non-welcome series group. There was also an increase in the number of gifts per donor for the welcome series recipients, who donated nearly $60,000 more than the recipients of the single welcome email.



First Email in the Three-Part Welcome Series

SPOTLIGHT ON CONVIO

Convio builds our software and services around a simple but powerful philosophy: you need action and results, not just technology.

Convio Online – Online Marketing and Fundraising Solutions

Convio's online marketing software suite includes tools for fundraising, advocacy, event fundraising, ecommerce, tribute/memorial sites, web content management, and email marketing. All of our online marketing products share a single online marketing database, Constituent360™ to give you a complete view of your supporters' online activities.

Convio Fundraising & Donations

Convio Fundraising delivers the online capabilities you need to raise money and membership revenue for your organization. With best practices built directly into the software, creating online campaigns has never been easier. More than a "donate now" button on your website, Convio Fundraising helps you build and foster relationships through online campaigns.

Shape the online donor experience by quickly building online donation forms that can be easily customized — allowing you to respond to urgent events and create branded micro-sites to increase results. Donors can direct their gifts to specific campaigns or causes online. Your organization can set up premium gift levels, give loyalty reward points, and allow repeat donors to set up regular payments online. Comprehensive summary reports give you insight into your campaign results. Trend and status reporting helps you continually grow donations and membership by understanding and improving success factors.

Convio Services

More web traffic. Improved response. Increased fundraising. Amazing things can happen when you combine Convio's leading online marketing and fundraising platform with our strategic, creative and technical services.

You may not have the staff, time or skills to develop and execute your fundraising and marketing strategy, and you can't afford to take risks or waste time. You need to get results from your technology investment. That's where the Convio Services team comes in.

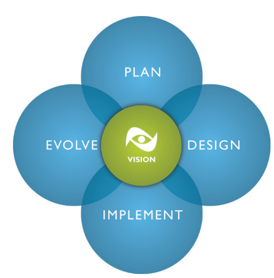
The Convio Services team is our in-house agency and professional services group — the largest of its kind serving the nonprofit sector. Our team members are experienced professionals passionate about charitable change and helping our clients achieve sustainable results.

We follow our proven VISION™ methodology to help you translate your mission into an online or integrated marketing program that successfully acquires, engages and converts individuals into lasting supporters. VISION helps produce measurable and sustainable results with any online initiative — fundraising, advocacy, list-building, communications, and your entire web presence.

LEARN MORE

Visit our portfolio to see just some of the examples of work we could do for you:
www.convio.com/portfolio

Then, call us, and let's get moving together.



The Convio Common Ground™ CRM System

We've built the first donor database/constituent relationship management (CRM) system that helps you move beyond just storing data, to using data for raising money more effectively and advancing your mission. Convio's Common Ground donor database/ CRM system transcends traditional donor management by delivering powerful, yet straightforward tools that manage and track donors and other supporters — giving you a full view of all of your constituents.

LEARN MORE

Learn more about Convio Common Ground at **www.convio.com/commonground**.

Convio TeamRaiser™ for Special Events

Convio TeamRaiser is a complete online software solution for tapping into the personal networks of your strongest supporters and mobilizing volunteers over the Internet. It allows your organization to take advantage of your most valuable assets — your supporters — by empowering them to raise more money for your cause with a convenient, effective way to receive donations from friends and family.

With TeamRaiser, you can give volunteers the tools they need to easily set up Web pages associated with your organization and events, plus email communication capabilities to mobilize friends and family, easy online donation capabilities and reports for measuring progress. TeamRaiser also offers optional event management tools for posting a calendar to your website that displays event listings and allows constituents to register or purchase tickets for events online.TeamRaiser includes:

» online participant center
» personal pages for participants
» email tools for participants
» email marketing capabilities for the organization
» web publishing tools for posting event information
» configurable gift and registration forms
» credit card processing
» comprehensive reporting

About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations.

ADDITIONAL RESOURCES

GUIDES

Toolbox for the Modern Nonprofit: Donor Management Made Easy
www.convio.com/donor-management-guide

How to Maximize the Fundraising Success of Your Event Participants
www.convio.com/eventchampionsguide

Integrating Online Marketing (eCRM) with Direct Mail Fundraising
www.convio.com/integratedmarketing

TIP SHEETS

Online Fundraising Tip Sheet
www.convio.com/online-fundraising-tips

5 Proven Strategies of the Top "Run Walk Ride" Events
www.convio.com/run-walk-ride-resources

The Basics of Email Marketing for Nonprofits
www.convio.com/email-basics

RESEARCH

The Convio Online Marketing Nonprofit Benchmark IndexTM Study
www.convio.com/2010benchmark

The Next Generation of American Giving
www.convio.com/nextgen

The Secret of Online Success: Why Structure Matters
www.convio.com/structureguide

The Wired Wealthy: Using the Internet to Connect Your Middle and Major Donors
www.convio.com/wiredwealthy

Convio Client Portfolio
www.convio.com/portfolio

GLOSSARY

Above the Fold
The portion of a Web page or email that is visible without scrolling. The fold varies depending on the resolution settings on a visitor's monitor. At lower settings (i.e. 640x480) the fold is relatively high on the page. At higher settings (i.e. 1280x1024) the fold extends much further down the page. Decisions concerning what goes above or below the fold are often made based on a minimum targeted resolution.

Email Append
The process of adding an individual's email address to that individual's record inside a marketer's existing database. This is accomplished by matching the marketer's database against a third-party, permission-based database to produce a corresponding email address.

Micro-Campaigns
Campaigns targeted to constituents who would be most likely to respond to the campaign subject matter.

Online Community
A community of constituents sharing common interests, ideas and feelings over the Internet.

Online Constituent Relationship Management
Using the Internet for the process of collecting information about past, current and prospective constituents, tracking their activity with the organization and aiming to build relationships with them to encourage future support.

Page Wrapper
A consistent, graphical element (usually in the masthead position or along the left side of the page) that is branded to your organization and frames the content of each page of your website.

Search Engine Marketing
Involves posting advertisements in search engine paid listings based on selected keyword phrases to drive visitors to a website; also referred to as pay-per-click, or PPC, advertising, because ad buyers pay only when a visitor actually clicks on their ad.

Search Engine Optimization
The process of optimizing your website so that it does well in search engine listings

Spam Checker
Software functionality that allows you to check emails prior to sending for anything that might trigger spam filters — such as excessive punctuation in a subject line.

Viral Marketing
Marketing phenomenon that facilitates and encourages people to pass along a marketing message.

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convio® MOVE PEOPLE™

convio
MOVE PEOPLE™

NONPROFIT WEBSITE FUNDAMENTALS

Building a Website That Supports Your Mission

THIS GUIDE INCLUDES:

- *Benchmarks for Measuring Your Website Performance*
- *Must-Haves for a Successful Website Redesign*
- *Keys to Successful Website Performance*

TABLE OF CONTENTS

ABOUT THIS GUIDE

This guide was created by Convio Services with the expertise of working on Internet projects with more than 1,400 nonprofit organizations throughout the United States and Canada. It's designed specifically for nonprofit professionals as a handbook about the basics of building a website to support your mission. It describes how to design or redesign your website, how to drive traffic to the site, and how to measure your website's success.

For more detailed best practices about online marketing, refer to the "Additional Resources" section at the end of this guide, or visit www.convio.com/our-research

INTRODUCTION

Your website can be one of the most effective tools you have in your marketing toolbox. While your email communications and fundraising campaigns reach out to supporters and potential supporters, your website is catching people as they come *in* to your organization. It's usually the first place that people go to find out about your organization. It's often where they go to donate. It's your chance to capture new supporters and get them more involved. It should reinforce your organization's brand and make the case to support your organization. ***So ask yourself: is your website doing everything it should to help you achieve your goals and support your mission?***

▸ Consider This:

- **86% of major donors** go to an organization's website before making a new gift to that charity.[1]
- **65% of donors** who use the Internet check an organization's website every time they give to that charity.[2]

Yet

- **57% of organizations** fail to clearly state their mission on their homepage.[3]
- **96% of organizations** fail to make the case on their homepage to support their organization.[4]

With the right tools and approaches, your site can be a powerful vehicle for engaging constituents, driving donations and building enduring support.

This guide focuses on the fundamentals of how to evaluate and tune up your website so that it is truly working for your mission. With topics ranging from home page strategy and design to driving traffic to your website and evaluating your website's effectiveness, this guide will help you transform your organization's site into a powerful marketing tool that gets results.

[1] Convio experience working with more than 1,400 nonprofit organizations.
[2] Convio experience working with more than 1,400 nonprofit organizations.
[3] Nielsen Norman Group Report on Nonprofit Usability, March 2009.
[4] Nielsen Norman Group Report on Nonprofit Usability, March 2009.

IS YOUR WEBSITE AILING?

Whether your website woes are obvious or you're just looking to make some tweaks to make it more effective, ***the simple step of examining your site with a critical eye is a step in the right direction.*** You can start by knowing some of the most common pitfalls of site design. Take a look at the following signs of an ailing website, and use them as a guide to see if you can identify any areas where your site could use some adjustment.

▸ Seven Sure Signs of an Ailing Website

1. ***Your organization's mission is missing.***
   Your home page should state your mission in about 15 words or less so that new site visitors can quickly understand exactly what your organization does.
2. ***You spend more time building HTML web pages than creating your message.***
   Whether you are writing a paragraph for your home page, or crafting an email appeal, great content is the cornerstone of an effective website. Be sure to give it the time and focus that it deserves.
3. ***Your content is "inside out".***
   If you use jargon and terminology that only insiders at your organization would understand or relate to, you risk alienating your site visitors.
4. ***Your site visitors don't stick around.***
   In working with clients, Convio has found that more than 50% of first-time visitors will reach your site and leave within 30 seconds without viewing much of your content.
5. ***Your site visitors can't get around without a compass and a map.***
   If your website navigation offers more than seven main options, you risk frustrating your site visitors and losing them forever.
6. ***Your online donors want less (clicks, that is).***
   If site visitors must click more than once from any place on your website to make a gift, your site is not as donor-friendly as it should be.
7. ***Your site visitors don't know how to get involved.***
   From your home page, could a first-time visitor quickly find two or three ways to get involved with your organization? They should be able to.

So, how do you evaluate these signs correctly? After all, you and your organization's other staff members may be too familiar with your website to accurately assess it from a new visitor's point of view. Try a test: Ask a few friends or family members to look at your organization's home page and talk with them about the items listed above. You may be surprised at how many areas of your website could use some TLC.

Why Pursue A Website Update Now?

If your website suffers from one or more of the seven ailments listed previously, it's time for a website update. But you may also have organizational and strategic reasons to update your website.

Here are a few situations that should let you know that it's time for an update:

- Your organization is updating its mission or vision.
- You are not meeting your online fundraising objectives.
- You need to acquire new email addresses.
- The demographic profile of your supporters is changing.
- The donor experience on your site is cumbersome.

4 MUST-HAVES FOR A SUCCESSFUL WEBSITE REDESIGN

Imagine a website that engages visitors to interact with your organization. They regularly return to your site and recommend it to their friends and family. Site traffic increases each month. It doesn't have to be just a dream. Whether you're starting a whole-website redesign, or just wanting to tune-up your site, the next sections will tell you how to start making your website dreams a reality.

I DO YOUR RE-DESIGN PREP WORK

When you're thinking about a website redesign, you can take some preliminary steps to ensure success. Whether you're redesigning it yourself or with a third party company, completing the following tasks in advance will save you time and frustration down the road.

- ***Determine the goals for your redesign.*** Have some conversations within your organization about what's working and what's not working with your current website. Document those conversations. Decide what outcomes you're expecting with the redesign so you can share those goals with your designer.
- ***Define your core project team.*** Determine who in your organization will be responsible for making decisions about the new site. Include anyone who will need to approve the new design. Also include major content contributors—they'll want to have a say in what stays and what goes. And, don't forget to include any key strategists in your organization that know what types of people visit your website. Be judicious in deciding on the final project team since the larger the team, the more challenging it will be to get sign-off on key milestones.
- ***Create a comprehensive content map.*** Create a spreadsheet of the content you already have on your website. From there, you can make decisions about what is important, what needs updating, and what is outdated.
- ***Consider your organization's brand identity.*** If you haven't already done so, determine and document your organization's logo and color scheme so your designer will have some guidelines. Collect any photography that could be incorporated and also any print materials that may serve as a guide to your brand.

▸ Sample Website Goals

- *Engage and build relationships with supporters*
- *Promote a sense of online community*
- *Solicit donations*
- *Deliver services educating people about your mission*
- *Build your housefile by acquiring new emails*

2 LISTEN

When you initially decide to redesign, it may be based on feedback from your site visitors. You may have heard from your supporters that your site is outdated or that it's difficult to find information. Alternatively, you could be redesigning because of a push from within your organization.

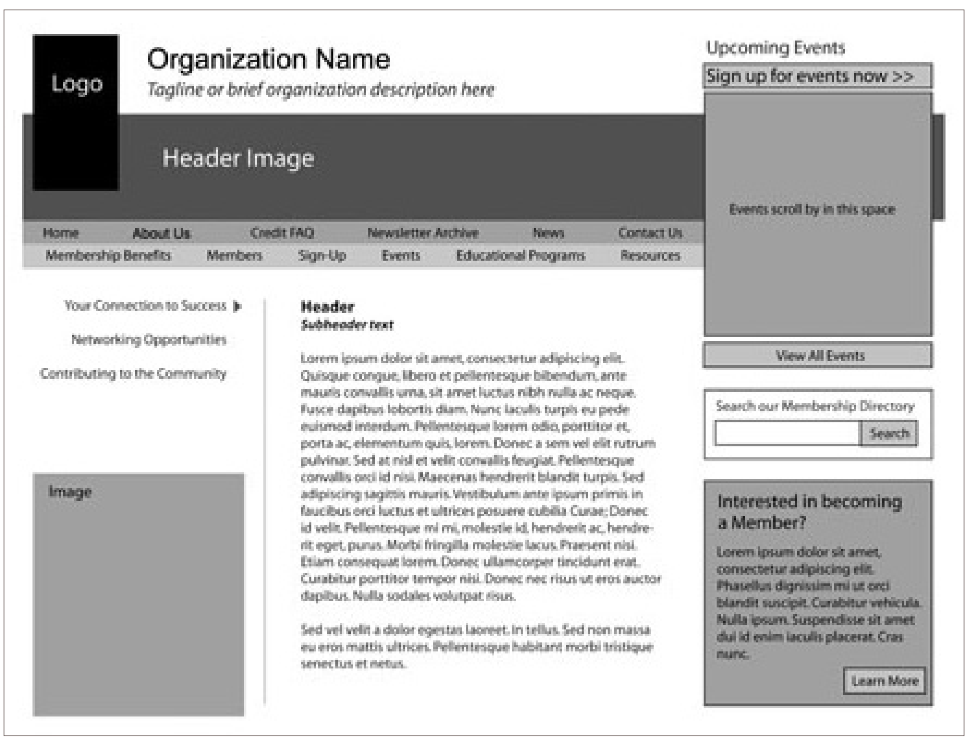
Either way, ***it's important to keep in mind that your website is for the visitors.*** Ask them what they want that they don't have today. Ask what issues they have with your current site so you don't make the same mistakes again. And, most importantly, listen to what they have to say.

▸ The User Experience Audit

Consider working with a web usability expert to complete a user experience audit. This type of audit includes content and audience analysis, usability testing, and data analysis to ensure your website meets your organization's goals.

For examples of this type of audit, see http://www.convio.com/portfolio

You can have these conversations through an online survey or through individual conversations with your constituents. You can assess data you may already have from emails or calls about the website. Collecting this data and incorporating it into your must-have list is the first step to a successful, user-centered design.



Use wireframes to test the structure of your website before you begin the design.

Once you've made some research-based decisions about your new website, you should test them using wireframes—basic visual guides used in interface design to suggest the structure of a website and relationships between its pages before the design has even begun. After all, if you don't have a strong underlying structure, there's no way to cover it up with a snazzy new visual design. Also, participants are more likely to provide candid, direct feedback to wireframes. They see an unfinished product and realize there's still time to make improvements.

Run your wireframes by a few members of your target audience. Ask them where they'd go to donate, learn more about you, or accomplish other key tasks. Then, make changes based on what you learn.

3 CONSIDER YOUR NAVIGATION

All the user research, wireframes, perfectly architected homepages and site designs don't mean much if the navigation doesn't work. While you need to do the user testing to ensure your navigation makes sense, the following guidelines will get you well on your way to navigation success.

1. ***Follow the seven plus or minus two rule.***
   This rule is based on the fact that people can only absorb about seven (give or take two) options in a list before they start forgetting the first options they read. That means you should have around seven main navigation options and that in each section, you should only have around seven options. This applies to drop-down, or flyout, navigation, too—however, if your main navigation options are named clearly, you shouldn't need to display drop-down options. Remember that it's okay to have some pages on your site that are not represented in the navigation.
2. ***Be unambiguous.***
   Try this: Say each of your main navigation options aloud alongside each of the other options. Do you get confused? Do some of the words mean something similar? If they do, think about how you could rename them to make them clearer. Chances are, if it's ambiguous for you, your users are confused. The navigation below is a good example of an unambiguous navigation since each choice is distinct.

Organize your website into distinct categories.

3. ***Represent your entire site.***
   Identify your visitors' goals when they visit your site. Maybe they want to learn about your organization, read the latest news about you, take action on an issue, or make a donation. Make sure your navigation provides clear ways for users to access each of those goals. The following examples show two types of navigation, both from the same site, that provide options representative of an entire site. This particular schema uses an informational, or topical, navigation and an action-oriented navigation to provide a wide array of choices.

Topical Navigation:

Topical navigation can be very effective for guiding visitors through an experience path on your website.

Topical navigation with mouse-over sub menu. ***Pro:*** *You save valuable web page real estate for content.* ***Con:*** *Requires user to investigate further to see the entire set of options.*

Action-Oriented Navigation:

Action oriented navigation allows site visitors to take action immediately. They can simply click and go without mousing over a set of options. However, this style of navigation can take up more space on your web page.

Action-Oriented Navigation allows you to guide website visitors down a pathway of focused actions, increasing the likelihood of conversion.

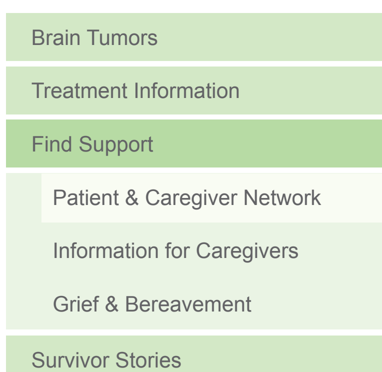
4. Take the navigation stress test.

The navigation stress test is all about seeing if your navigation does its job of getting visitors around the site. Your navigation should tell users where they are, where they've been, and where they can go. This test provides an easy way for you to check if your navigation is successful in doing these things. The following navigation schema shows how you can provide visual cues to users about where they are on your site through your navigation. First, you'll see the breadcrumb navigation that many sites offer as a way to see the path the user has taken on the site. Then, you'll see the left navigation from the same site that also highlights the section and page the user is on.

Breadcrumb Navigation:

A breadcrumb navigation shows the path the user has taken on your site and indicates the page they are currently on.

Left Navigation:



A left navigation shows a hierarchical representation of where the user is on your site.

SPOTLIGHT ON
VISUAL HIERARCHY

What catches your eye when you look at your website's homepage? What is the first thing you see and the first thing you want to click on? These are questions you should ask during a usability test to ensure your visual hierarchy is coming through clearly and consistently. Think of the visual hierarchy as the pecking order of a page's content, providing cues as to what's most important. If your organization wants, first and foremost, to bring in donations, then a compelling ask should rank high on your list. Maybe you'd rather get visitors to take an action alert or read a new study you've published. Your visual hierarchy should reflect your organization's goals, whatever those may be at the time.

You may be so used to looking at your website that you may not see a visual hierarchy anymore. Or, the one you do see may be artificially influenced by what you know is most important. In that case, have a friend take a look at your site and tell you what they see first. You could try a "five-second test" where you display the homepage for five seconds, and then close it and ask your friend to write down what he or she remembers. If your friend's list doesn't correspond with your organizational goals, then consider rearranging the page or redesigning certain elements. You'll likely see more clicks and actions taken as a result.

▸ The 5-Second Test

Display your homepage for five seconds—then close it and ask a friend to write down what he or she remembers. Effective websites tell visitors within seconds of their arrival:

1. Where they are
2. What they can do
3. Why they should act

4 DO SOME SPRING (CONTENT) CLEANING

In some ways, you can think of your website as a closet and your website content as your clothes. Every now and then, you just need to give it a good cleaning.

Here's how: First, take a few minutes to really think about what you want people to achieve on your site and how you want your site to be perceived. Next, go to your site and click around it the way you would if your friend sent you a link to a site you'd never been to before (think: rummaging through a stranger's closet). Ask yourself a few questions as you click around, approaching the content like any clutter-cleaning project: Is there a consistent theme in what you have on your site, or does it seem disorganized? Are you too trendy in some sections? Has the content evolved with your organization? Are there areas of the site that never get updated? If so, is this because you simply have neglected them, or is it because they are no longer useful? These are basic questions, but the answers can reveal a lot about your site.

After this exercise, go back to the content map that you created (see previous *Do Your Pre-Design Prep Work* section). Add a column to your map and start prioritizing content. Remove anything you don't want on the new site.

Categorize this way:

1. Content that MUST be on the new site;
2. Content that should probably be there, but isn't extremely high priority;
3. Content that would be nice to have.

Then, move the "2" and "3" items into a separate spreadsheet and only focus on your "1" items to see what needs to be finessed, rewritten or completely overhauled.

> Keeping your website clutter-free is not effortless.
> But neither is finding information on a site that's in disarray.
> A neat, organized website is well worth the effort.

Like keeping a closet orderly, keeping your website clutter-free is not effortless. But neither is finding information on a site that's in disarray. A neat, organized website is well worth the effort.

OPTIMIZE YOUR SITE FOR SEARCH ENGINES

The easier it is for constituents to find your organization on the Web, the more your ability to attract new donors, volunteers and other supporters will improve.

The primary way that people look for information online is through search engines. ***Search engine optimization (SEO) is the process of improving the visibility of a website*** or a web page in search engines via the "natural" or unpaid ("organic" or "algorithmic") search results.

Search engines used advanced mathematical equations to analyze and sort websites. Websites that correspond to those equations (algorithms) with highest relevancy get top spots in search results. The algorithms Google, Yahoo! and Bing use are somewhat decoded through various tests by search engine optimizers, however, there is no way to truly know since these methods are proprietary.

SEO is not to be confused with "paid search marketing", oftentimes referred to as pay-per-click (PPC), which is marketing a website via paid listings or ads on search engines. An easy way to remember the difference: In Google™, when you type in a word and it returns a set of results, the site listings on the left are called natural or organic search results. The order in which they appear or the rankings is the result of SEO, while the advertisements on the top or right are the result of PPC, that is, organizations that have paid to have their text ads appear here.

▸ Measuring SEO Success

SEO requires an investment of time and a willingness to experiment. To determine the focus of your efforts, you should first have a good understanding of your organization's audiences and which search engines they use. Website reporting tools can provide this information.

Successful SEO is an ongoing, evolving effort, so go in with a goal in mind.
Receiving top placement in search rankings may not be realistic given available budget and resources, but getting on the first page may be. Ultimately, your metrics may include improved result rankings, increased site traffic, increased number of repeat visitors and, most importantly, increased number of conversions. A conversion can be defined as more volunteers registered, more newsletter subscriptions or more donations collected.

Remember, entire industries have been developed around SEO, and strategies can get complex and expensive. Having quantifiable goals will help keep you on track as your content changes and you continue to optimize your site.

Perhaps the most important step in creating an SEO plan is to develop a list of keywords and keyword phrases. These are the words that most people likely will type into a search engine to find your organization. A list of 10-15 target keyword phrases is a good start. Once you've created your list of keywords, use them as much as possible throughout your website without making your web content sound convoluted.

Another important consideration in SEO is what and how other websites link to your website. As a nonprofit, your organization has advantages over for-profit businesses. People may perceive your website content as more honest and altruistic, so you may find it easier to get other webmasters to link to your site. Consider what partner and supporter websites could link to your website, and then ask their webmasters to link to your site.

Here's another tip: In addition to providing the actual search function, most search engines have a directory that visitors can browse. One example is Google's Open Directory, also called DMOZ (http://directory.google.com). Submitting to these directories is generally free. Note, though, that submitting does not guarantee improved results ranking; if you haven't optimized your site using the tactics outlined above, your site may not benefit from submission.

There's no doubt: SEO can get complicated. Start with the basics mentioned previously, and then take a look at SearchEngineWatch at http://searchenginewatch.com. It's a comprehensive resource for information about how search engines work, recommendations for SEO and PPC strategies, new search engine features, and latest news about the search engine market space.

For more helpful tips on optimizing your site, search the Internet for best practice blogs. Some of our favorites are http://www.seomoz.org and http://www.seobook.com. If you're looking for professional recommendations or to outsource your SEO there are many local and national agencies that can help you improve.

▸ The Basics of Coding for SEO

- ***Change TITLE tags to include the name of your organization and target keywords.*** For example, rather than naming the volunteer registration page "volunteer-signup," an animal rescue group might try "volunteer-signup-shelter-Smithville-Animal-Rescue."
- ***Don't focus much energy on meta tags*** for description and keywords as these are becoming less important to search engines.
- ***Use keywords in image ALT tags*** as well as in the actual file name of the image.
- ***Use conventional HTML***, such as H1 and H2, for the titles and subtitles on pages.
- ***Decrease the amount of code in pages***. Copy that is higher on the page in HTML source code will be more heavily weighted by search engines. You can accomplish this by eliminating unnecessary tables and placing JavaScript and CSS styles in external files.

MANAGING YOUR CONTENT

Keeping your content up to date so that your supporters stay in the know is key to your success. Relevant content is the most powerful tool in your web arsenal for inspiring people to take action and building your constituency.

But as you add more content over time and your pages grow in number, your site also grows in complexity, and you'll need an efficient way to manage your content.

Content management systems (CMS) are a must-have for any organization that needs to update, add, or remove content on a regular basis without having HTML skills or asking a technical resource to do so. A CMS will relieve you of manually managing content and help you streamline your updates, saving you time and adding value to your constituent resources in the form of more timely, relevant, and easy-to-find web content.

▸ Getting Started

The best website redesign will fall flat if you don't have proper processes in place to keep your website updated. Take time to identify who is responsible for what content on your website, and hold a regular meeting with content owners to ensure that everyone is synchronized.

With a CMS, you can:

- Have a professional site with relevant, up-to-date content even with a limited budget
- Distribute ownership to multiple content authors to keep messaging relevant and up-to-date
- Easily manage the structure, appearance, and navigation of your website
- Develop professional and attractive page templates to ensure consistent branding and imagery throughout the site
- Engage visitors with highly personalized content and encourage interaction through blogs, surveys, polls, donations, custom forms, and more
- Archive old content for future reference

While content management systems are now widely adopted, not all are created equal. Choose carefully. ***For more information on how to choose a CMS,*** visit http://www.convio.com/cms.

▸ In Case of Emergency...

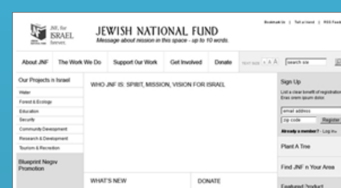
A CMS can really come in handy when you need to communicate at a moment's notice. For example, you can create an "emergency mode" home page version based on a simple design. Then, when an urgent event occurs, you simply have to choose from a set of pre-planned options (such as headline and image) and publish from your CMS.

CASE IN POINT
JEWISH NATIONAL FUND

JNF realized that it needed a website that demonstrated the scope of its vision—serving as the "central U.S. address for all things Israel"—and that would be flexible enough to adapt to its evolving mission in the years to come.

Website Home Page

Website Before Redesign



Wireframes For Redesign

Convio helped JNF improve the donation experience for existing supporters and attract a younger audience with its website redesign.

Using the best of what the Convio software suite has to offer, JNF:

- Launched the new JNF.org, powered by Convio CMS and eCRM (constituent relationship management tools) in early 2009
- Put in place a new creative strategy that offers a new online brand for JNF and all of the audiences they appeal to today
- Implemented focused marketing on its website, tailored to each target audience group's needs
- Encourages effective, personalized online interactions between constituents and the organization through the new website—which allows visitors to engage with JNF to do everything, including manage their purchases of trees to be planted in Israel, communicate directly with the JNF branch in their area, and receive dynamic content and messaging based on their areas of interest

DRIVE TRAFFIC TO YOUR WEBSITE WITH THE HELP OF SOCIAL MEDIA

While your website is a critical marketing tool for your organization, consider this: Your web presence is equally important. Your web presence is the complete landscape within which your website exists: email, social networking, search engines. How are people going to find that well-organized, compelling new website that you created if you don't spend time on your broader web presence?

Online channels and communications, such as Facebook™ and email newsletters, should link back to your site for more information. The idea is to tell prospects and supporters about the resources available to them on your website and keep the website content current and informative so that visitors will return.

Here are some ways to think outside your site to drive more web traffic.

▸ Website Promotion

In addition to promoting your website through online channels, be sure to include your URL in offline communications (eg., ads, brochures, business cards, direct mail, phone hold recordings, or voice messages).

Social Media is Key to Reaching Your Supporters.

Increasingly, organizations are leveraging social media to increase website traffic and brand awareness. Social media is a collection of Internet-based communication channels and tools that enable individuals to share information and develop a dialogue with like-minded people. It can mean anything from blogs and social

▸ Social Media Basics

Social media is a way to make more people aware of your cause, drive traffic to your website, and empower supporters to share your fundraising programs with their personal network.

Social media conversations occur on:

- Blogs (and micro-blogs)
- Online chat & message boards
- RSS
- Widgets
- Social networks
- Social bookmarks
- Podcasts
- Video & photo sharing websites
- Virtual worlds
- Wikis

networking websites to bookmarking websites. Don't be afraid to start small with one set of applications before trying something else. There are a lot of high-impact, low-cost things you can do to get started.

Bookmarking websites are a great place to begin. First, add bookmarks for key website entry pages on delicious.com, digg.com, reddit.com, and stumbleupon.com. Second, make sure your users can easily bookmark pages on these websites. Services like addthis.com and sharethis.com are easily integrated into most content management systems and allow your visitors to bookmark your pages and share content with others. Check your web analytics package for an increase in traffic from referring sites.

If you are a registered 501(c)(3), you can also set up a Cause on Facebook (http://www.causes.com) to promote your organization and your website. And, if you are using Convio Online Marketing products, look into the Facebook extension (http://open.convio.com/extensions/facebook.html) which is available to all Convio clients. It allows you to publish events, fundraising and advocacy campaigns directly to Facebook and drive people to your website for more information.

Also take some time to look into the YouTube™ Nonprofit Program (http://www.youtube.com/nonprofits). YouTube has thousands of organizations as members of this program who are using video to drive traffic to their websites and get people to take action such as donate or volunteer.

There are many, many more ways to promote your organization and its website through social media. Just remember that you don't have to do everything at once. Start small and see what works for you.

All generations of supporters are using social media and social networking to some degree. Whether your mission or goal is advocacy, fundraising, acquiring supporters, retention, or conversion, integrating social media and social networking into your marketing mix can significantly impact the effectiveness of your online programs.

GEN Y	
70%	facebook
49%	YouTube
49%	Mobile Phone Only
25%	myspace.com
16%	twitter

GEN X	
56%	facebook
30%	YouTube
27%	Mobile Phone Only
13%	myspace.com
11%	twitter LinkedIn

BOOMERS	
60%	facebook
55%	Bank Online
47%	eNewsletters
29%	facebook **(REG)**
17%	Texters

MATURES	
50%	facebook
48%	eNewsletters
34%	Shop Online
17%	facebook **(REG)**
5%	Texters

Media habits by generation. While all segments have a different dispersion of platforms and channels, social media plays a prominent role in the communication preferences of every segment.

CONVERT YOUR SITE VISITORS TO REGISTERED USERS

Once visitors arrive on you site, be sure you're doing everything possible to convert website visitors to registered supporters. Here are three quick tips for gathering contact information and email addresses from your website:

- ***Give site registration prominent placement.*** Dedicate a consistent area of your home page to promoting online registration. Place it in an eye-catching spot to reflect its importance. You might also use an image or graphic to draw attention to it. Don't forget to promote registration throughout the rest of your website, too—consider including a registration link in your page footer so the message will be included on every page of your site.
- ***Provide quick online registration.*** Use a web-based registration form that allows site visitors to register easily and quickly. Remember that the more information you request, the less likely people will be to complete the entire form. So, think carefully about the information you want to capture, and minimize the number of required fields—name and email address should suffice. You can always ask for more information about the individual through follow-up communications.
- ***Promote the benefits of online registration.*** Make registration compelling for your site visitors. Create special benefits for registered members, and link to a separate page explaining the perks, such as free email newsletters, or advance notification of upcoming events.

▸ Communicating With the Next Generation of Donors

Research from Convio about contrasting charitable habits of different generations shows that for the foreseeable future, there's unlikely to be any single communication channel that plays a dominant role. The web/email and direct mail, though, will likely be the primary channels, augmented by new media channels such as social media.

But, remember: No single communication channel is as important as the quality of your message and your ability to inspire and engage the hearts and minds of your supporters.

For tips on effectively communicating with Generation Y, Generation X, and Baby Boomers, refer to: *The Next Generation of American Giving* (see *Additional Resources* section at the end of this guide).

Build Constituent Profiles

Once you've captured site visitors' email addresses, consider gathering more data. ***Data about your supporters can help you better understand your constituents*** and how they like to interact with your organization. It can be used to recognize trends, compare campaigns, and identify what is (or isn't) working. Armed with this information, you can create effective, customized, targeted website content and email communications that demonstrate an understanding of the relationship your supporter has had—and wants to have—with your organization.

Follow these guidelines to gather more profile information:

- ***Use online surveys.***
  A simple online survey can allow you to gather almost any type of information simply by asking constituents to respond. By using an online survey tool, you can automatically add what you learn about them to their profile in your database.
- ***Capture data based on online behavior.***
  You can gain valuable insight into your supporter's interests simply by capturing data as they click through your website. By embedding trackable links in content on your website, you can flag a registered visitor's profile with information about their particular interests. If supporters respond to an email invitation for a volunteer fundraising event, for example, you can automatically capture this data and use it to send them future event information, or perhaps a volunteer newsletter.
- ***Integrate offline and online data into a single view.***
  If yours is like most nonprofit organizations, you probably already have a significant amount of information about your supporters stored in one (or more) offline databases—and spreadsheets, and scraps of paper. As you gather more data, consider using a constituent relationship management system that is built specifically for nonprofits to help you consolidate this information. Convio's Common Ground CRM system, for example, is a complete fundraising and donor management solution that helps you track the details of every relationship in a single database—from prospects, donors, and staff members to volunteers, event participants, and board members.

For more information about integrating your offline and online data into a single view, refer to *Toolbox for the Modern Nonprofit: Donor Management Made Easy* (see *Additional Resources* at the end of this guide).

MEASURE YOUR RESULTS

Driving traffic to your website is just one piece of the puzzle; ***you need to be measuring the traffic to truly understand your online marketing effectiveness***. The relative success of your website can be judged on a variety of criteria, depending on your goals and objectives. As you learn more about your constituents' online preferences, polish your message, and develop benchmarks for your website, you'll be able to fine-tune your strategy. Here are a few key metrics and benchmark numbers to help you evaluate your results:

- ***Monthly Unique Website Visitors***
  When used effectively, your website can convey the importance of your organization's mission and help you register new constituents so you can continue to communicate with them via email and motivate actions, such as making a donation or signing a petition. In the seminal research about the online behavior of mid-level and major donors, The Wired Wealthy study, Convio learned that 49% of online mid-level and major donors will always visit a nonprofit's website before making a first-time gift online or offline. Measuring your monthly unique website visitors will, over time, show you how well your website changes are working.
- ***Website Traffic Growth***
  The growth in your website traffic year-over-year is a good indicator of whether or not your website tactics are working. According to the Convio Online Marketing Nonprofit Benchmark Index™ Study, from 2008 to 2009, web traffic growth continued for most nonprofits, but at a slower rate. Web traffic growth in 2009 was in the single digits at 6% compared with double digit growth seen in previous years.
- ***Registration Rate***
  The registration rate describes your success at converting website visitors into registered constituents by getting them to voluntarily give their email address. This may happen by someone making a donation, advocating, buying a ticket for an event, purchasing an item via an online store, signing a petition, or joining an email list. The significance: Adding constituents to your email file gives your organization a way to continuously re-engage with them using email. A registration rate of 2 to 3% typically is good.

For more information about metrics and benchmarks for websites and email list, refer to the *Convio Online Marketing Nonprofit Benchmark Index Study* (see *Additional Resources* at the end of this guide).

For more information about the online behavior of mid-level and major donors, refer to *The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors* (see *Additional Resources* section at the end of this guide).

SPOTLIGHT
WEB ANALYTICS

Web analytics can give you valuable feedback about your users, trends, and the effectiveness of your site design and content. But don't take that feedback as scripture, because there are too many variables for these metrics to give you the full picture. Here are several myths about web analytics that could mislead you:

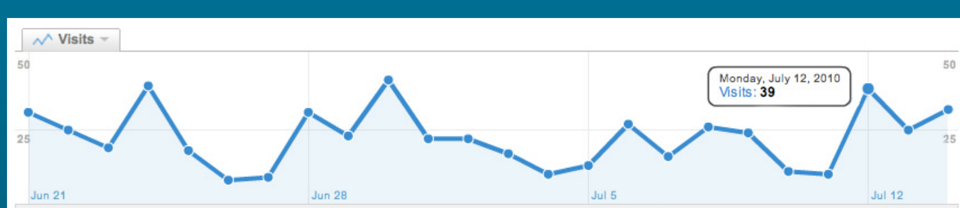
▸ Three Web Analytics Myths... Busted!

1. ***MYTH: Analytics tell us why our constituents do what they do.***
   BUSTED! Traffic data tells us how visitors use your site, but not why. To get the "why," nothing beats talking directly to your constituents. Ask your constituents about their reasons for coming to your site and their experience using it.

2. ***MYTH: Accuracy is the goal.***
   BUSTED! There are too many variables in the medium of the Web to expect hard and fast numbers. Cookies are disabled, pages are cached, or a script is pinged twice—any number of scenarios can combine to make your numbers less than 100% accurate. It doesn't really matter. The data you derive from web analytics is still good enough for useful insights.

3. ***MYTH: Traffic data is all numbers—hard quantitative stats, my friends.***
   BUSTED! Analytics is less about hard numbers and more about directionality. By observing changes to your key metrics over time, you can get a sense of how effective your website changes are.

Analytics are a useful way to get information on what's working, but don't forget to look beyond the numbers and rely on insight from your constituents, your research, and common sense.



Tracking website analytics helps every organization move from subjective to data-backed decision making. Google Analytics is a free solution that can provide invaluable information about how your web pages are performing.

WEBSITE SUCCESSES TO INSPIRE YOU

Nonprofits of all sizes and missions are using Convio to improve their websites, accomplish their online goals and drive results for their mission. Here are a few examples to inspire you:

American Health Assistance Foundation

- Experienced a ***63% increase in online giving*** in the first nine months after their new website went live
- Page views to the site increased 9%, unique visitors by 29% and ***total visits by 25%***
- ***Online gifts increased 46%***

Children's Defense Fund

- Improved internal website traffic and better staff understanding of content organization and integration, resulting in ***less time to maintain the website***, often due to dynamically driven and related content automation
- Google organic ***search visits increased 23%***
- ***Average time on website up 15%***; bounce rate improved 1.37%

Jewish National Fund

- New site offers ***effective, personalized online interactions*** between constituents and the organization, allowing visitors to engage with JNF to do everything—including manage their purchases of trees to be planted in Israel, communicate directly with the JNF branch in their area, and receive dynamic content and messaging based on their areas of interest
- ***Site visits increased 500%***
- New site enabled the creation of ***new online initiatives*** to improve education and awareness while leveraging integrated fundraising tools to better engage donors and create a consistent web presence across all online properties

UN Foundation

- ***Improved search engine optimization*** resulting in referrals from Google's organic search to climb more than 260% year-over-year
- Increased the number of unique visitors for one of the UN Foundation's websites by 45%; the corresponding ***email list grew by 26%***
- Showed a ***77% jump in unique page views*** for the organization's main website, and a 50% increase in the average time visitors spent on the site

Church World Service

- Mother's Day campaign ***raised $9,617 online*** through 233 gifts in seven days, using an email list of approximately 31k. 73% of all funds raised were driven by emails
- Saw a ***286% increase in eCommerce*** catalog revenue from the same period the year prior
- ***60% of donors took advantage*** of the campaign's eCard functionality, sending 135 eCards to 178 recipients

More Success Stories

For more examples of real world success, visit: http://www.convio.com/portfolio

HOW CONVIO CAN HELP YOU

Convio provides software and services that help nonprofits more effectively attract, engage and cultivate supporters. As a web-based platform, Convio is a cost effective solution that will grow with your organization and can integrate with other systems to extend your online reach.

Web-Based Software Suite

- Fundraising
- Donor Database & Management
- Events
- Peer-toPeer Fundraising & Events
- eCommerce
- Web Content Management
- Advocacy
- Email Marketing

Strategic and Technical Services

- Strategy Consulting
- Campaign Management
- User Experience & Research
- Analytics
- Website Design Services
- Technical Design & Integration
- Custom Development
- Training & Support

WHY CONVIO IS DIFFERENT

Passion

Our team is passionate about helping nonprofits further their missions and achieve real results. Over 75% of our client services staff has worked in the nonprofit sector. Meet our team and see examples of our work with clients at www.convio.com/portfolio.

Trusted Strategic Advisor

Convio is the preferred technology and services partner for over 1,300 nonprofits of all sizes—including over half of the top 50 charities—helping them to achieve tangible results through:

- Database Management & Segmentation
- List Building & Donor Acquisition
- Advocacy & Outreach
- Fundraising
- Event Participation & Fundraising
- Website Engagement & Conversion
- Online & Multi-Channel Strategies
- Training & Support

Track Record of Innovation & Results

We're a pioneer for online and integrated marketing for nonprofits. Here are just a few examples:

- ***Industry Benchmarks***—launched the industry's first benchmark study which we publish annually
- ***User Engagement Pathways***—created the concept of defining clear communications paths via email and website to increase engagement and conversions and build this into our product
- ***Accessibility***—partnered with Easter Seals to develop a first-time program to offer accessible technology, job training and employment opportunities for people with disabilities
- ***Convio Go!™***— launched the industry's first affordable, guided fundraising program resulting in a return of $3 for every $1 spent
- ***Driving Results***—In 2009, Convio helped nonprofits process: $921 million in online donations, 51.5 million advocacy calls to action, and 3.8 billion emails (95% delivery rate)

ADDITIONAL RESOURCES

- ***The Next Generation of American Giving*** is available at http://convio.com/nextgeneration
- ***Toolbox for the Modern Nonprofit: Donor Management Made Easy*** is available at http://convio.com/donormgmtguide
- ***The Convio Online Marketing Nonprofit Benchmark Index™ Study*** is available at http://convio.com/benchmark
- ***The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors*** is available at http://convio.com/wiredwealthy

ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.

BASICS OF EMAIL MARKETING FOR NONPROFITS

Using Email Communications to Build and Strengthen Constituent Relationships

THIS GUIDE INCLUDES:

- *Strategies For Reaching Your Intended Recipients*
- *Benchmarks For Measuring Your Email Success*
- *Practical Tips To Maximize Your Email Marketing Solution*

TABLE OF CONTENTS

ABOUT THIS GUIDE

Getting emails delivered, opened and read is tough enough due to spam filtering technology, which sometimes mistakenly blocks legitimate email. When emails do get through spam filters, constituents with overloaded "inboxes" do their own filtering and decide which messages to read or delete, unopened.

You need effective online tools and techniques for connecting with supporters on a timely basis and delivering the right message to prompt action such as donating, running a volunteer fundraising campaign, joining or renewing membership, advocating on pending legislation, or participating in an event.

This guide was created by a team of experts with the experience of working on Internet projects with 1400+ nonprofit organizations throughout the United States and Canada. It's designed specifically for nonprofit professionals as a handbook about the basics of email marketing. It describes how to build a file of email addresses, get people to sign up to receive email communications, eliminate spam elements from your emails, and execute successful email communications.

For more detailed best practices about online marketing, refer to the *Additional Resources* section at the end of this guide, or visit www.convio.com/our-research

INTRODUCTION TO EMAIL MARKETING

Using email to start and grow relationships with constituents is critical for a nonprofit. Many successful organizations are using email as a cost-effective way to reach out to large volumes of both new and long-time supporters with regular, timely and inspiring information tailored to each person's interests.

Email marketing can help your organization build a loyal, involved support base and driving higher response rates in fundraising, advocacy, marketing, special events and other functions.

▸ Six Reasons Email is Great for Nonprofits

1. ***Email is relatively inexpensive.*** Traditionally, nonprofits have relied heavily on direct mail and telemarketing for communications and appeals. But, the relatively high cost of these methods makes them impractical for the frequent communications needed to grow relationships with supporters. Supplementing traditional communication methods with cost-effective email allows you to communicate more frequently and maintain an ongoing relationship with supporters.
2. ***Email has immediacy.*** Organizations often have an urgent need for donations, or have a small window to raise funds and send out critical information in the wake of a current event. In these cases, there's no time to write, design, print and send a direct mail piece. The immediate nature of email communications allows you to be nimble; you can execute fundraising campaigns and respond to timely issues in a matter of hours.
3. ***Email yields quick results.*** With direct mail, there can be a response lag time of several weeks, or even months. Email, however, typically returns 80 percent of total responses within 48 hours of a mailing. This allows you to evaluate the results of your campaign and quickly adjust your strategy as needed.
4. ***Email gives you new insights.*** Through email, you can track open and click-through rates on both emails and links within emails, allowing you to quickly and easily analyze the effectiveness of your messages and your campaigns to determine your supporters' interests and to ensure you are giving them the information they want.
5. ***Email allows you to send personalized messages.*** Email allows you to easily segment your database and send targeted messages based on individual constituent interests, donation history, or any other field in your database.
6. ***Email allows you to segment and test offers.*** Email allows you to test different messages on different segments of your list quickly and inexpensively, so you can fine-tune your message based on real results before you send to your entire list.

This guide focuses on how to get started with email as the cornerstone of your online marketing plan. With topics ranging from building a file of email addresses to measuring and analyzing email results, it will help you to execute successful email campaigns that get results for your organization.

GETTING STARTED

Building an Email Address File

The first step in any effective online marketing strategy is to build and maintain your email file. The number of email addresses you have on file has a direct impact on your organization's ability to communicate, cultivate, and drive actions from supporters.

The idea of building a usable email file may seem daunting, but you can grow your email file using the following proven tactics:

Gather Email Addresses Offline

Every time you communicate with existing or prospective supporters, you have the opportunity to collect email addresses. Planned interactions such as renewal appeals, membership drives, and event invitations are perfect opportunities to ask for email addresses. Simply add an email address field to all response forms. At events where you will interact with a large number of constituents, set out a newsletter sign-up sheet or offer a giveaway for attendees who drop in a card with their name and email address.

> ### ▸ Best Practice
>
> When collecting email addresses, be sure to let people know how they will be used. Always give people a chance to opt out of receiving email by providing a check box that says something like, "I'd like to receive future mailings".

Remember, when asking constituents for email addresses offline, you should emphasize the benefits they will receive by providing this information. Remind supporters that by communicating with them online, your organization can save money and time, allowing you to more effectively serve your mission. Also emphasize the benefit of timely communication: With email communications, you are better equipped to respond to compelling events and inform them quickly of important news, developments, events and programs.

Gather Email Addresses Online

Your website is the best source for collecting email addresses. Visitors to your website have sought you out because they are interested in your organization. This existing affinity is a powerful incentive for your online visitors to provide you with the information you need to build longer-lasting relationships with them online. Here are three tips for gathering email addresses from your website:

- ***Provide quick online registration.*** Use a web-based registration form that allows site visitors to register easily and quickly. Remember that the more information you request, the less likely people will be to complete the entire form. So, think carefully about the information you want to capture, and minimize the number of required fields — name and email address should suffice. You can always ask for more information about the individual through follow-up communications.
- ***Give site registration prominent placement.*** Dedicate a consistent area of your home page to promoting online registration. Place it in an eye-catching spot above the fold to reflect its importance. You might also use an image or graphic to draw attention to it. Don't forget to promote registration

throughout the rest of your website — consider including a registration link in your page wrapper so the message will be included on every page of your site.

- ***Promote the benefits of online registration.*** Make registration compelling for your site visitors. Create special benefits for registered members, and link to a separate page explaining the perks, such as free email newsletters, or advance notification of upcoming events.

Drive Traffic To Your Website
Maximize traffic to your website by including your URL in offline communications (e.g., ads, brochures, business cards, direct mail, phone hold recordings, or voice messages). Online channels and communications, such as Facebook™ and email newsletters, should link back to your site for more information. The idea is to tell prospects and supporters about the resources available to them on your website and keep the website content current and informative so that visitors will return.

You can also use the free Google Grants program for search engine marketing (SEM). With SEM, you "purchase" keywords to promote visibility. Keep in mind that searchers are pre-qualified prospects; you need to compel them to visit your website by crafting offers that are designed to drive traffic and registrations.

Build Your List Through Viral Marketing
"Forward to a friend" email campaigns, also known as viral marketing, can help you reach new supporters and grow your email file efficiently. In a viral campaign, your organization sends an email with a call-to-action (such as a solicitation for donations, event invitation or action alert) to your existing email file, or to selected groups of constituents in the file. The email also asks recipients to forward the message to friends, relatives and co-workers so they, too, can get involved.

When a new supporter from this previously untapped network of friends clicks through to your website to register and take action, you can ask for their permission to include them in future communications. Imagine the effect of one person sending 10 emails, and then each friend forwarding another 10, and so on. If this happened five times, a single email would reach 100,000 people.

Email greeting cards, or "ecards," are another way to build your email address list through viral marketing. With ecards, your constituents can create their own emails — using your email greeting card template with your organization's branding — to send to their networks of friends and family.

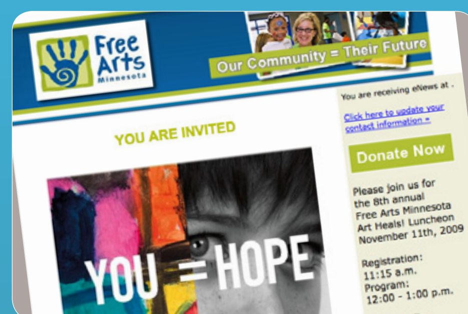
▸ Acquiring Emails: Questions to Ask Yourself

- *Is email acquisition a priority for our organization?*
- *Compared with the number of contact records we have, how many email addresses do we have? How could we get more?*
- *How many different ways do we have to capture email addresses?*
- *Have we really thought about "What's in it for me if I give you my email address?" from the constituent's viewpoint?*
- *What content or programs do we have that could be modified to help capture email addresses?*

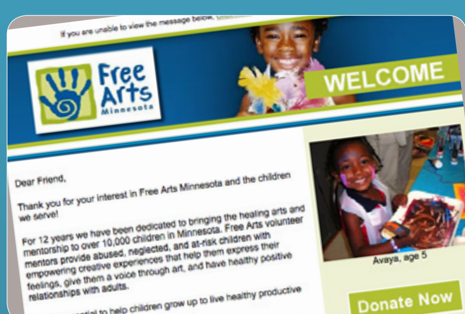
SPOTLIGHT ON
BUILDING A DIALOG

You've undoubtedly heard that communication is the key to successful relationships. Nowhere is this truer than in the world of online fundraising. In addition to maintaining the relationship, regular email communications can also play an important part in growing your email list. Sending good content regularly creates opportunities for your constituents to share it with others, which in turn will drive further awareness of your organization, website visits and new constituents. Here are four effective approaches to build a dialog using email.

eNewsletters *can be monthly, bi-monthly, or even quarterly depending on your organizational resources and available content. The key here is not just to be regular, but to offer high-quality, engaging content. The eNewsletter consists of story excerpts that direct readers to the website for the full story.*



*An **eBlast** is similar in format to the eNewsletter, but contains only a single topic or story excerpt.*



*An **eLetter** is a personal letter from the voice of the organization. It is similar to an eBlast, but is written in the first person, normally by the Executive Director, and usually includes a picture of this person and their digital signature.*

*An **eCard** has a single focus like an eBlast, but with an emphasis on visual design. eCards usually include simple, timely topics like a save the date, an announcement that your annual report is available online, or a Mother's Day card.*

Use List Rentals Or An Email Appending Service (With Caution)
To increase your email list, you can have a third-party list owner cross-promote your organization. They should do so by sending an email with their brand and a link to your website for interested parties to opt in to your email list.

If you have an extensive donor or supporter database, but few current email addresses, consider taking advantage of the growing number of email append services that will take a postal mail address and attempt to find a matching email address. These services will typically provide (for a fee) all email addresses from their database that don't bounce. A cautionary note: This process does not obtain permission for you to add the email addresses to your list. Even if supporters have a relatively strong offline relationship with your organization, they won't necessarily be happy to receive email from you. The safe way to use an append service is by having the service send an email driving people to your website, and obtaining an explicit opt-in from site visitors. This results in a smaller list, but one of higher quality.

Building Constituent Profiles

Data about your supporters is worth its weight in gold. It can help you better understand your constituents and how they like to interact with your organization. Data can be used to recognize trends, compare campaigns, and identify what is (or isn't) working. Armed with this information, you can create effective, customized, targeted email communications that demonstrate an understanding of the relationship your supporter has had — and wants to have — with your organization.

Remember also that your supporters' expectations are high. They expect a personalized experience every time they interact with your organization. They want to feel special among your larger group of supporters.

To deliver truly personalized communications, you need to supplement the basic data (name, email address) you have collected from your constituents with more detailed demographic information, and information about their attitudes, interests and behaviors. Using this advanced profile information, you can create and send messages that target specific groups within your database. This personalized touch can dramatically increase response rates as well as strengthen your supporters' commitment to your organization.

Follow these guidelines to help gather profile information:

- ***Use online surveys.*** A simple online survey can allow you to gather almost any type of information simply by asking constituents to respond. By using an online survey tool, you can automatically add what you learn about them to their profile in your database.
- ***Capture data based on online behavior.*** You can gain valuable insight into your supporter's interests simply by capturing data as they click through your website. By embedding trackable links in content on your website, you can flag a registered visitor's profile with information about their particular interests. If supporters respond to an email invitation for a volunteer fundraising event, for example, you can automatically capture this data and use it to send them future event information, or perhaps a volunteer newsletter.

- ***Integrate offline and online data into a single view.*** If yours is like most nonprofit organizations, you probably already have a significant amount of information about your supporters stored in one (or more) offline databases — and spreadsheets, and scraps of paper. Look into CRM solutions that are built specifically for nonprofits to help you consolidate this information. Convio's Common Ground CRM system, for example, is a complete fundraising and donor management solution that helps you track the details of every relationship in a single database — from prospects, donors, and staff members to volunteers, event participants, and board members.

For more information about integrating your offline and online data into a single view, refer to *Toolbox for the Modern Nonprofit: Donor Management Made Easy* (see *Additional Resources* at the end of this guide).

MAKING SURE YOUR EMAIL GETS THROUGH

Getting emails delivered, opened and read is tough enough due to spam filtering technology, which sometimes mistakenly blocks legitimate email. When emails do get through spam filters, constituents with overloaded "inboxes" do their own filtering and decide which messages to read or delete, unopened. What's a nonprofit to do?

The ugly truth is that there is no way to ensure that 100% of your emails will get through to their intended recipient. But, there are ways to maximize your email delivery. Following are a few things that affect email delivery and the things you can do to avoid common delivery problems.

Recipient Complaints

If recipients report your email as spam to their Internet Service Provider (ISP) or email software provider, your organization's communications may be rejected or diverted to the spam folder. Here are a few tips for keeping your organization's complaint rates low:

- ***Acquire explicit opt-in from all individuals you add to your email list.*** Avoid list building methods that assume a supporter wants to be added to your list because they donated to your organization, participated in an event, or have some offline relationship with your organization. Supporters expect to be asked for their consent before you send them email.
- ***Study where your complaints are coming from*** to identify and avoid problematic list building practices.
- ***Stay "white listed".*** Since nonprofits typically email to "home" rather than "work" addresses, half of a group's typical email file consists of addresses at major ISPs, or consumer providers, such as AOL™, Yahoo!™ and Hotmail™. Check with your email software provider to ensure it has white list relationships, or exemptions from volume filters, with these major providers so your email does not get blocked.

List Hygiene

Keeping your list "clean" is critical to deliverability. If you repeatedly send email to invalid addresses that a recipient's system has hard bounced, delivery barriers will be raised. Some tips:

- ***Review email addresses that are collected offline*** and correct common mistakes, such as misspelling of domain names, prior to import.
- ***Examine your hard bounces on a quarterly basis***, and consider using an email change of address service to recover working addresses for unreachable supporters. The delivery status of an email address should not be reset without evidence that a hard bounce was in error or spam-policy related.

▸ A Word of Caution

Bounced email consumes resources, so Internet Service Providers do not appreciate repeated emails to addresses already identified as bad. They use high bounce rates as an indicator of spam, or unsolicited email.

Supporter Options

Be sure to let supporters choose the types of email communications they want to receive. Follow these best practices:

- ***Provide tools that enable self-serve*** subscription management.
- ***Allow users to maintain profiles*** with their contact data and interest preferences.
- ***Make it easier for subscribers to remove themselves*** from your email list than make spam complaints.
- ***Ensure your "remove me" procedures*** across all touch points are operational.

▸ Quick Tip

Your email marketing software should offer a spam checker so you can check your email communications for any potential spam violations and correct them before sending your email. This capability helps ensure that more of your recipients receive your communications.

When It Comes To Content, Use Common Sense

While it is rare that typical nonprofit content will trigger spam filters, it can occur even when you are sending to a fully qualified, fully opted-in list of highly engaged constituents. Avoid content practices that can impact delivery by following the following best practices:

- ***Use a light, lean style*** with significant chunks of meaningful content (spam filters look for a high ratio of HTML tagging to actual text). Avoid single image email.
- ***Design your email to render well*** even with images suppressed.
- ***Provide a link to the online version*** of your HTML newsletter.
- For quality control, ***test your content*** thoroughly before you send it.

The federal CAN-SPAM Act aims to wipe out illegitimate email practices that threaten the growth and success of the Internet marketplace. While this act relates primarily to commercial, not nonprofit, activities, you should familiarize yourself with it. ***For more information about this act***, visit the Federal Trade Commission site at: http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm

PLANNING EFFECTIVE EMAIL CAMPAIGNS

Any successful direct marketer will tell you that strategic planning is a critical element in the success or failure of a direct mail campaign. The same is true for an email marketing campaign.

You may simply be sending one email message. Or, your campaign may have multiple email messages, with each response triggering a series of subsequent email messages. You might want to include or exclude recipients who responded a certain way from future email messages. A strategic plan will help you organize all of these considerations for a more effective campaign.

Determining Campaign Objectives

As with any marketing campaign, you must understand your objectives before you send an individual email or launch an email campaign. Setting objectives for the email message or email campaign will help you sharpen each message and determine the best approach — from email newsletters and urgent news updates to email fundraising appeals — for your communications. It also will help you to effectively evaluate results and understand your return on investment.

For instance, your goal may be to establish a campaign for ongoing communication with your existing supporters to keep them updated and connected with the organization, and therefore strengthen their loyalty. This campaign might include a monthly email newsletter that lets your constituents know how their support is helping the organization to further its mission.

Establishing a Communication Schedule

As you prepare to execute an email campaign, it's important to consider the frequency with which you will be contacting your constituents. Too-frequent (and too-infrequent) communications can result in deteriorating relationships with supporters.

▸ Did You Know?

In addition to helping you create and send individual emails, your email marketing software should allow you to set up email campaigns. This will allow you to configure multiple emails and audiences in a single campaign, and track all responses within the context of the campaign, versus having to track results for each separate email, and then aggregate those results.

The best approach is to set a schedule that you think makes sense, try it, listen to feedback, and adjust accordingly. Your supporters will let you know by their response if you are contacting them too little or too often. ***Consider these pointers as you develop your communication schedule:***

- ***Synchronize online with offline direct marketing programs.*** Remember that email communication should complement offline communication programs. Time email campaigns to coincide with direct mail delivery. Offer constituents the option to not receive direct mail, if they would rather correspond only by email.
- ***Coordinate within your organization.*** Remember that other individuals and departments within your organization may be planning to use your email address file. It is important to coordinate usage

so that your organization does not flood its supporters' inboxes with multiple email messages.

- ***Pay attention to the day and time of scheduled delivery.*** Most marketers avoid weekends, Mondays and Fridays for delivering email communications. On these days, supporters may be most distracted, and your email could get lost in their email backlogs. Mid-week, early- or mid-morning, and mid-afternoon are generally good times to test in an attempt to drive higher response rates. Don't be afraid to test a variety of schedules, and be sure to carefully track response rates.

▶ Suggestion

The most effective way to ensure you don't overwhelm supporters with too-frequent emails is to ask about their preferences. Consider posing this question on your website registration form, or sending an online survey.

- ***Let relevancy drive frequency.*** The type and relevancy of information you will communicate can help determine your email schedule. For general organizational updates and news, monthly or bi-weekly communications might be most effective. Information that frequently changes (such as volunteer schedules), or that is more urgent, may require that you communicate more often.

Segmenting Your List to Target Specific Audiences

If you have built constituent profiles as a part of your email file, you will be prepared to better target your audience. As with direct mail, you'll improve response rates by segmenting your email file based on factors such as constituent interests, donation history, gender, age, length of membership or any other defining characteristic, and targeting them with specific messages.

CRAFTING AN EMAIL THAT GETS OPENED

Strategic planning and list-building is just the foundation of an effective email marketing campaign. Once these pieces are in place, the following guidelines can help you create a message that will motivate your supporters.

Optimize The Message Envelope

Pay close attention to the information you include in the email's message envelope, as it can be critical to your response rate.

The purpose of your message's subject line is to get the message opened. Your subject line should be no more than 50 to 60 characters in length, and should tell the recipient something about your message. Use short, action-oriented words to draw on emotion.

▸ Did You Know?

Spam filters watch for excessive punctuation and capitalization in email subject lines. To avoid having your message blocked by spam filters, use concise subject lines.

Most people scan their emails to see who messages are from and then prioritize which messages to open. If an email appears to come from an unfamiliar source, your open rates may suffer. Capitalize on the strong affinity supporters have for your nonprofit by putting the organization's name in the "from" line.

Design Your Email To Drive Response

Your message's design and layout can significantly impact response rates:

- ***Send graphically rich emails.*** Using HTML in your email messages allows you to include photos and images as well as control design elements such as fonts and colors. HTML email is visually pleasing, professional looking, and generally easier to read. Plus, it allows you to reinforce your organization's brand by including your logo or other recognizable visual elements in each message.

  However, it's important to remember that some of your supporters may not be able to read HTML messages because of the limits of their particular email provider. Choose email marketing software that supports multi-part email distribution of both HTML and text format messages, which will automatically detect when someone cannot accept a graphical email, or has indicated that he or she prefers to receive text-only messages, and will deliver a text version in its place.
- ***Keep key message points above the fold.*** Most email programs allow users to preview messages without fully opening them. Although your readers may be able to pre-set the size of their viewing window, you can assume that only the top 25 percent of the email will be visible. Make sure you include the most compelling elements of your message and any calls-to-action in this top portion of the email.
- ***Keep your message short.*** Don't overwhelm your message recipients with too much copy. Limit the message to one or two key points and keep your overall message to less than two screen lengths to reduce the amount of scrolling required by readers.
- ***Drive readers to your website.*** One way to keep email messages short is to replace lengthy explanatory text in your message with a short "teaser" followed by a link to your website. This

The highlighted area represents the top 25% of your message that viewers can see within a preview pane. Include the most compelling elements of your message in this top portion of your email.

tactic has the added benefit of allowing you to track the links that are most frequently clicked, which will help you evaluate supporters' interests and the impact of your message. But instead of simply dumping them onto your homepage, send readers directly to a page where they can take action, such as signing up as an advocate, making a donation or registering for an event.

Personalizing Your Message

The power of email marketing lies in the ability to create and develop relationships with your supporters by delivering content that is specific to their interests, motivations, geographic location and other characteristics.

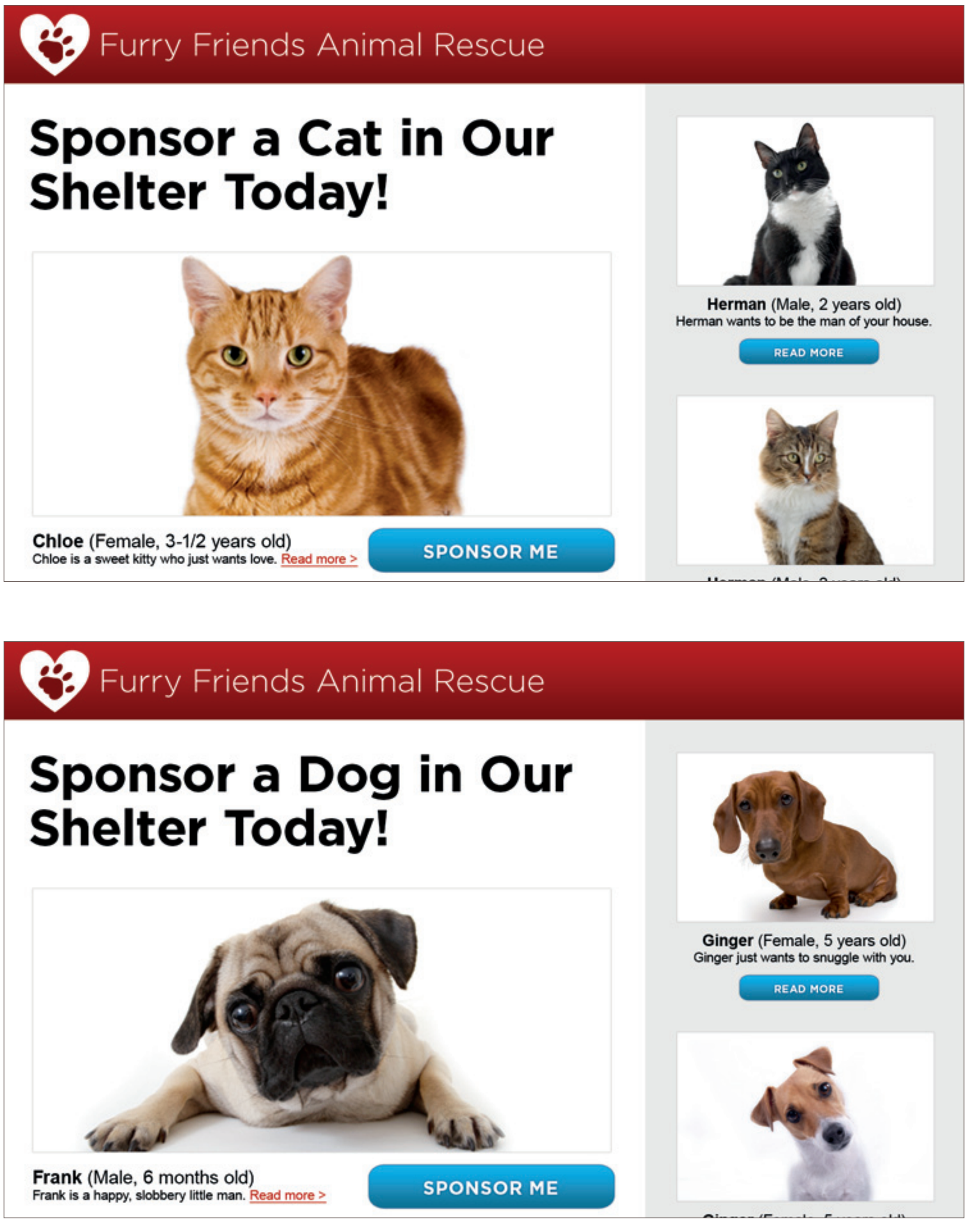
Addressing supporters by name is a simple way to add a personal touch to your email communications, and alone can make a significant impact on response rates. A good email marketing tool makes it easy to insert merge fields into your messages. These merge fields pull any data from your database, allowing you to automatically send a unique version of the email to each constituent.

While selectively displaying personal information is important, the real power of personalization

▸ Did You Know?

Your email marketing software should allow you to easily add content to a single organizational email or email newsletter, delivering local content just to constituents in that area. This can be done by state, ZIP code, affiliate and/or region.

lies in automatically customizing the content a constituent receives in an email message. As with the personalization merge fields that allow you to address each constituent by name, this technique draws from the registration and profile information you have gathered in your database. But in this case, the "conditional content" might be a single sentence, a full paragraph, images, a survey or even unique donation forms. This content is automatically inserted into an email if a constituent meets particular criteria that you have designated. By adding content based on each constituent's interests, your organization will make its communications more relevant, and more valuable.



The best email marketing tools allow you to add personalized, customized content to your emails to match a constituent's interests, based on criteria that have designated.

Testing Your Message

Prior to sending your email out to hundreds or thousands of supporters, be sure to thoroughly test your communication internally. This important process prevents distribution of emails containing costly and/or potentially embarrassing mistakes.

Designate and train a few people within your department or organization, and send test messages to this same group to maintain consistent quality standards. These internal testers should complete the following tests:

- ***Check for display variations.*** Set up test email accounts on a variety of email clients (i.e. Microsoft Outlook™, AOL, Hotmail, and Yahoo!). Have your testers evaluate the look of the email in various email clients so you have an understanding of what your constituents will see.
- ***Check functionality.*** Your testers should check that the various technical components of your campaign work properly. Testers should attempt to mimic the experience your constituents will have when they receive your email. Be sure to click through all links in the email and on any landing pages. Also test the transaction, registration, or other functionality associated with your call-to-action.
- ***Test externally*** to fine-tune the message and check the process. Take advantage of the inherent benefits of the Internet by sending test messages to a sub-set of recipients prior to sending it to your entire email file.
- ***Check for message effectiveness.*** Because the Internet allows you to send messages and receive responses quickly, you can compare response rates of different messages and subject lines, and then refine your email message before sending it to the entire constituent base — ensuring the maximum response for each email campaign.
- ***Check your campaign process.*** In addition to testing the effectiveness of the email itself, it is important to send a test message to ensure you are prepared to handle responses — particularly if you are sending a message to several thousand constituents or more. Is your telemarketing team staffed appropriately to handle the volume of responses? Is your marketing staff prepared to reply to the email messages that come back from your constituents? Sending a test message to a small percentage of your target audience will help you to identify any holes in your process before sending to the entire list.

▸ A/B Test Groups

Your email marketing software should allow you to send two or more different messages to a percentage of your target audience to test the effectiveness of each message (often called A/B split testing), and then send the most effective message to the remainder of the audience without sending to the test group again.

TRACKING AND MEASURING RESULTS

The relative success of an email marketing campaign or single email communication can be judged on a variety of criteria, depending on your goals and objectives. As you learn more about your constituents' online preferences, polish your message, and develop benchmarks for successful email marketing campaigns, you'll be able to fine-tune your strategy.

▸ Helpful Benchmarks to Evaluate your Results

Open rate. This is the percentage of recipients who open (view) your message divided by the number of messages delivered. Though not indicative the number of people who actually read your message, this measure can give you a good idea of your subject line effectiveness and helps you to track trends. A good open rate for nonprofit email appeals is around 20 percent, while a good open rate for an email newsletter is slightly higher — around 22 percent.

Click-through rate (CTR). Calculates the percentage of recipients who click on links within the body of your email. CTR indicates the effectiveness of the text and graphics in your email message, as well as the level of interest in your campaign or organization. Your email marketing tool should allow you to determine the individual CTR for each link as well as an aggregate CTR for the message as a whole. A good click-through rate for email appeals is 2 to 3 percent, while a good CTR for email newsletters is 3.5 to 4 percent.

Response rate. Response rate measures the percentage of recipients who take some type of action—such as completing a survey, signing a petition or making a donation—after clicking through to your website. The response rate can be influenced by many factors, including the mix of prospects and active donors in the recipient list, the degree to which the list is composed of organically acquired versus appended emails, and the effectiveness of the email appeal and landing page/donation form. A good response rate for an email appeal is around .15 to .16 percent.

Opt-out (or unsubscribe) rate. If subscribers do not continue to find content compelling, they may choose to unsubscribe, or "opt out" of receiving future email communications from your organization. Your email marketing tool should allow you to include an unsubscribe link at the bottom of your message, and automatically process opt-outs. Increases in your unsubscribe rate can be an indicator of over-frequent or inappropriate communications. Your opt-out rate should be at 0.1 to 0.2 percent.

Forward rate. Another measure of success is the frequency with which supporters forward messages to their family and friends, and whether those additional recipients click through.

For more information about metrics for email list growth and email appeals refer to the *Convio Online Marketing Nonprofit Benchmark Index Study* (see *Additional Resources* at the end of this guide).

HOW CONVIO CAN HELP YOU

Convio provides software and services that help nonprofits more effectively attract, engage and cultivate supporters. As a web-based platform, Convio is a cost effective solution that will grow with your organization and can integrate with other systems to extend your online reach.

Web-Based Software Suite

- Fundraising
- Donor Database & Management
- Events
- Peer-to-Peer Fundraising & Events
- eCommerce
- Web Content Management
- Advocacy
- Email Marketing

Strategic and Technical Services

- Strategy Consulting
- Campaign Management
- User Experience & Research
- Analytics
- Website Design Services
- Technical Design & Integration
- Custom Development
- Training & Support

WHY CONVIO IS DIFFERENT

Passion

Our team is passionate about helping nonprofits further their missions and achieve real results. Over 75% of our client services staff has worked in the nonprofit sector. Meet our team and see examples of our work with clients at www.convio.com/portfolio.

Trusted Strategic Advisor

Convio is the preferred technology and services partner for over 1,300 nonprofits of all sizes—including over half of the top 50 charities—helping them to achieve tangible results through:

- Database Management & Segmentation
- List Building & Donor Acquisition
- Advocacy & Outreach
- Fundraising
- Event Participation & Fundraising
- Website Engagement & Conversion
- Online & Multi-Channel Strategies
- Training & Support

Track Record of Innovation & Results

We're a pioneer for online and integrated marketing for nonprofits. Here are just a few examples:

- ***Industry Benchmarks***—launched the industry's first benchmark study which we publish annually
- ***User Engagement Pathways***—created the concept of defining clear communications paths via email and website to increase engagement and conversions and build this into our product
- ***Accessibility***—partnered with Easter Seals to develop a first-time program to offer accessible technology, job training and employment opportunities for people with disabilities
- ***Convio Go!™***— launched the industry's first affordable, guided fundraising program resulting in a return of $3 for every $1 spent
- ***Driving Results***—In 2009, Convio helped nonprofits process: $921 million in online donations, 51.5 million advocacy calls to action, and 3.8 billion emails (95% delivery rate)

ADDITIONAL RESOURCES

Convio Research

- ***The Next Generation of American Giving***, http://convio.com/nextgeneration
- ***The Convio Online Nonprofit Benchmark™ Study***, http://www.convio.com/benchmark
- ***The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors***, http://convio.com/wiredwealthy

Convio Best Practice Guides

- ***Using the Internet to Raise Funds and Build Donor Relationships***, http://www.convio.com/fundraising
- ***Nonprofit Website Fundamentals***, http://www.convio.com/websiteguide
- ***Toolbox for the Modern Nonprofit: Donor Management Made Easy***, http://convio.com/donormgmtguide
- ***Going Social: Tapping into Social Media for Nonprofit Success***, http://www.coonvio.com/socialmedia
- ***Holiday Giving Guide***, http://www.convio.com/endofyeargiving

More Convio Resources

- ***On-Demand Webinars***, http://www.convio.com/webinars
- ***Quick Tour Videos***, http://www.convio.com/quicktour
- ***Sign up for our newsletter***: *Convio Connection*, a free bimonthly newsletter for nonprofits on how to attract constituents, drive action, and build loyalty through online relationship management. http://www.convio.com/newsletter

ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.

convio®
MOVE PEOPLE™

MOVES MANAGEMENT™ MADE EASY

How CRM Puts You In Sync With Your Major Donors

In today's tough economy, successfully competing for donor dollars requires cultivating strong relationships with your major giving prospects.

Moves Management™ is the set of processes nonprofits rely on to develop these constituent relationships and move them toward major giving. But simply adopting Moves Management as a strategy isn't enough. Its full potential is only realized when supported by tools that help you identify and foster the personal relationships essential to giving.

The depth and progress of your donor relationships can be significantly impacted by the efficiency and effectiveness of your fundraising tools. If you use Moves Management, Constituent Relationship Management (CRM) is the technology tool you'll need to manage those relationships. CRM goes beyond the capabilities of a donor database, working hand in hand with your organization's major gift processes to help you nurture your best prospects and move the giving process along in a way that works best for you.

Major gifts are a priority for every nonprofit, large or small. Every organization has its own approach to cultivating constituents along the continuum toward major donations.

Whatever your approach to Moves Management, the challenge probably isn't tracking the gifts once they've been given/received; it's identifying the best prospects – weeding out those with little potential and spotlighting the promising ones. These are the relationships that have the potential to result in a major gift and a deeper involvement afterwards (such as more giving, planned giving, willingness to solicit others on your behalf, participation on your board, leading capital campaigns, etc.). Having the ability to consistently identify and cultivate the most promising prospects enables your staff to nurture relationships in a way that's tactful, timely and efficient.

IF MOVES MANAGEMENT IS THE STRATEGY, CRM IS THE TOOL.

It's important to have a Moves Management approach tailored to your organization and constituents. It's also important to know that there is technology that can help you streamline your processes and save staff time and frustration. While a donor database helps manage donors, a constituent relationship management system (CRM) helps manage relationships throughout your organization while quickly and clearly identifying prospects to focus on for giving potential.

CRM solutions can even replace completely or connect seamlessly with the other programs and applications you use on a daily basis, giving you a total 360-degree view of your constituents.

CRM helps you connect more completely to your donors by giving you a full picture of their involvement with your organization, their communications preferences, and their relationships. It also supports your organization's Moves Management protocol – automating the processes you're already using and delivering meaningful reports for measurable goals – without requiring you to change your processes to fit the software.

Keith Heller
Principal
Heller Consulting

HELLER CONSULTING
your fundraising technology team

"You can only effectively carry so many prospects in your portfolio. Pursuing the wrong ones—those who might not have the financial capacity, or simply aren't very engaged with your organization—is costly. A good CRM system helps you recognize relationships you can stop pursuing, saving you valuable time and helping you avoid wasted effort. More importantly, a CRM system prevents important opportunities from falling through the cracks. It helps you identify those hidden but invaluable prospects in your portfolio that have the greatest affinity for your organization and the financial capacity to make significant contributions. CRM supports smarter, more effective fundraising."

CRM FITS YOUR MOVES MANAGEMENT PROCESS, AND HELPS YOU IMPROVE EACH STEP.

There's no one size fits all answer for how to engage in Moves Management. Developing a successful strategy requires flexibility and staff adoption, both in terms of process and technology. But one thing's for sure: your success is limited if you're forced to track relationships the way a software vendor has dictated in their product. If you're having to copy and paste emails to share with others, or use an ad hoc process that involves a lot of Excel spreadsheets, for example, the result will be missed opportunities or, at the very least, non-coordinated communication to major donors and prospects.

There's no one size fits all answer for how to engage in Moves Management. Developing a successful strategy requires flexibility and staff adoption, both in terms of process and technology.

Oftentimes, major gifts officers totally abandon the core database because it is too unwieldy or inconvenient for them (for instance, most of these staff members are constantly on the go and live in their email inboxes and mobile devices – not a database tied to their desk). At the same time, in leaving that database behind they miss out on the latest information they need, such as new gifts received, conversations that others have had with the prospect, and other ways the prospect has interacted with the organization (volunteering, events, petitions, phone inquiries, etc.). Without summary reporting, pipelines, collaboration, and tracking the history of their conversations, they're often partially blind to how donors are involved with the organization. In the end, part of the development team is using one system, and the major donor team is using another while opportunities are lost due to lack of coordination and clear communication. Avoid this scenario: work with an integrated CRM that includes donor management features instead of donor database software alone.

The best part of a modern CRM is that it can adapt to your Moves Management process (the one you already have in place). It fits into your daily activities, becoming a native and necessary part of how you work on a daily basis. It enables collaboration. It's flexible to match the strategy you're using today and yet able to evolve as your strategy changes. It's convenient, can be integrated with products like Microsoft Outlook™, and provides anytime, anywhere access from your web browser and smart phone. As a result, it helps you cultivate donors more effectively through better tracking, quicker response time to your constituents, and a better view of your constituents' relationships and activities.

CRM HELPS YOU DEVELOP STRONGER RELATIONSHIPS THAT LEAD TO LARGER GIFTS.

A CRM enables a truer understanding of how your constituents are engaged with your organization, and minimizes the tedious task of keying information into the database.

For example:

- If a prospective major donor gives online, you need to have that information quickly and with accuracy. You can't afford to wait a week or more for the external data source to update your database.
- If a prospective major donor has an email exchange with your executive director, you need to see the conversation – integration with email tools like Outlook is critical here.
- If a prospective major donor signs a petition on your website the night before your meeting, you need to know before you speak with them the next morning. Access your database remotely through a dashboard on your iPhone, browser, or receive reports via email.
- If a prospective major donor speaks with another staff member about an upcoming volunteer opportunity, you need to have access to this information so that you're aware of their interest in your programs.
- If a prospective major donor is listed on Facebook, LinkedIn, or other social or professional networking sites, your CRM can inform you of this so you can friend them and extend your relationship online.

These are just a few examples of the information you'll have quick access to with a CRM – without having to dig through sticky notes, Excel files, or multiple programs (not to mention departments).

Access major donor reports on a personalized dashboard anytime and anywhere there's Internet access.

Ultimately, Moves Management is about staff nurturing donor relationships. Methods vary from organization to organization. Some organizations favor a formal approach with detailed procedures and defined stages. For others, the process is informal. Often, not all steps along the way are recorded and not all procedures are pre-planned. You need a system that's flexible and that supports all components of Moves Management – from prospecting to cultivation to solicitation to stewardship. CRM can make all of these much easier on your staff and support more personal relationships with your constituents and prospects.

PROSPECTING

Successful prospecting (collecting information about your constituents to help identify potential major donors) requires you to be able to see all the ways individuals have engaged with your organization, from email subscription to personal communications, and give you detailed demographics and, when available, financial information. When a constituent becomes more engaged with your organization, their relationship "moves" or evolves into a more loyal commitment.

An integrated CRM captures all interactions from all staff and all channels for all constituents – in one place. Because you can track all constituents with a CRM (not just current donors) and all types of interactions, you're able to quickly identify prospective major donors based on their prior involvement and inclination to engage. Not only does this minimize data entry for your staff and save valuable time, it gives you better access to your constituents. Here's how:

First, CRM will assist you in tracking and engaging the right prospects. The system can help you identify, for example, the five major donor prospects it's critical you call this week; it can also help you decide when it's time to stop pursuing a relationship, and when you should simply be patient.

The "right" prospects for major gifts are usually based on two criteria:

1. **Ability to Give**
   Who has the financial capacity? A good CRM can track all giving history and will store wealth-screening information simply and provide easy reporting to show you who these people are.

2. **Affinity**
   How connected do they feel to your organization? CRM is uniquely suited to answer this critical question. With a full view of the many ways someone is involved with your organization, you'll be better able to identify the most likely prospects. Analyzing giving history simply isn't enough. CRM can tell you: Who attends programmatic events? Who volunteers? Who's made non-financial contributions as well as monetary gifts? Who has visited your website? In essence, who has participated in your mission and how much?

The number of "touches" a person has had with your organization, and the nature of those touches, is a strong indicator of their connection and commitment. CRM will analyze this data and identify the likelihood of a major gift – even a planned gift that you might otherwise miss. Contrary to conventional wisdom, most planned gifts don't come from major donors. The majority come from donors who have consistently given smaller gifts over many years and participated with an organization in multiple ways – as volunteers, as advocates, as beneficiaries of the mission. Who are these folks? CRM can help you find and cultivate them now.

Once the right prospects have been identified, you need to have the appropriate person contact them. CRM's robust relationship features can show you who is connected to your prospect within your organization. It may not be a gift officer. It could be a board member, an employee, a business colleague in the broader community, or someone from your program staff who has had an interaction with them (e.g., the head of the department where they volunteer). That contact might not ask them for a gift but will play a key role in the solicitation of a gift.

CRM then helps your gift officers take those relationships to a more dynamic level. For instance, you can "friend" your supporters on Facebook, LinkedIn and other social networking sites and communicate with them in the method they prefer. Because CRM systems often integrate seamlessly with email programs such as Outlook, you can record these conversations in your database easily without putting an additional burden on your staff to track every detail.

According to a groundbreaking report by Convio, *The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors*, which looked into the online habits and behaviors of major and mid-level donors, 80% of donors have given online. As your donors become more comfortable giving online, a CRM can help you use the Internet to support traditional major giving efforts.

For more information on how, download:

The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors.

In the Prospecting stage of Moves Management, CRM enables you to:

- Track all "moves" a donor makes with the organization and increase the effectiveness of each solicitation
- Identify "the right" prospects and who the best contact is
- Assign specific tasks to staff to help keep a donor moving through the stages
- Set goals and benchmarks
- Deliver meaningful reports that are tied to measurable goals

CULTIVATION & SOLICITATION

Once you've identified your prospects, CRM can keep you on task by automating the requisite assignments and notifications as you move a donor through the lifecycle of a gift. This includes all stages from cultivation to solicitation to stewardship of the gift.

Throughout the gift lifecycle, having a CRM helps you:

- Keep tasks within your Moves Management process tied to concrete and measurable goals
- Keep your strategy flexible, changing in response to donor and organization needs
- Stay informed with reports and dashboards
- Keep critical tasks top of mind by presenting reminders within the CRM and Outlook (or whichever task business applications you use)
- Track goals, pipelines and benchmarks

For many organizations, within each stage are a series of tasks assigned across your staff team. For example, in the cultivation stage a plan must be created, there's research to be completed, demographic details are double-checked, and relationships must be analyzed. Then comes solicitation, which has its own series of tasks, and so on through the full gift lifecycle.

CRM can automate much of this process, assigning relevant tasks with the appropriate timeframes as the relationship moves from one stage to the next, based on your organization's predefined process. Here's an overview of how CRM supports you throughout the process of major gifts cultivation.

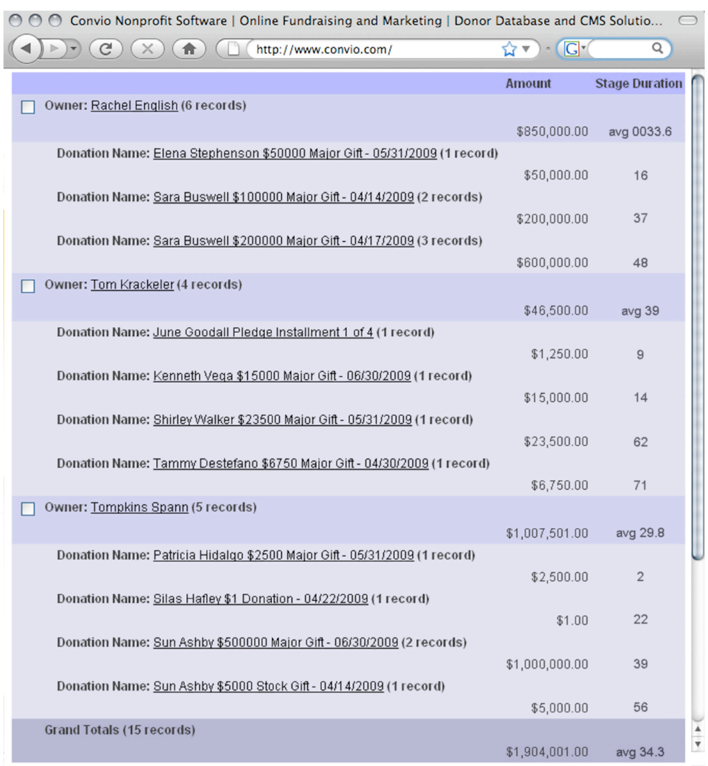
1. Supports Multi-Stage Gift Management

CRM allows for better follow-through. Automatic workflows and task assignments mean no lost time or contact opportunities slipping through the cracks.

When contact is made or a task is completed, the system will tickle your fundraisers to execute the next appropriate move. It will also keep other colleagues informed – your development director, the executive director, the board member who may be supporting the solicitation effort, perhaps the planned giving officer if they are soliciting the prospect in parallel, and the administrative assistant who will be carrying out some of the tasks in the cultivation (e.g. sending out informational packets, arranging for tours, etc). And all this is automated, so the major gifts officer doesn't have to remember to keep all the appropriate people in the loop – the CRM does that for them so they can stay focused on fundraising.

2. Helps You Collaborate And Learn What's Working

Sometimes it's more appropriate and useful to measure performance based on activity, not just results. You may want to set measurable goals that aren't just dollars. If a development director wants to know, "How are my major gifts officers spending their time?" a CRM can help answer that question by providing activity reporting, such as number of calls made to new prospects, number of "touches" with active prospects, number of proposals submitted, or number of site tours, within a requested period.



	Amount	Stage Duration
Owner: Rachel English (6 records)	$850,000.00	avg 0033.6
Donation Name: Elena Stephenson $50000 Major Gift - 05/31/2009 (1 record)	$50,000.00	16
Donation Name: Sara Buswell $100000 Major Gift - 04/14/2009 (2 records)	$200,000.00	37
Donation Name: Sara Buswell $200000 Major Gift - 04/17/2009 (3 records)	$600,000.00	48
Owner: Tom Krackeler (4 records)	$46,500.00	avg 39
Donation Name: June Goodall Pledge Installment 1 of 4 (1 record)	$1,250.00	9
Donation Name: Kenneth Vega $15000 Major Gift - 06/30/2009 (1 record)	$15,000.00	14
Donation Name: Shirley Walker $23500 Major Gift - 05/31/2009 (1 record)	$23,500.00	62
Donation Name: Tammy Destefano $6750 Major Gift - 04/30/2009 (1 record)	$6,750.00	71
Owner: Tompkins Spann (5 records)	$1,007,501.00	avg 29.8
Donation Name: Patricia Hidalgo $2500 Major Gift - 05/31/2009 (1 record)	$2,500.00	2
Donation Name: Silas Hafley $1 Donation - 04/22/2009 (1 record)	$1.00	22
Donation Name: Sun Ashby $500000 Major Gift - 06/30/2009 (2 records)	$1,000,000.00	39
Donation Name: Sun Ashby $5000 Stock Gift - 04/14/2009 (1 record)	$5,000.00	56
Grand Totals (15 records)	$1,904,001.00	avg 34.3

Additionally, these reports can help set team benchmarks and highlight the stages of your Moves Management process that need improving. A report can tell you, for instance, which of your development officers is most effective at securing gifts, so your team can learn from her process. Report on the average days it takes your officer to close a gift, even the average days at each stage. You can compare these figures vs. statistics for the other officers and share the individual "best practices" of those who have honed their techniques in specific areas.

Benchmark Your Performance: Running a simple report can tell you how long outstanding gifts have been in their current stage.

3. Keeps Your Constituents Moving Steadily Along The Relationship Continuum

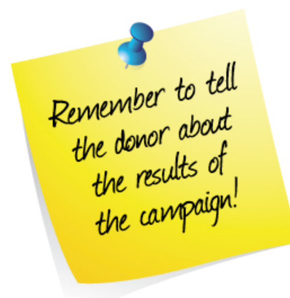
CRM's robust reporting enables you to periodically review your active prospect pool for gifts that are moving too slowly through the process, so your staff can concentrate on potentially more promising prospects.

Without CRM, this kind of strategic approach may be based on anecdotal, subjective information ("Sure seems like we've been talking to this prospect for a long time with no results…maybe we should move on.") With the historical data a CRM report can provide, and its powerful analytical tools, you may be surprised at the viability of this prospect—or confirm your suspicions. But you will now have the statistics to back it up.

STEWARDSHIP

Moves Management doesn't end when the gift is received. The key to successfully sustaining a major gift program is good stewardship. Providing frequent updates to your donors delivers the "return" on their investment – and it's the final piece that brings the relationship with major donors back around the continuum to repeat giving. CRM helps here as well. By automating the assignment of follow-up tasks, tracking relationship-building activities, and delivering enlightening reports that highlight where your staff should spend their time, CRM can help systematize your stewardship process and ensure no steps are overlooked.

While some larger organizations have staff dedicated to gift stewardship, smaller organizations with limited resources will also benefit from the efficiency CRM brings to the process. A well defined stewardship process, once implemented in CRM, takes the concept of sticky notes to a whole new level, placing all of your reminders and "to do's" into an automated series of tasks that provide timely, relevant and efficient guidance to nurture those relationships that you worked so hard to cultivate.



IN CONCLUSION: CRM SIMPLIFIES, INTEGRATES, AND IMPROVES MOVES MANAGEMENT FOR YOUR ORGANIZATION.

CRM takes the set of steps you use in major gifts fundraising and turns it into a true Moves Management process that becomes part of your daily routine. The system enables you to perform each step better and faster, helping you uncover new insights into donor relationships, performance, reporting, and automating tasks wherever possible so that you save staff time and cultivate stronger constituent relationships.

With CRM to guide you through prospecting and cultivation, you'll find you have a more comprehensive view of your donor relationships and how they are working to serve your mission. You'll be more connected to your donors, tuned into their activities and preferences and poised to deepen the relationship. Working as a team and managing your staff becomes easier as goal-setting, pipelines, benchmarks, best practices and activity reports are only a few clicks away. And finally, your gift officers will be able to use the system to access the information they need while working on the go in the style they prefer.

Whether your organization is large, medium or small, CRM will reflect your major gifts protocols while making the whole process more thorough and efficient, so that you can focus on what you do best – building relationships with your major donors.

CONVIO'S COMMON GROUND: MOVES MANAGEMENT FEATURES THAT MAKE THE DIFFERENCE

There's a lot of donor database software out there claiming to help you with Moves Management, but as we've discussed, a donor database provides only a limited view of your constituents. Here are the features that separate Common Ground from the pack of donor database options.

Relationship Tracking

Build a network of contacts and leverage known linkages to further relationships with Common Ground. Tracking all known relationships, whether between individuals or related organizations becomes critical to finding as many possible touch points and linkages to the target as possible to further the probability of getting the gift.

Email Integration

No matter what email service you're using, Common Ground can capture key correspondence at the contact level without extra hassle, allowing all staff involved in cultivating a relationship to remain "in the loop."

Social Network Integration

More and more donors have adopted Facebook, LinkedIn and similar popular tools. With third-party integration services from partners like Rapleaf, you can monitor your key constituent relationships in social networks and research affiliations to increase your results.

Gift Stage Tracking

Track the full lifecycle of each gift and customize each stage to match your process with Common Ground. This allows your team to define a methodology for gift cultivation and pipeline reporting and monitor progress through a series of defined stages.

Dashboard Reports

Follow the metrics and KPIs that are important to you via personal dashboards. Each staff person—whether they are a major gift officer or executive director—can create their own graphic reporting dashboard and automatically receive updates via email on a scheduled basis. With dashboard reporting you can monitor results without even logging in to the database.

Custom Reports

No two organizations are alike and so limited canned reports simply cannot deliver the analysis and detail each nonprofit needs. With Common Ground's step-by-step custom reports, your non-technical staff can get what they need from the database to inform their strategies in real-time without technical help.

Mobile Device Access

Whether using your iPhone, Blackberry, or Windows Mobile device, your team can look up contact details, gift history and more on the go. Be alerted if the target buys a table at the gala or other actions that you may want to know, just in time for you to walk in and request the gift.

Custom Fields

Easily create custom fields on contact and household records allowing you to store data that helps you better understand your constituents and identify prospective donors. These fields allow each organization to apply the best approach – or your approach (versus a software vendor's approach). The flexibility to add fields, change labels, etc. helps Common Ground fit into your strategy.

Automated Workflow

Automatically assign tasks and trigger email notifications based on changes in the database. Workflows can be used to notify a major gift officer or executive director when a prospective donor record has been modified in some way. They can also be notified when a major gift stage shifts or when efforts have stalled. Every field in the database can trigger a workflow, so no matter what process you define, Common Ground works with you.

READY TO SEE CRM IN ACTION?

The following scenarios illustrate how CRM can power the Moves Management processes of small, medium, and large organizations. These organizations use Convio's Common Ground as their Moves Management CRM solution to support their efforts at every step toward prospecting and cultivating relationships with major donors.

Small Organization – "A Helping Hand For Animals"

A Helping Hand for Animals has just begun to implement a Moves Management process. They plan to evolve this process over time, once they have more experience testing what works and what's feasible. They know that their CRM can support a far more complex implementation, but they are starting simple. Here's a story about how they operate Moves Management using Convio's CRM, Common Ground, as their technology tool.

1. Janice discovered that Frida Fortunate, a well-known local author, has subscribed to their email list and recently made a donation online. She discovered this by viewing a report of recent donations that had been automatically emailed to her the night before.
2. Janice calls Frida to personally thank her for the gift and logs her call notes in the CRM.
3. Before she contacts Frida, Janice performs a few tasks and adds her findings to the database. Here's what she does:
   - Janice emails her board to find out if anyone has a personal relationship with Frida. It turns out board member Betty knows Frida through another friend, so Janice tracks these relationships in Common Ground.
   - Janice visits Wikipedia to gather some demographic details about Frida, notes her birthday in the database, and sets up a recurring event with a reminder to notify her each year one week before her birthday.
   - Janice also learns that Frida was cited in the annual report of a partner organization, so Janice takes note of the contribution amount and sets her target ask appropriately.
4. Janice is now able to leverage existing relationships to be introduced and cultivate a relationship with Frida.
5. Janice has decided to solicit Frida for a gift to her organization's capital campaign.
6. As the relationship evolves, Janice makes sure to record all notable interactions in the database, especially emails exchanged by using the Outlook integration feature that makes it easy to capture emails without any extra effort on her part.

7. Since Janice is developing multiple similar prospective donors, she's able to monitor all activity of changes made by other staff by receiving a weekly scheduled report that lists any changes or activities recorded on each prospective major donor.

Medium Organization – "Charity Corps"

Over the years, Charity Corps has been able to compile a substantial amount of information on its constituents; however, the data is not currently helping to inform their major gifts program, so they have decided to use their CRM to highlight prospective donors. Here's what they do:

1. William has a meeting with his major gifts team tomorrow to identify prospective donors. In preparation he creates one report that informs his team on the best potential donors; this report indicates their donation capacity, readiness and inclination to give.
2. To determine capacity, he first creates a report that details all existing donors who have given > 5x in their lifetime with a total lifetime amount greater than $500.
3. For readiness, he then excludes all donors who have recently given more than $1000 in the past 6 months.
4. And for inclination, he limits the results to only those individuals who have participated in at least one of several campaigns in the last 12 months.
5. Armed with this intel, William is able to create a report that details the top prospects within his existing database and conduct a productive meeting with his team.
6. In the meeting the team assigns values to each of the top prospects for inclination, readiness and capacity, and William imports these values in to the database, appending the information to each prospect's record respectively.
7. The next step for William is to delegate some research tasks in the database to different team members and monitor their progress week by week using a dashboard report.

Large Organization – "Unity International"

Unity International has a team of full and part-time major gift officers who are measured to a quota and must forecast donation revenue using pipeline reporting. For this large team it is important that management is able to keep a pulse on their efforts and analyze trends across the team to help improve results. To do this, Unity International has implemented the custom forecasting features of Common Ground.

These features allow the management team to:

1. Assign quotas on a fiscal quarter basis to individual team members by analyzing prior term results
2. Monitor pipeline progress on gift opportunities with confident probability

3. Evaluate the stage duration of gifts at a macro level and provide additional support to move gifts from one stage to another

These features allow team members to:

1. Easily monitor all activities, tasks, correspondence and probability at an individual gift level while aggregating statistics for their own analysis
2. Override default stage probability ratings on an individual gift based on personal knowledge of the situation
3. Receive daily or weekly pipeline dashboard reports showing progress and outstanding tasks

About Heller Consulting

Heller Consulting helps fundraising professionals achieve greater results with less effort by optimizing their use of fundraising technology and streamlining development operations for maximum efficiency and efficacy. Since 1996, Heller Consulting has served over 600 non-profit clients with more than 1,200 projects. Their clients include hospital foundations, universities, human & social service agencies, independent schools, advocacy organizations and cultural institutions across the country.

Special thanks to Keith Heller (Principal, Heller Consulting) for his contributions to this guide.

About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.