

# CASE STUDY

*What Works: A Research Foundation  
"Goes Geek"  
For Younger Donors*



# SMALL NONPROFITS DREAM BIG

**What Works:** *OMRF opens the door to a younger generation of donors, unlocks the secret to incentive campaigns, builds their email list, and recruits a fan base of pro-science supporters ready and willing to spread the word that “research is cool.”*

Oklahoma Medical Research Foundation (OMRF) is an independent, nonprofit biomedical research institute dedicated to developing more effective treatments for human diseases. Chartered in 1946, its scientists focus on such critical, life-saving research areas as Alzheimer’s disease, cancer, lupus and cardiovascular disease.

As one of the nation’s oldest and most respected nonprofit biomedical research institutes, OMRF always has a finger on the pulse of its existing supporters, but needed a way to build its housefile of younger donors to meet its fundraising and marketing goals.

OMRF joined Convio Go!™—a guided program for online fundraising success—to get help balancing the many variables that determine success in establishing new donor relationships: *How often should we communicate? Are we saying too much? Too little? What’s the best way to approach someone who’s never been in contact with our organization? What tools do we need? What channels should we use? What should our message be?*

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“The Convio Go! Program gave us a running start and the confidence we needed to expand our marketing efforts both online and offline.”

—Jenny Lee, *Creative Director, Oklahoma Medical Research Foundation*

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## THE GOAL

OMRF's goal was to increase awareness about OMRF and attract new supporters who identify with the life-saving medical research and scientific work they do. Specifically, they wanted to recruit fans of science and to especially reach younger generations of potential donors who could act as ambassadors and garner further community support for their cause.

They would measure their success by how much their efforts grew their email list, uncovered key influencers and achieved fundraising results.

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## THE CHALLENGES

The specific challenges OMRF faced were:

- With a small staff of 3, resources and budgets were tight
- Had a small email list, comprised mainly of older, loyal supporters
- Previously sent long, text-heavy email messages using technical language that—quite literally—meant only neurosurgeons could understand the benefit of their work
- Used a paper-based, time consuming method to manually process online donations
- Had not been collecting email addresses from online donors

This case study outlines how OMRF worked with the Convio Go! team to establish a successful relationship pathway with a specific donor segment, which tools and techniques are useful for outreach to a new supporter base, and how to shepherd those constituents through the communication process from every touch point of your organization.



## GETTING YOUR CAMPAIGN OFF TO THE RIGHT START

*Select the right type of campaign structure to meet your goals*

With limited funds and a desire to reach a wide target of potential supporters, OMRF opted for an incentive campaign—specifically, a giveaway. An incentive or giveaway campaign involves offering something related to your mission in exchange for a supporter’s contact information. The best incentives or giveaways promote your brand and are related to your mission. The goal is to increase awareness about your organization and attract potential supporters who identify with the work you do.

With the help of their Convio Go! program consultants, OMRF developed a creative and cool/irreverent incentive campaign that was hard to ignore. This was a multi-touch email campaign that not only got the attention of its recipients using humor, but also allowed supporters to participate by spreading the word on behalf of the organization.

OMRF kicked off the campaign by emailing their existing supporters with a Tell-a-Friend-eCard about the chance to win a Geek Pack (including protective goggles and personalized lab coat). This pass-it-on eCard encouraged recipients to register to win. Completion of an online registration form on the OMRF website captured the recipient’s email address and other relevant information required in order to be eligible for the Geek Pack.

**OMRF** geek...it's the new chic

You already love OMRF. And we love you back. So much that we're ready to make you an honorary scientist. Every time you tell a friend about OMRF using one of our eCards, your name will be entered in a drawing for a free Geek Pack.

Our Geek Pack includes:

- A genuine, unused, biohazard-free lab coat—embroidered with your name!
- The latest in personal protective eyewear, because we practice safe science, y'all.
- And the finishing touch—a pair of second-skin lab gloves to protect your digits from harmful stuff. And of course, you better believe they make that nice, yeah-I'm-a-doctor snappin' sound when you tug 'em on. Extra cool.

When you don your Smarty Pants duds, your IQ will gain an instant 20 points. We guarantee it! Plus, you'll be helping spread the word that research is cool.

So please, pass it on! Don't forget to tell your fellow geeks. Be a Smarty Pants and get your name in the game.

**The Deadline to Enter is Wednesday, June 24th!**

   YouTube

**Geek is the new chic.  
Support OMRF and win a Geek Pack!**

**Win a Geek Pack**  
Click here to Sign Up!

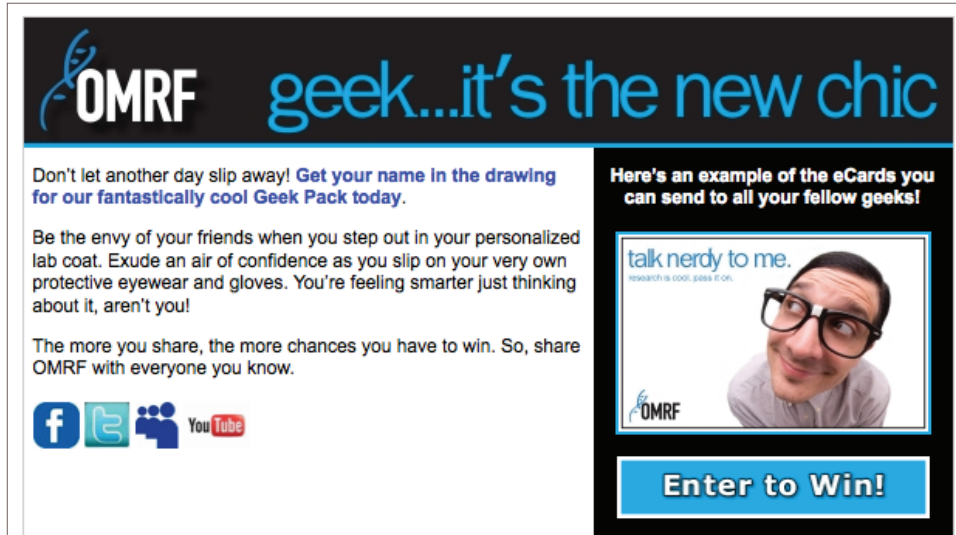
**Enter to Win!**

*Tell-A-Friend Email: Campaign Kick-Off*

## 2 KEEPING THE CAMPAIGN ALIVE

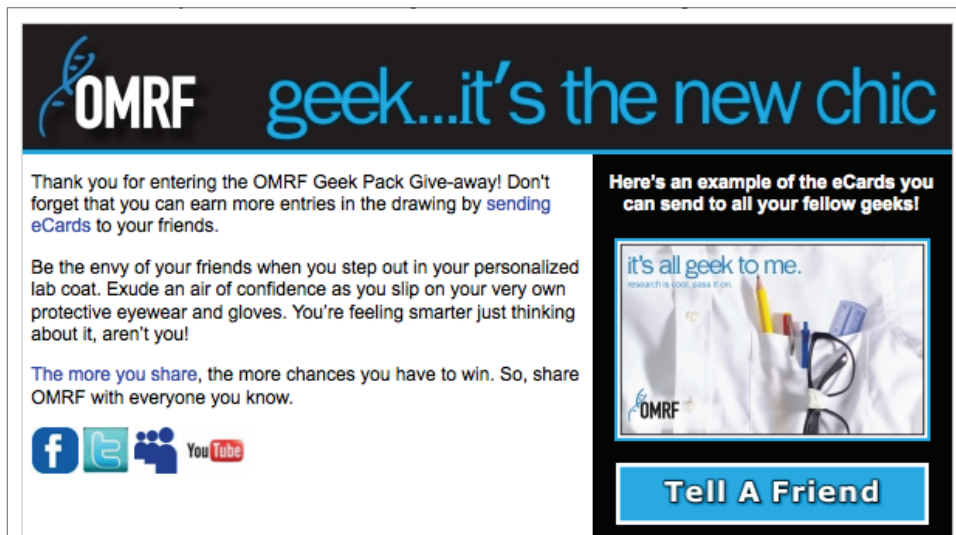
*Establish a clear pathway to participate*

To keep the momentum going, OMRF engaged email recipients further with a brief eCard reminding them to register to win and inviting them to forward funny content (in this case uber-cool eCards which OMRF designed based on a Convio template) promoting the campaign to family and friends.



*"Talk Nerdy To Me" Reminder eCard: Don't let another day slip away—register today to win!*

OMRF also sent out a thank you for entering eCard that kept the pass-it-on theme alive by reminding entrants that they could further increase their odds of winning every time they passed the eCard along.

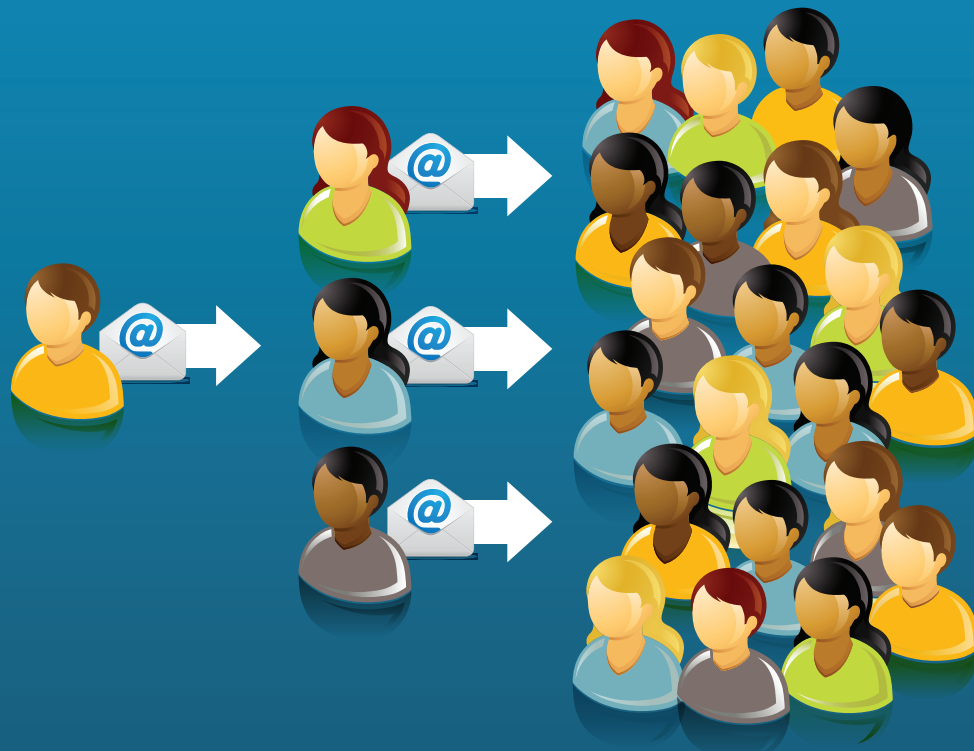


*"It's All Geek To Me" Thank you eCard: Don't forget, you can earn more entries in the drawing by sending eCards to your friends.*

# INTRODUCTION TO VIRAL MARKETING

“Forward to a friend” email campaigns, also known as viral marketing, can help you to 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.

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## CONTINUING THE CONVERSATION

### Developing Donor Relationships Online

Entrants that opted-in to receive future communications from OMRF were sent a two-part welcome series of communications that introduced the organization and suggested ways to learn more and get involved—read about OMRF’s latest research, watch videos, spread the word through social media, check out the blog, and support the organization with a donation, to name a few. Because supporters are usually the most passionate when they first engage with an organization (Go! participants commonly see high open rates in the 25-30% range with click-through rates averaging around 3%), the welcome series was a great way for OMRF to keep the momentum generated by its creative campaign going and help evolve participants’ interest beyond the level of a fun diversion to an actively supported cause.

**DISCOVERIES THAT MAKE A DIFFERENCE**  
**WELCOME**

Greetings from the Oklahoma Medical Research Foundation. In the coming months, we'll tell you more about our discoveries and how they affect your life and the lives of your loved ones.

Whether you're a new donor, casual observer, or longtime supporter of OMRF, I want to be sure you know about some of our online resources and additional ways you can get involved:

- **Read** about our scientists' latest discoveries in our [News Room](#)
- **Learn** more about a particular area of [disease research](#)
- **Watch** a [video](#) about some of our recent projects and how the science applies to your life
- **Support** medical research with a [donation](#) or a [memorial gift](#)
- **Honor** a loved one or raise funds for research through your own [Tribute Page](#)
- **Spread the word** to [your friends and family](#) about the important work being done in OMRF's labs

Thank you again for your interest in medical research and OMRF. However you choose to connect with us, you'll help us continue making discoveries that make a difference.

Sincerely,  
*Stephen M. Prescott*  
Stephen M. Prescott, M.D.  
President, OMRF  
Discoveries that Make A Difference

From the desk of  
  
Stephen M. Prescott, M.D.

**Donate Now**

**Tell A Friend**

**Create a meaningful tribute**  
Create a Tribute Page to honor someone you love, celebrate a special occasion, or share your fight against disease. [Get started](#)

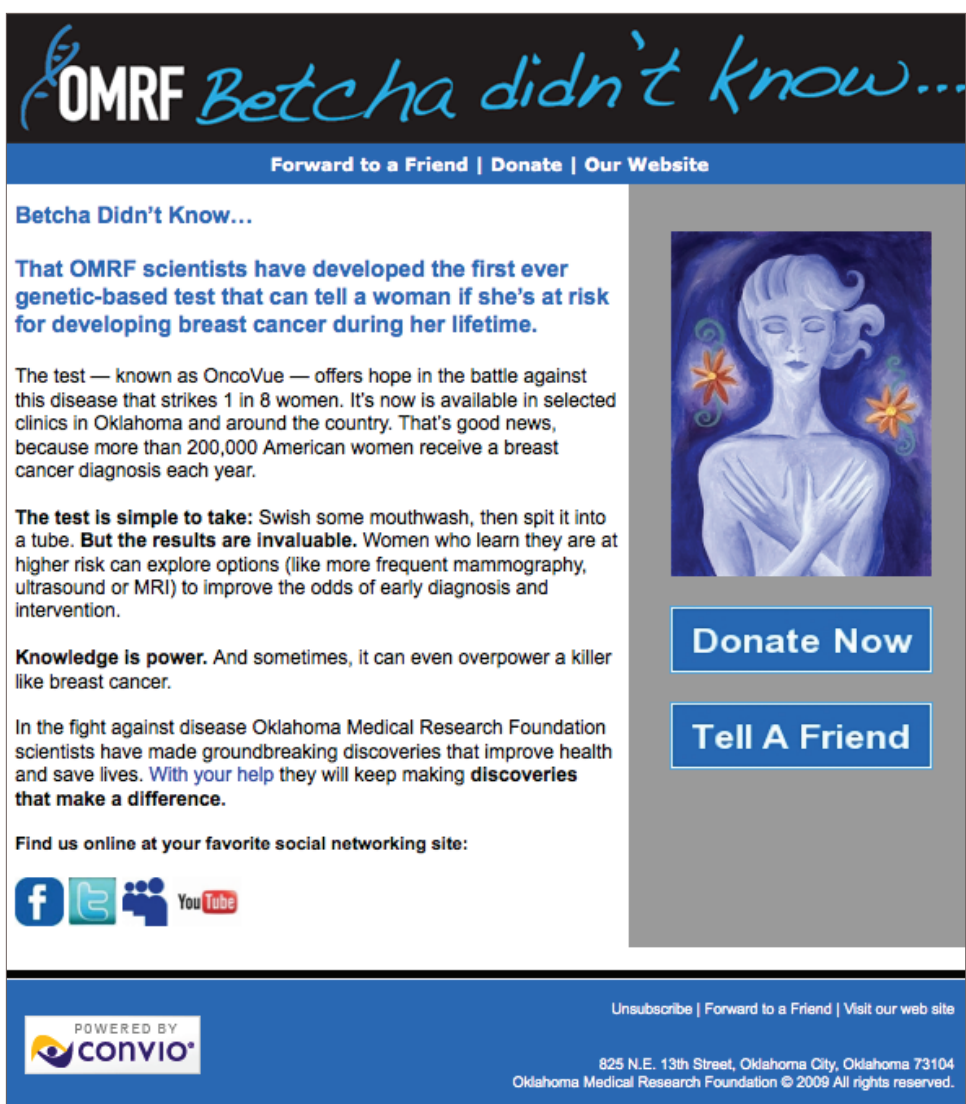
POWERED BY **convio**

Unsubscribe | Forward to a Friend | Visit Our Web Site

Oklahoma Medical Research Foundation | 825 N.E. 13th Street  
Oklahoma City, Oklahoma 73104  
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Part 1 of OMRF's Welcome Series





**OMRF** *Betcha didn't know...*

[Forward to a Friend](#) | [Donate](#) | [Our Website](#)

**Betcha Didn't Know...**

**That OMRF scientists have developed the first ever genetic-based test that can tell a woman if she's at risk for developing breast cancer during her lifetime.**





The test — known as OncoVue — offers hope in the battle against this disease that strikes 1 in 8 women. It's now available in selected clinics in Oklahoma and around the country. That's good news, because more than 200,000 American women receive a breast cancer diagnosis each year.

**The test is simple to take:** Swish some mouthwash, then spit it into a tube. **But the results are invaluable.** Women who learn they are at higher risk can explore options (like more frequent mammography, ultrasound or MRI) to improve the odds of early diagnosis and intervention.

**Knowledge is power.** And sometimes, it can even overpower a killer like breast cancer.


In the fight against disease Oklahoma Medical Research Foundation scientists have made groundbreaking discoveries that improve health and save lives. **With your help** they will keep making **discoveries that make a difference.**

Find us online at your favorite social networking site:

[Donate Now](#)

[Tell A Friend](#)

POWERED BY 

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

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Part 2 of OMRF's Welcome Series

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.



# INTRODUCTION TO WELCOME SERIES

A welcome series is a sequence of automated email messages in addition to any registration or donation auto-responder that a constituent receives over the course of their first 2-4 weeks on your email list. A solid, professional Welcome Series consists of 2-3 simple messages that set the tone for the relationship, create an identifiable voice for your organization, and educate new constituents about your mission and the scope of your impact before they start getting appeals.

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The first message is a personal greeting from the voice of your organization, often the Executive Director (or your CEO, your founder, a celebrity spokesperson, your volunteer coordinator or any other person you want your constituents to relate to on an ongoing basis). This message highlights the state of the organization with a focus on educating the constituent, especially about new and interesting approaches and results. The second and third messages in the welcome series should engage new constituents by highlighting specific ways they can get involved to support your mission. Place the emphasis on education, rather than asks.



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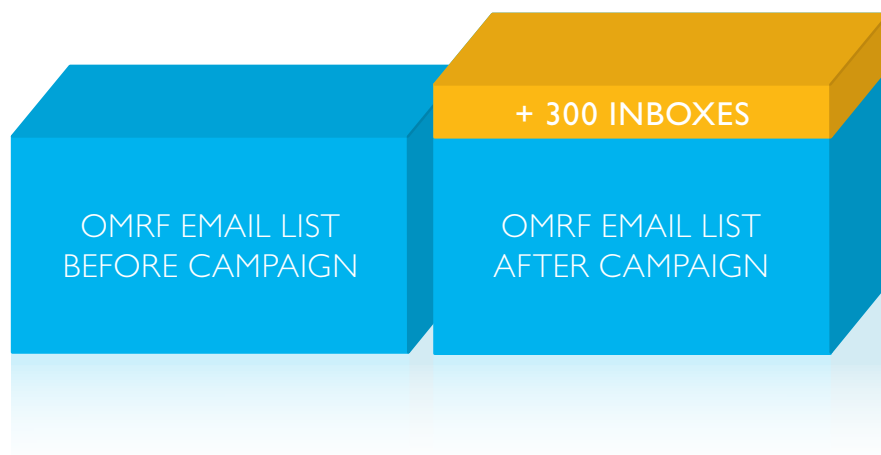
## 4 THE RESULTS

OMRF found that many of its supporters willingly forwarded information about the foundation's cause—to the tune of a 9% response rate. The efforts of these supporters combined to build community awareness and helped the “research is cool. pass it on.” message reach more than 300 new inboxes. 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. Identifying a core group of outgoing supporters proved to be a game-changing strategy for OMRF as they successfully ramped up their online fundraising efforts.

But while they saw immediate success with the Geek is Chic campaign, OMRF didn't ease up after early results. The foundation continued to work with their Go! team of consultants, trainers, and hands-on production assistants to execute the full 12 months of best-practice online communications—and their biggest gains were yet to come.

With new online savvy, OMRF planned a fully-integrated multi-channel campaign for end-of-year 2009. “Multi-channel messaging was critical for us because we needed to reach audiences across different generations,” says Jenny Lee, Creative Director. The campaign told the story of one young person's illness and ultimate triumph via OMRF's medical research. The results were eye-opening: when the dust cleared in January 2010, OMRF found they'd raised 50% more in 2009 than in 2008 despite a challenging economy. In addition, list-building efforts similar to the Geek is Chic campaign continued throughout the course of the year, ultimately resulting in a list size increase of over 94%.

With new systems in place to automate their online communications and an affordable way to experiment with messaging for young people, OMRF has vastly increased their overall development capacity.



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## CONCLUSION

The OMRF's Geek is Chic campaign illustrates the type of campaigns/marketing programs that can drive real results online. And for many Convio Go! clients, the strategies and tactics involved would have been a lot to tackle on their own, limiting their ability to prove their mission deserved such support. Whether your objectives include raising money, increasing website traffic, building an email file, driving responses to an advocacy appeal, or all of the above, Go! can deliver. After ten years of launching online initiatives for over 1,000 leading nonprofits, we've distilled the highest-impact best practices in online fundraising into the program, along with a software toolbox that can grow as you do, plus a team of experts to guide you through your first online campaigns.

With the Go! Program guiding you through each step of online fundraising for an entire year, you can get your programs up and running quickly, inexpensively, and successfully. So you can get back to dreaming big for your mission.

To find out how to get started with Go!, visit us online at [www.convio.com/go](http://www.convio.com/go), give us a call at 888.528.9501, or drop us a line at [info@convio.com](mailto:info@convio.com).

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## ABOUT OMRF

Founded in 1946, Oklahoma Medical Research Foundation (OMRF) is one of the nation's oldest and most respected nonprofit biomedical research institutes. Located in Oklahoma City, OMRF fosters a worldwide reputation for excellence by following an innovative cross-disciplinary approach to medical research. OMRF scientists are dedicated to understanding and developing more effective treatments for human disease, focusing on such critical research areas as heart disease, cancer, lupus and Alzheimer's disease. OMRF is home to Oklahoma's only Howard Hughes Medical Institute investigator, and with more than 600 U.S. and international patents, OMRF ranks among the nation's leaders in patents per scientist.

To find out how you can help, visit [www.omrf.org](http://www.omrf.org).

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## 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](http://www.convio.com).

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