



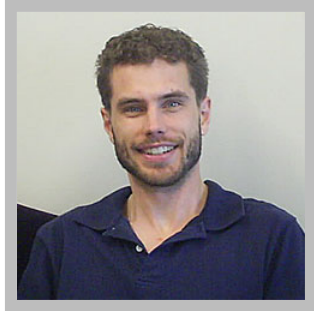
Effective Online Marketing 101.3:

Measuring and improving housefile health

Patrick Hansen and Kenan Pollack
Senior Interactive Consultants



About Us



Patrick Hansen

Senior Interactive Consultant

- Eight years experience non-profit web site development, database development, and marketing
- Four years R&D with IBM
- Published author with 12 patents
- Manager of the Convio Go! Program
- Client list includes America's Second Harvest, National Relief Charities, National Women's Law Center, Paul Anderson Youth Home



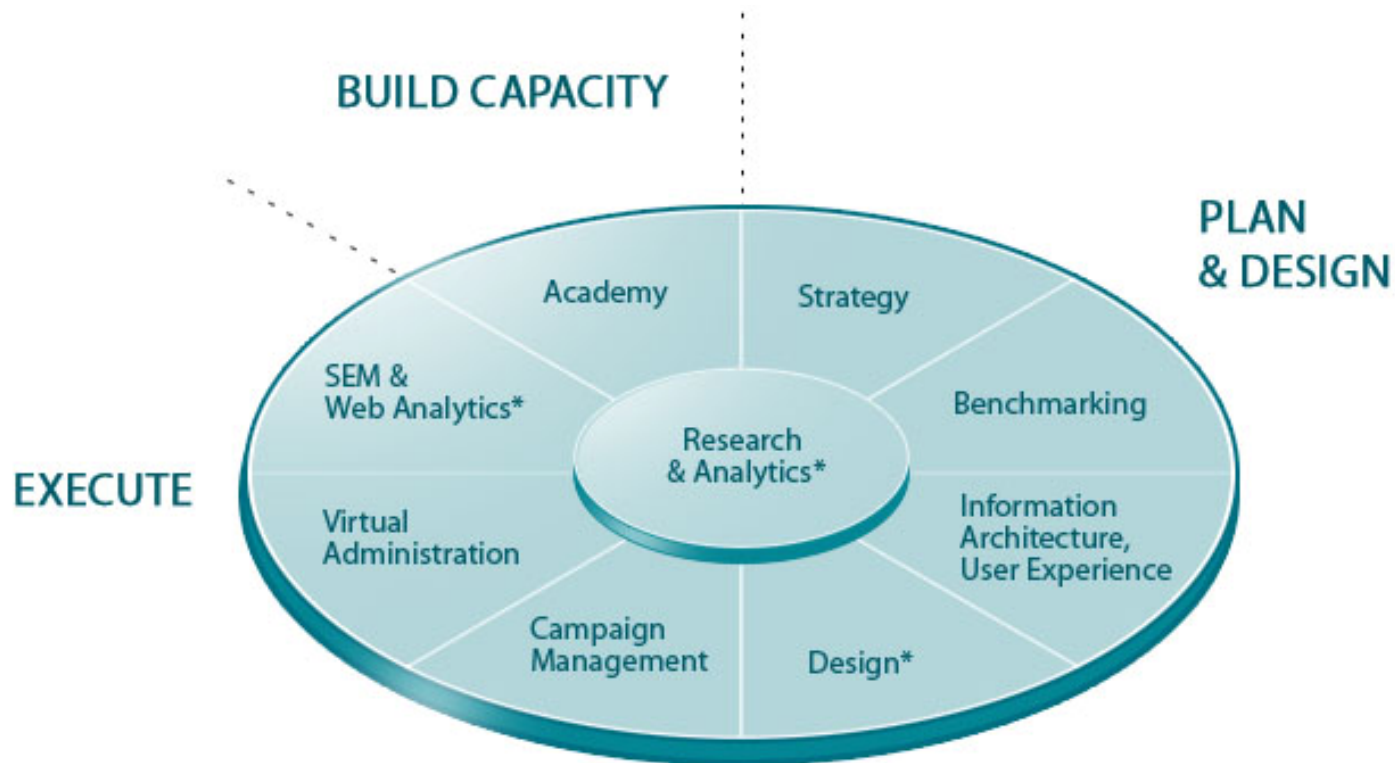
Kenan Pollack

Senior Interactive Consultant

- Twelve years experience Web site development, content management and marketing
- Four years Web site and IT management at Aid to Artisans
- Published book author and former national newsmagazine reporter
- Client list includes World Wildlife Fund, FairTax.org, Goodwill/Easter Seals of MN, American Diabetes Association

About Convio's Client Success Services

50+ person agency within Convio to provide clients with the strategy, interactive services and online marketing best practices to achieve ongoing success



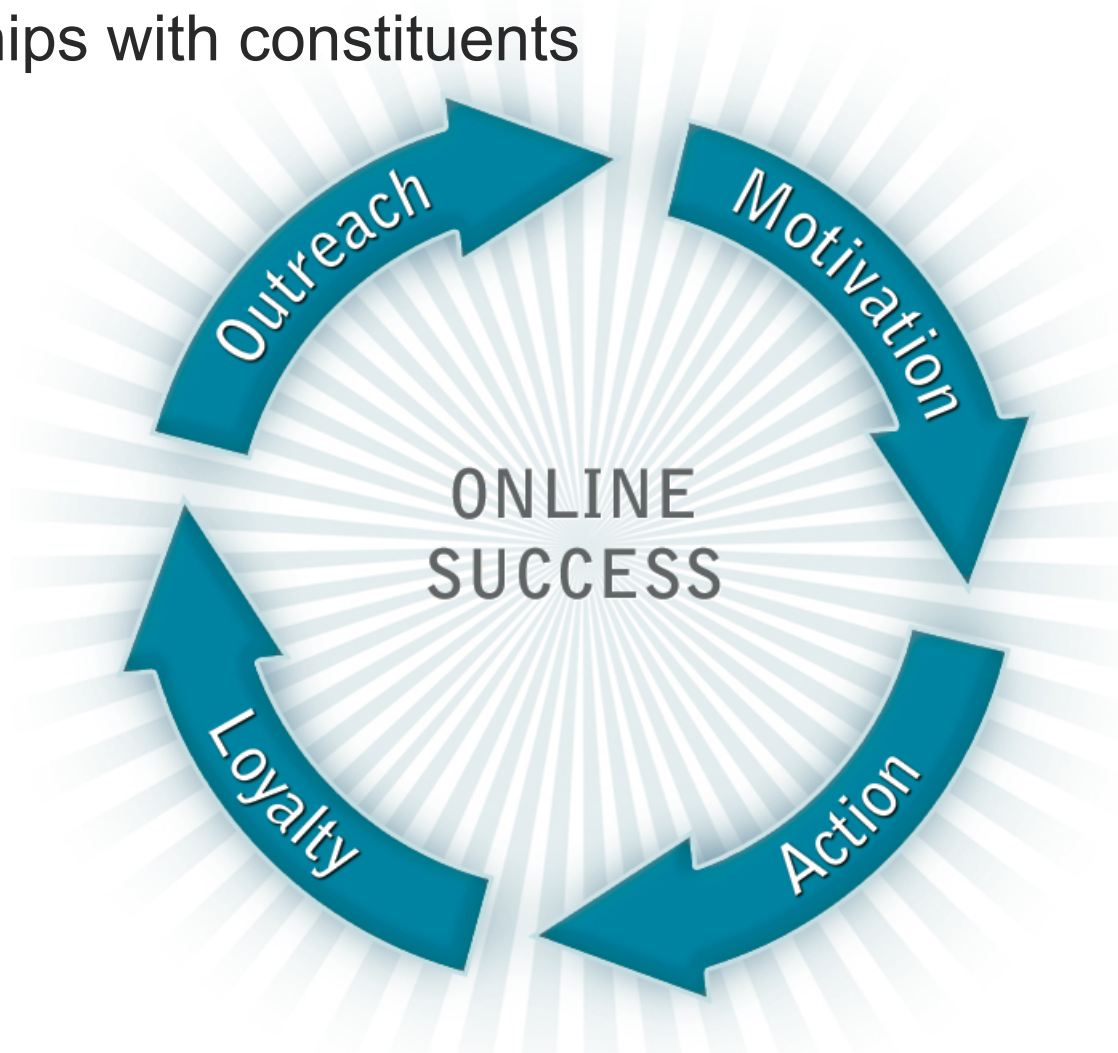
* Utilize specialized partners

Webinar 101 Two-Part Series

- *Optimizing Your Web site 101* is focused on design and techniques for your Web site – getting visitors in and getting them to stay
- *Effective Online Marketing 101* is focused on outbound marketing techniques and campaigns – drawing visitors in through targeted communications

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents



Relationship Building Framework: eCRM

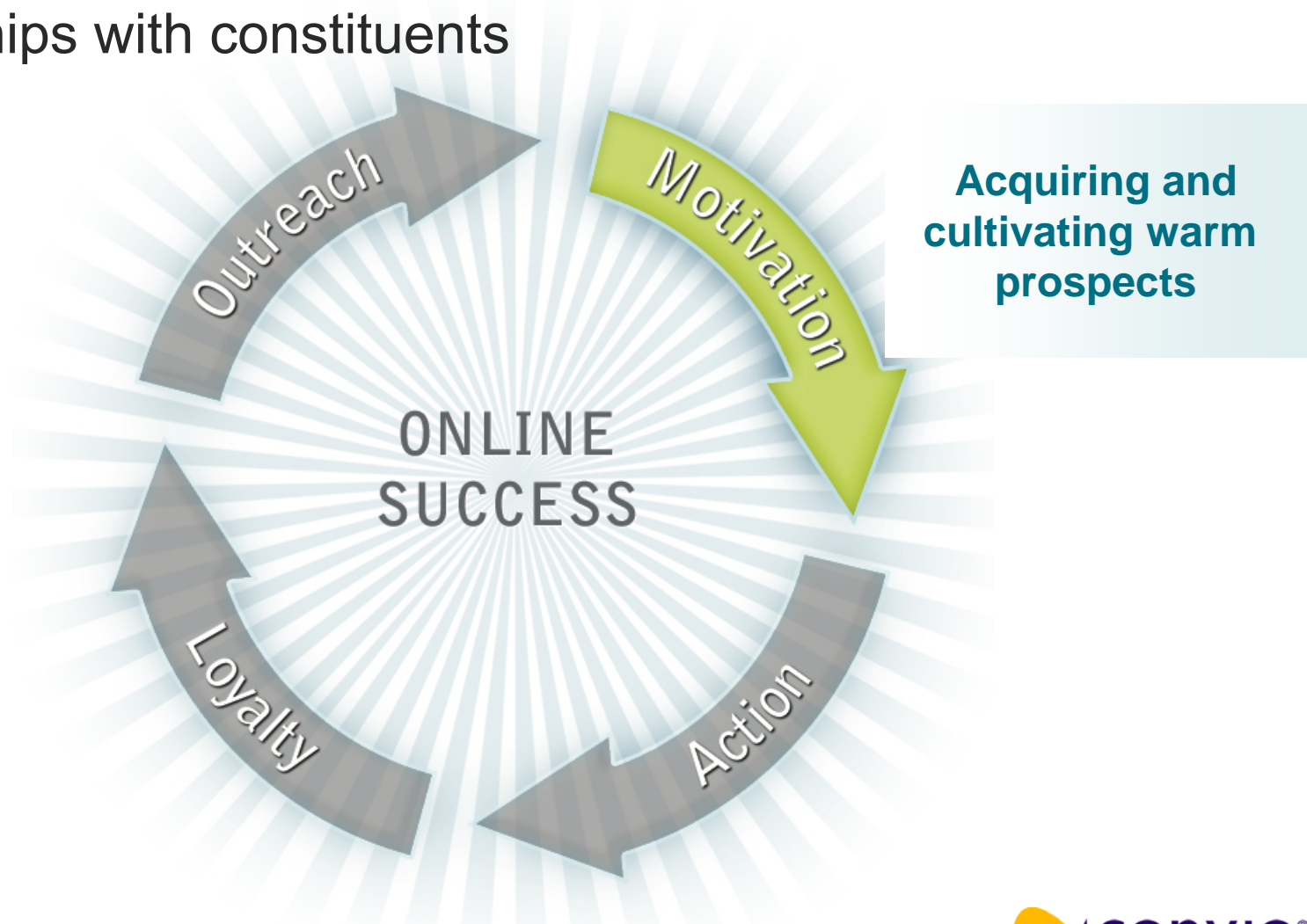
eCRM is the practice of using the Internet to build life-long relationships with constituents

Strategically
drawing traffic
into your site



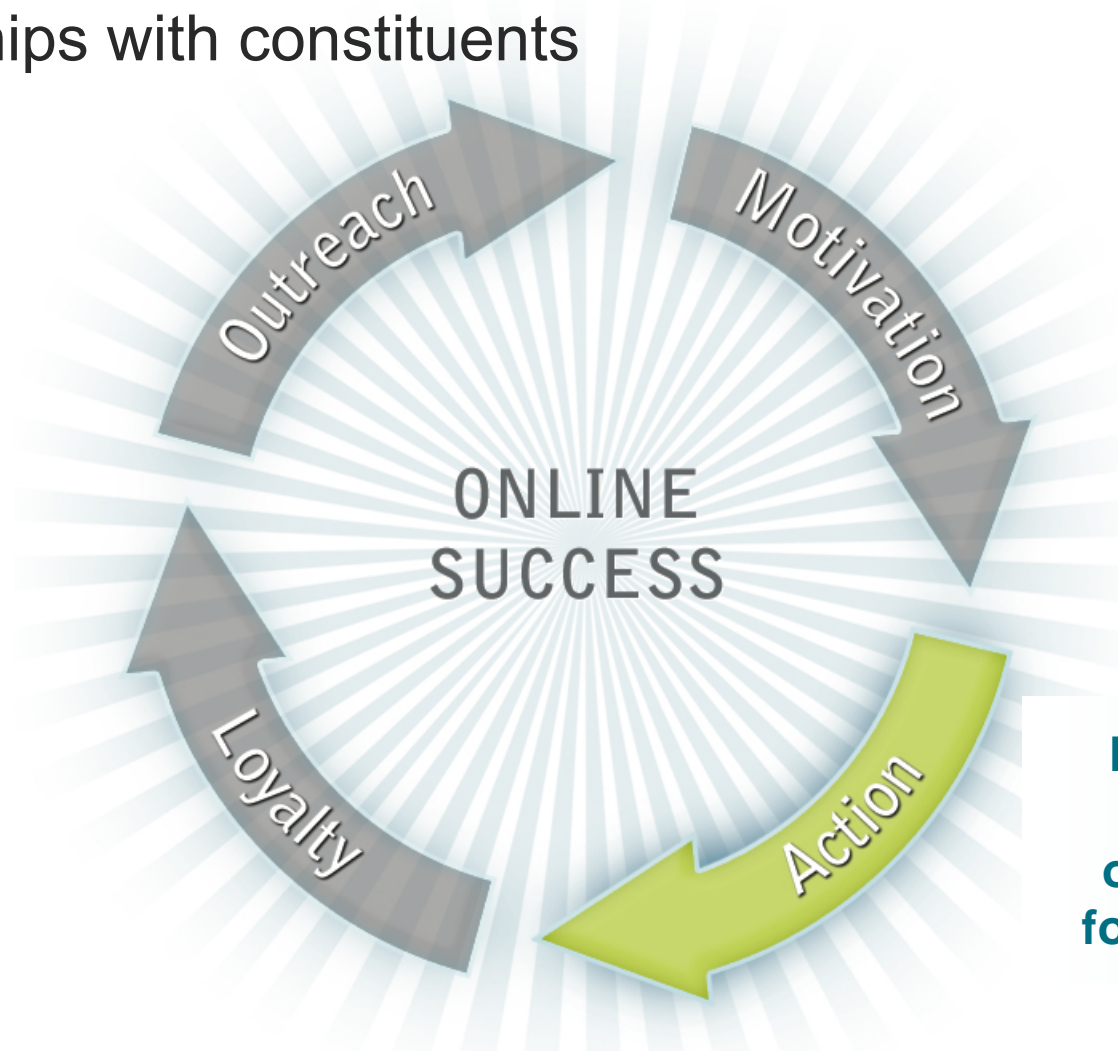
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Relationship Building Framework: eCRM

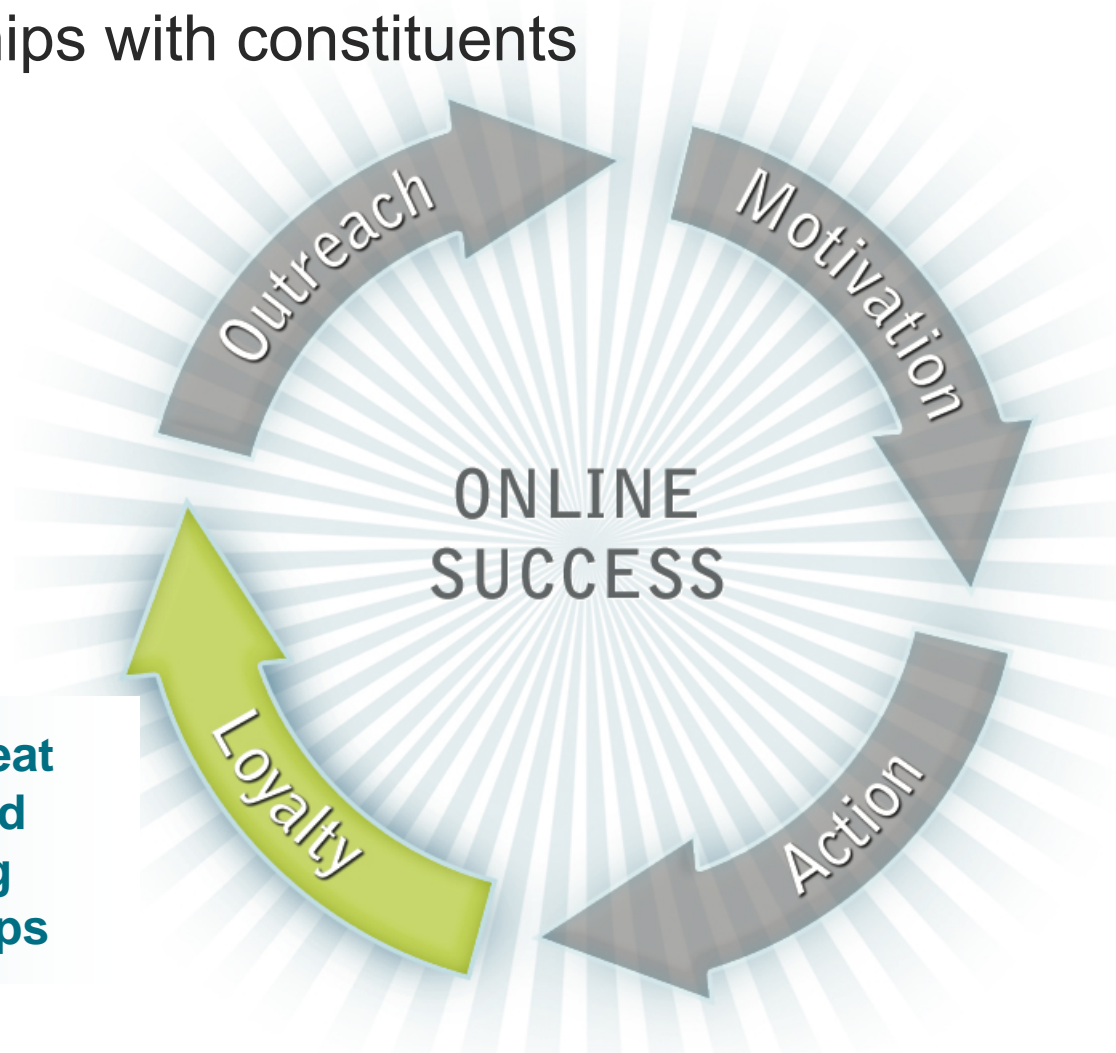
eCRM is the practice of using the Internet to build life-long relationships with constituents



Encouraging
interactive
opportunities
for engagement

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents

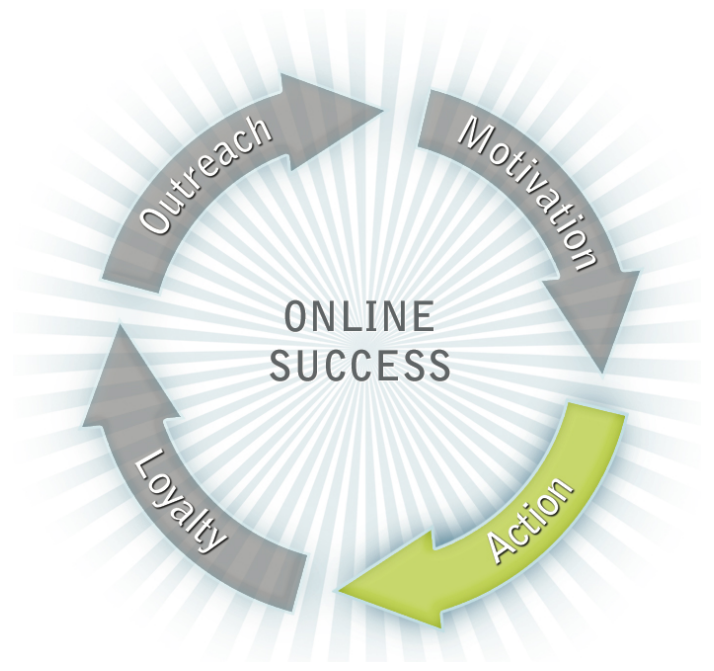


**Driving repeat
actions and
advancing
relationships**

Today's Objectives: Motivation

At the end of today's session, you should feel empowered to:

1. Evaluate your housefile and its health
2. Understand your housefile composition (Who's in your file?)
3. Identify interactive tactics for learning more about your housefile



Your Homework...

- ▶ Watch this space for ideas on what you can start doing **now**...

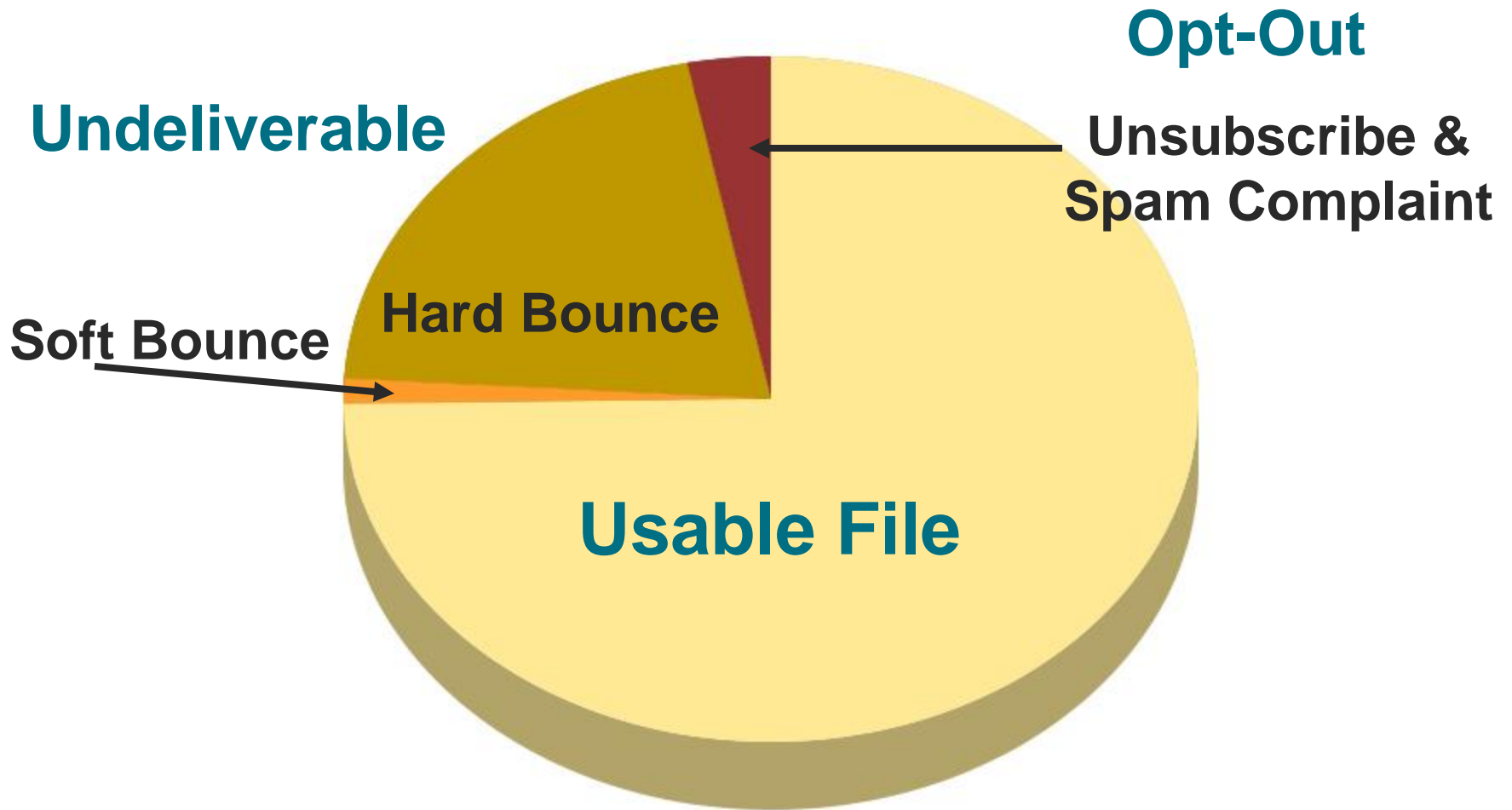
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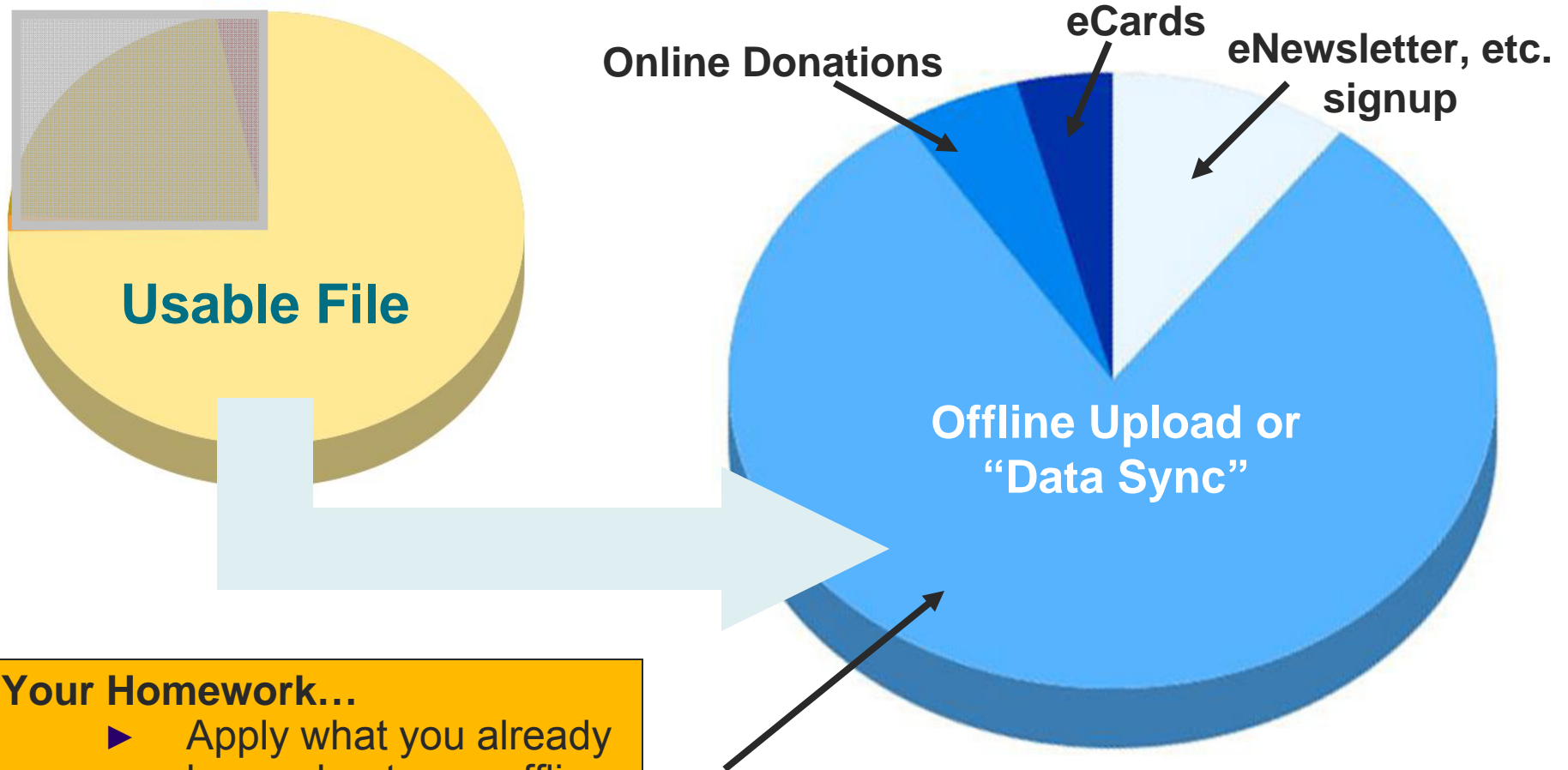


Basics: Housefile Terms & Definitions



Email Housefile

Basics: Housefile Terms & Definitions



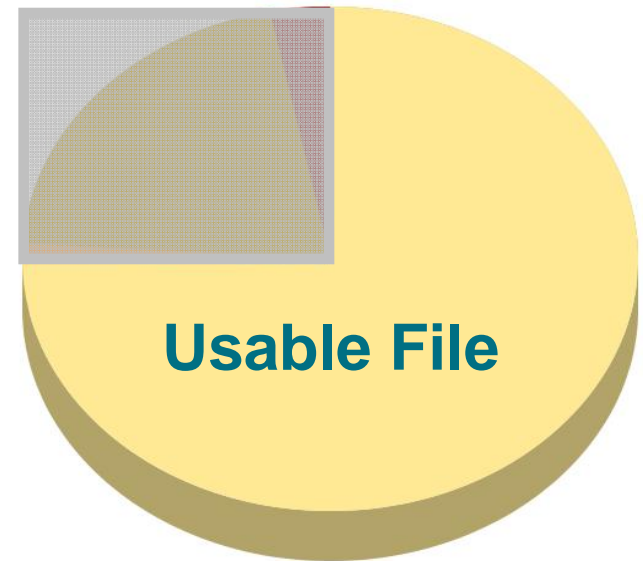
Your Homework...

- ▶ Apply what you already know about your offline names (from direct mail appeals, events, volunteers, etc.) to your housefile

For new or smaller organizations (even many larger ones), the vast majority of emails come from offline sources.

Housefile Health: Is your usable file *engaged*?

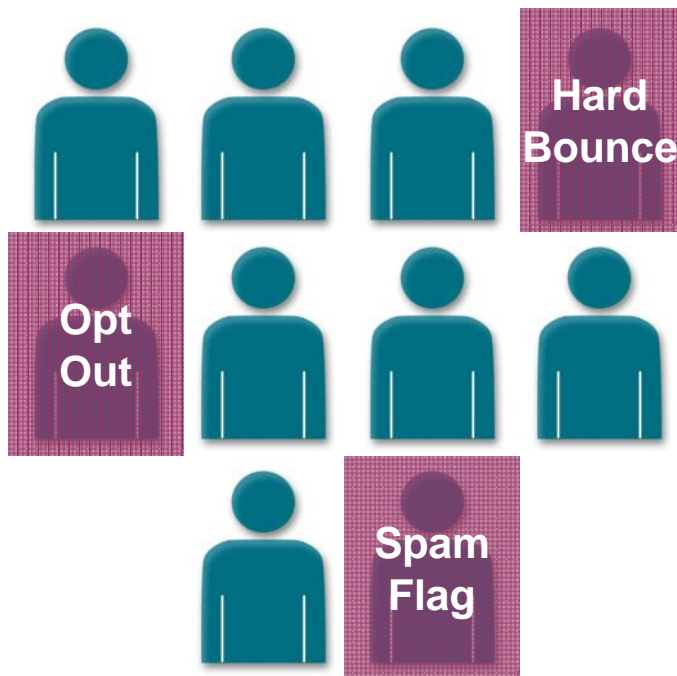
- Your “usable” file means the emails are deliverable, *but it says nothing about engagement.*
Some ways to measure that:
 - Email appeal open rate
 - ▶ Average: 14%
 - Email appeal click-through rate
 - ▶ Average: 2%
 - Email appeal response rate
 - ▶ Average: 0.07%



Housefile Health: Is your usable file *shrinking*?

- Housefile attrition or “*churn*” can mean fewer online constituents even as you add new email addresses

How do we measure churn?



$$\text{Churn} = \frac{\# \text{ Constituents Lost}}{\text{Total File Size}} \%$$

Benchmarks:

~20% annual churn

~1.8% monthly churn

Source: Sample of 20 Convio clients; 2007-2008

Housefile Health: Is your usable file *shrinking*?


- Housefile attrition or “*churn*” can mean fewer online constituents even as you add new email addresses

How do we measure churn?

 Churn =
$$\frac{\text{\# Constituents Lost}}{\text{Total}} \%$$

Group Summary	
Group ID:	2
The number of users in this group:	24946
The number of active users in the group:	24934
The number of users with email status 'Hard Bounce':	5327
The number of users with email status 'Soft Bounce':	119
The number of users who opted out from email:	557
The number of users with valid email:	19056

Last update at: Jul 23, 2008 11:18:51 PM

 Refresh Summary

Your Homework...

- ▶ Take a monthly “snapshot” of your housefile health; calculate and track your monthly churn rate

Constituent360 → Groups → Any Registered User → Edit

Today's Objectives: Motivation

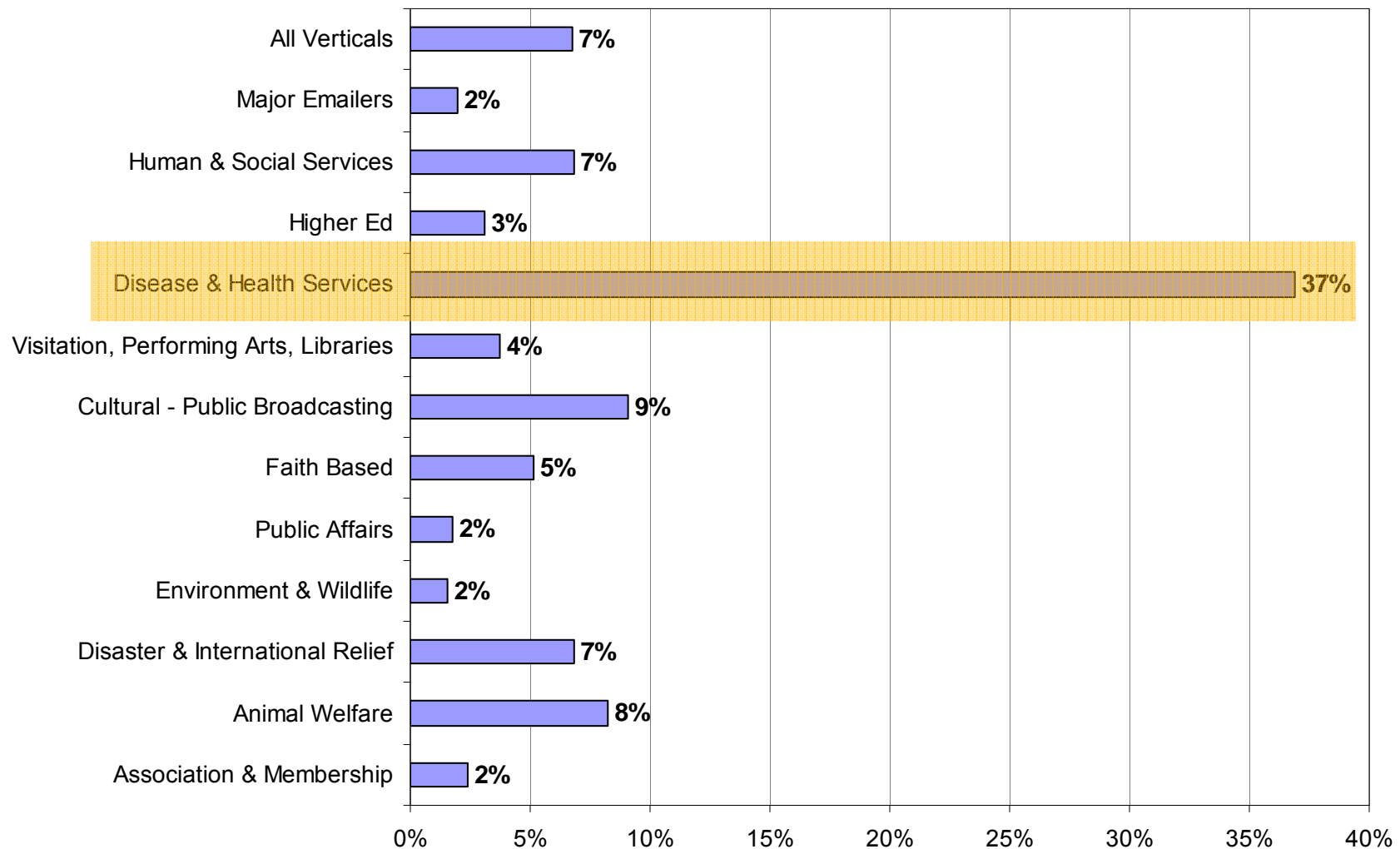
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Housefile Benchmarks: Donor Composition

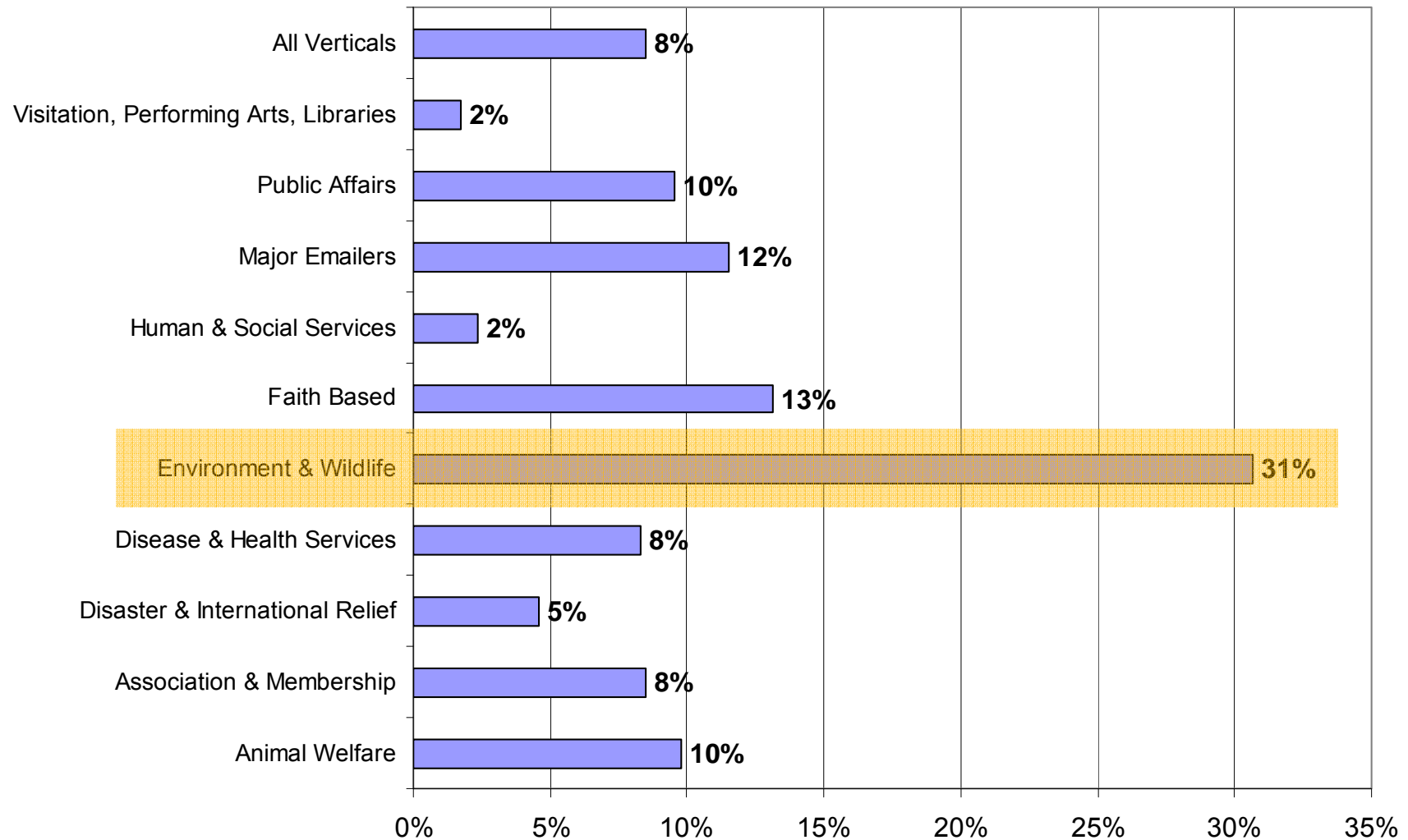
Donors as Percent of Total Email File



Source: Convio; Median of total donors ending June 30, 2007 divided by total email file ending June 30, 2007

Housefile Benchmarks: Advocate Composition

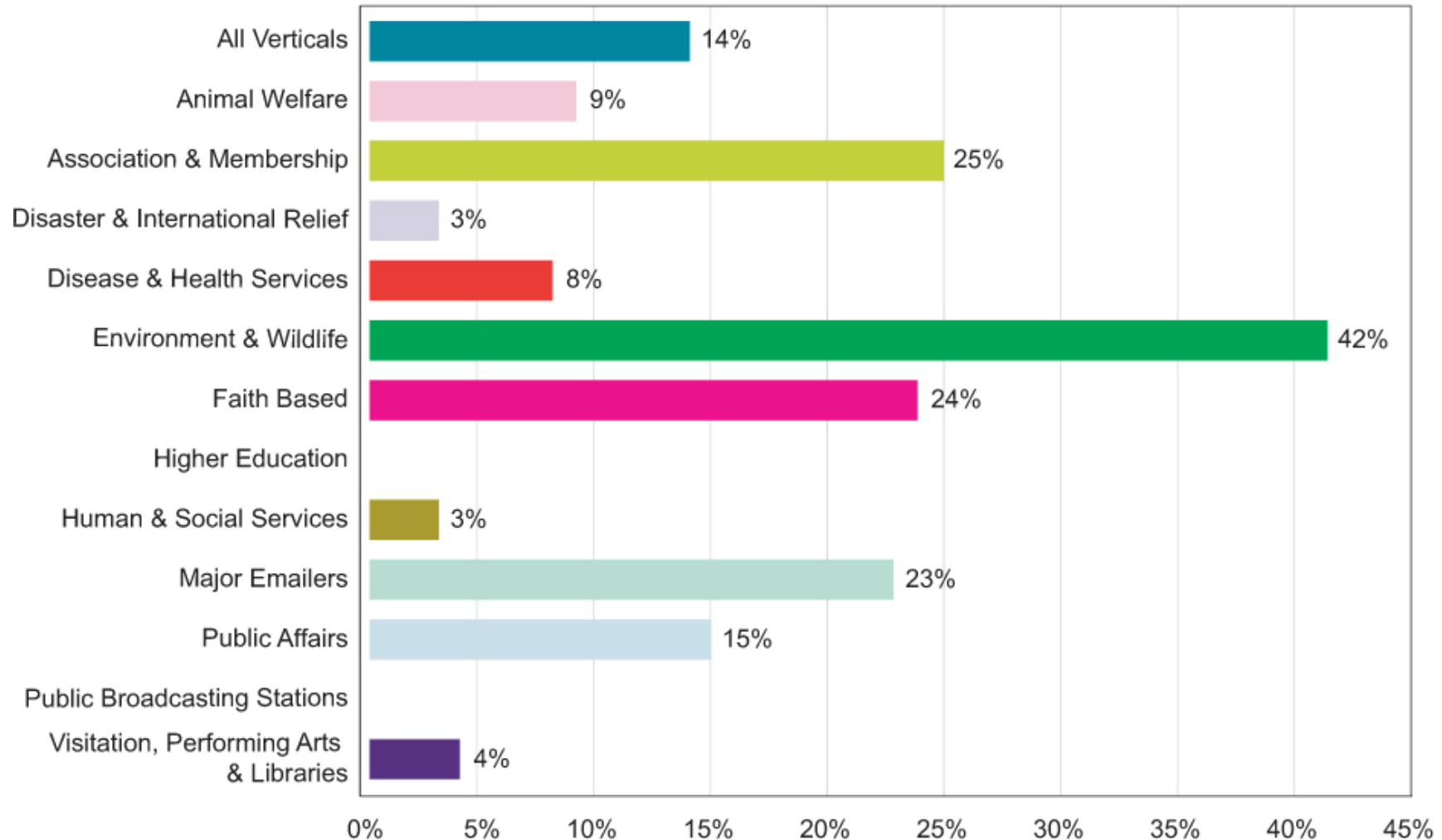
Advocates as Percent of Total Email File



Source: Convio; Median of total donors ending June 30, 2007 divided by total email file ending June 30, 2007

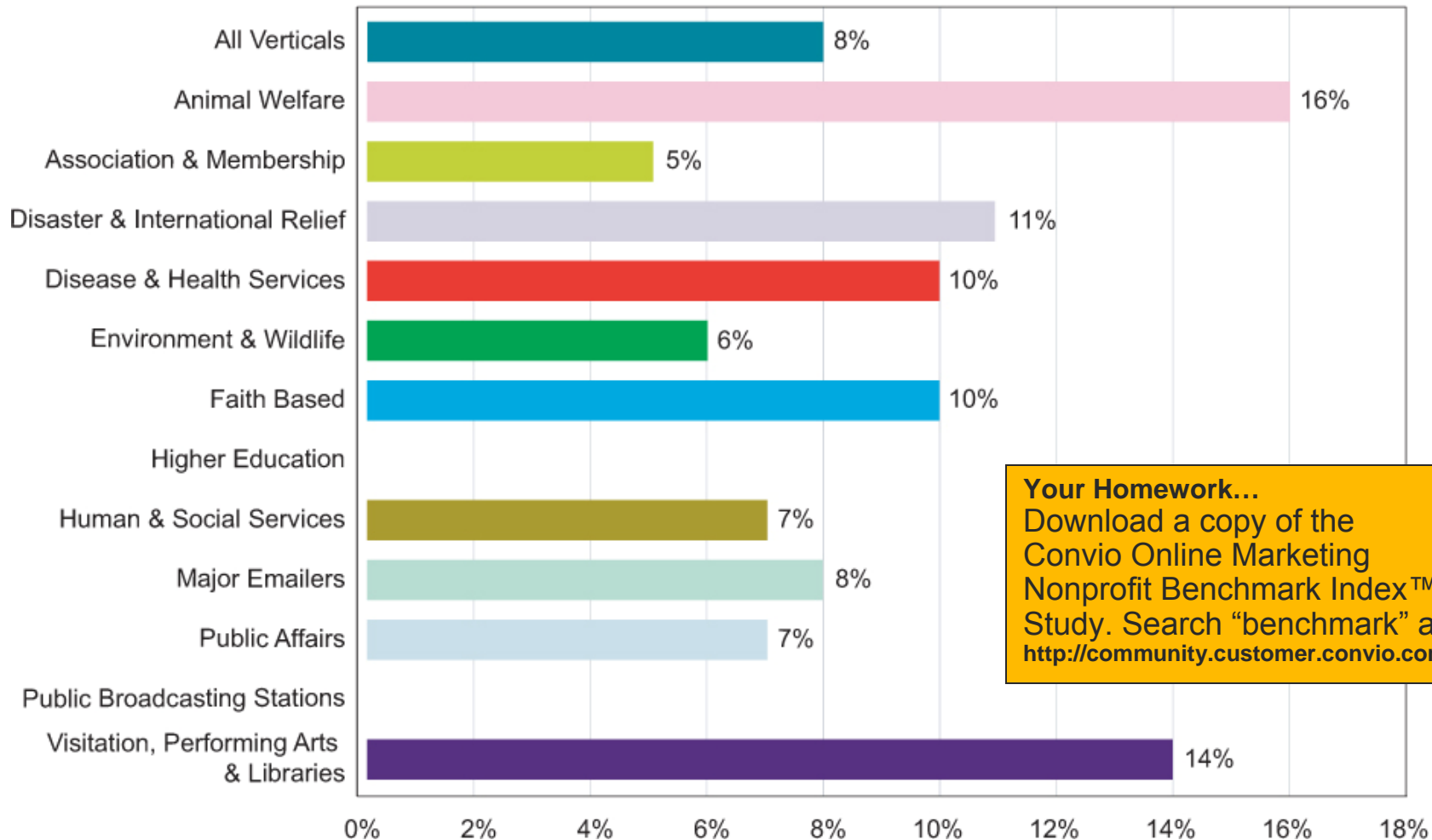
Housefile Benchmarks: Donors Who Advocate

Donors Who Have Also Advocated
Median % of Advocates on Donor File July 2006 - June 2007, n = 75



Housefile Benchmarks: Advocates Who Donate

Advocates Who Have Also Donated
Median % of Donors on Advocate File July 2006 - June 2007, n = 75



Your Homework...
Download a copy of the
Convio Online Marketing
Nonprofit Benchmark Index™
Study. Search "benchmark" at:
<http://community.customer.convio.com>

Housefile Composition: Literal Segmentation

Who's in your file?

Category	Action? Yes.	Action? No.	Action? Yes, but not recently.
Donations	Donor	Non-Donor	Lapsed/Inactive
Activist	Advocate	Non-Advocate	Lapsed/Inactive
Events	Participant	Non-Participant	Lapsed/Inactive
Volunteering	Volunteer	Non-Volunteer	Lapsed/Inactive
eCommerce	Buyer	Non-Buyer	Lapsed/Inactive

- This approach is direct and measurable
- Clients or service recipients, not shown here, are often part of your file and may require special consideration in messaging.

Housefile Composition: Behavioral Segmentation

Category	What do they do?	Behavior Label
Donations	Make a regular end-of-year contribution	"Tax-I"
Donations	React to key event or situation	"First Responder"
Advocacy	Send email/fax to elected official	"Rebel with Your Cause"
Volunteering	Highly-motivated, invite/bring others	" <i>Uber</i> teer"
Organization Awareness	Go viral: Send eCards, use Web 2.0 promo tools, blog	"Evangelist"

Your Homework...

- ▶ Identify three or four key segments and how you would invite them to take action.

Today's Objectives: Motivation

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Using Interactions to Drive Segmentation

- Each segment should have at least one opportunity to take action on your homepage

Your Homework...

- ▶ Add three or more segment-driven actions to add to your homepage

The screenshot shows the DOROT website homepage. At the top, there is a navigation bar with links for Home, Login, Email, Print, and a phone number (ASK DOROT 212.769.2850), along with a DONATE button. The DOROT logo is prominently displayed, with the tagline "Enhancing the lives of the elderly and bringing generations together". Below the logo, there are four main navigation tabs: ABOUT DOROT, FOR SENIORS, FOR VOLUNTEERS, and FOR CAREGIVERS. A "QUICK LINKS" sidebar on the left includes options like "Dates to Remember", "Press Room", "Telephone Programs", "Resources", "Media Broadcast Placements", "E-MAIL UPDATES" (with an email address field and "Sign Up" button), and "ASK DOROT" (with a text box for inquiries). The main content area features a large banner for the "DOROT 32nd Annual Gala" with a photo of the event and the text "A LOOK BACK AT THIS YEAR'S GALA". Below the banner, there is a "Save the Date!" section for Rosh Hashanah Package Delivery on Sunday, September 21, 2008, with a link for "ONLINE REGISTRATION NOW AVAILABLE". Another section titled "The Jewish Week" features an article about Vivian Fenster Ehrlich, DOROT's outgoing Executive Director, with a "Read More" link. A "FEATURED VOLUNTEER OPPORTUNITY" box highlights "Help Homeless Seniors" with a "LEARN MORE" link. At the bottom, there are logos for DOROT Westchester, The Hebrew Institute at DOROT, Friendly Visiting, and FJC (A Foundation of Philanthropic Funds), along with a footer containing "FAQs | Bookmark | Careers | Site Map | Privacy Policy" and contact information.

Using Interactions to Drive Segmentation

- Apply segmentation consistently across interactions
- Pay special attention to initial touch-points

Join our online hunger relief community

Help us fight hunger in Northeast Ohio by joining our online community. Sign up to receive updates about our efforts to alleviate hunger and information on how you can help.

* denotes required field

Your Information

* First Name:

* Last Name:

* Email:

Street 1:

Street 2:

City:

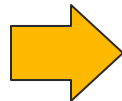
State / Province:

* ZIP / Postal Code:

Remember me. [What's this?](#)

I would like to receive:

- Advocacy Network Action Alerts
- Updates on Volunteer Opportunities
- Food for Thought Online Edition



Your Homework...

Audit the experience of new constituents for consistency & segmentation opportunities

If you are unable to view the message below, [Click Here](#) to view this message on our website

The vital link between food and hunger

Tell a Friend | www.clevelandfoodbank.org | Donate

Dear Patrick,

Welcome to the Cleveland Foodbank's online community—our most effective way to keep special friends like you up to date on the fight against hunger in our region.

We are grateful for your interest in our mission and want to share our work with you in a timely way. It is your generosity and concern that make our community's efforts to fight hunger successful. With community support, we can:

- Provide enough food for more than 55,000 meals a day
- Provide hot meals and nutrition education to at-risk children through after-school programs
- Distribute over 4,000 prepared meals a day for local shelters, hot meal programs and other feeding programs
- Distribute 5.6 million pounds of fresh fruits and vegetables annually to families in need

We look forward to updating you about our work—this is your community's food bank, and we want you in the loop! You can [update your profile or email address](#) or [unsubscribe from our email list](#) at any time.

Please share our news with your friends and family. Every bit of support is important, whether it is through donating, volunteering, or helping in any way. We are glad to have you join us in the fight against hunger and are making a real difference!

Sincerely,

Anne Campbell Goodman
Executive Director

Email: info@clevelandfoodbank.org

From the desk of

Anne Campbell Goodman

Donate Now

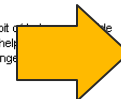
Your subscriptions:

- Food For Thought
- Advocacy Updates
- Volunteer Updates

Subscribe

What's in our Food for Thought newsletter?

[View a recent online-only edition >](#)



I would like to receive email about the following selected topics

Expand All Collapse All

Email Interests	Description
<input type="checkbox"/> Advocacy Network	Take a stand in the fight to end hunger: Get hunger advocacy action alerts for the Northeast Ohio area
<input checked="" type="checkbox"/> Food for Thought Online Edition	Stay informed: Get special online-only updates on the impact you have by supporting the Cleveland Foodbank
<input checked="" type="checkbox"/> Volunteer Opportunities	Lend a hand: Get notifications when we need volunteers to help run our programs, pantries, and special events

Summary of Your Homework and Next Steps

- **Learn more about non-profit email file composition**
 - ▶ Download a copy of the Convio Online Marketing Nonprofit Benchmark Index™ Study from customer.convio.com
 - ▶ Take a monthly “snapshot” of your housefile health; calculate and track your monthly churn rate

- **Implement a segmentation strategy**
 - ▶ Apply what you already know about your offline names (from direct mail appeals, events, volunteers, etc.) to your housefile
 - ▶ Identify three or four key segments and how you would invite them to take action.

- **Use online interactions to build segmentation**
 - ▶ Add three or more segment-driven actions to add to your homepage
 - ▶ Audit the experience of new constituents for consistency and segmentation opportunities



Q & A

Submit questions by typing them into the question text box and then hitting the “Ask” button





Thank you!

You can access these slides and recording in our online
Community at:

<http://community.customer.convio.com/community/webinars>

And register for our next Webinar:

***Optimizing Your Web site 101.4:
Creating Effective and Engaging Forms -- Sept 10***

