



# Effective Online Marketing 101 special session: Effective TeamRaiser Events

**Lara Fermanis**  
Principal Consultant



# About the Presenter

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## Lara Fermanis Principal Consultant



- Two years with Convio working with TeamRaiser clients
- Eight years experience in event-based fundraising
  - Breast Cancer, AIDS, Hunger, Suicide, Kids, and just Athletic
  - USA, Canadian and UK Events
  - 3-day 60mile and 2-day 60kl walks, 5K, 10K runs, rides, triathlons and hikes
  - Convio TeamRaiser Module, and other online solutions
- Clients include: Avon, American Diabetes, Canadian Cancer Society, CureSearch, Leukemia Lymphoma Society, National MS, Susan G. Komen, San Francisco AIDS Foundation and more

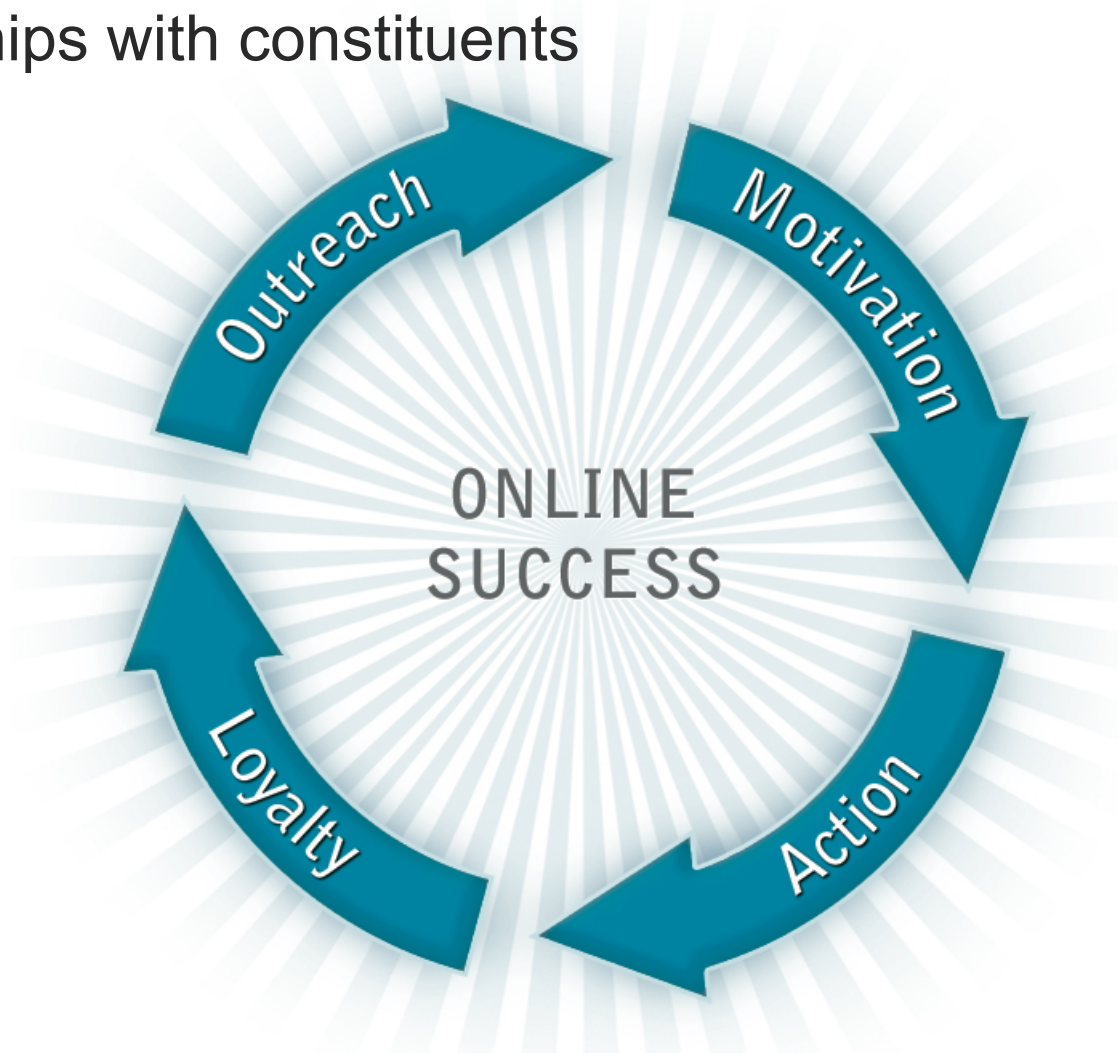
# Webinar 101 Series

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- *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
- *Effective TeamRaiser Events* is a special session focused on how to use TeamRaiser to inspire participants to raise more money, increase donations with or without increasing participants, and keeping participants engaged year after year.

# Relationship Building Framework: eCRM

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



# Relationship Building Framework: events cycle

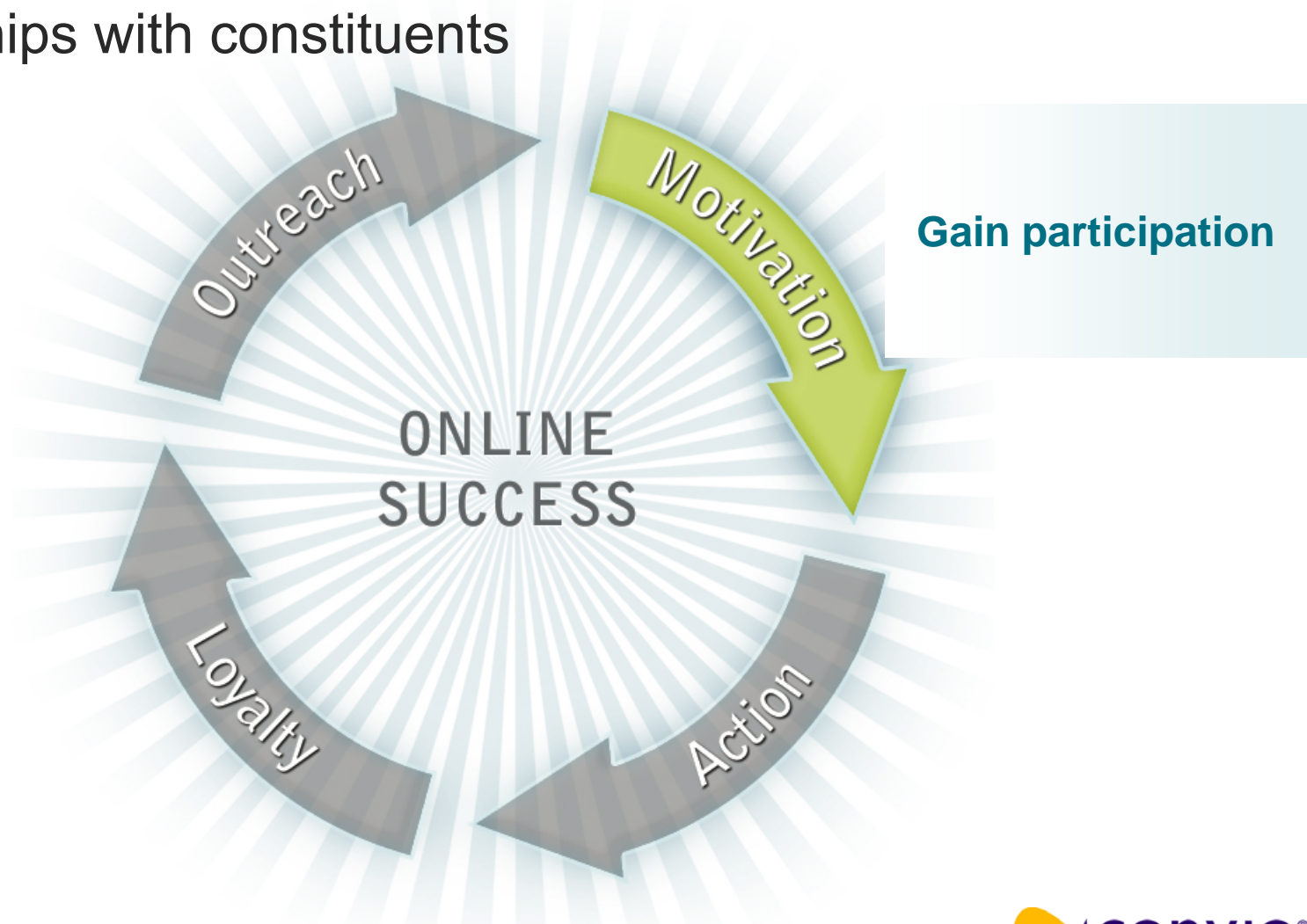
eCRM is the practice of using the Internet to build life-long relationships with constituents

Strategically  
gain interest



# Relationship Building Framework: events cycle

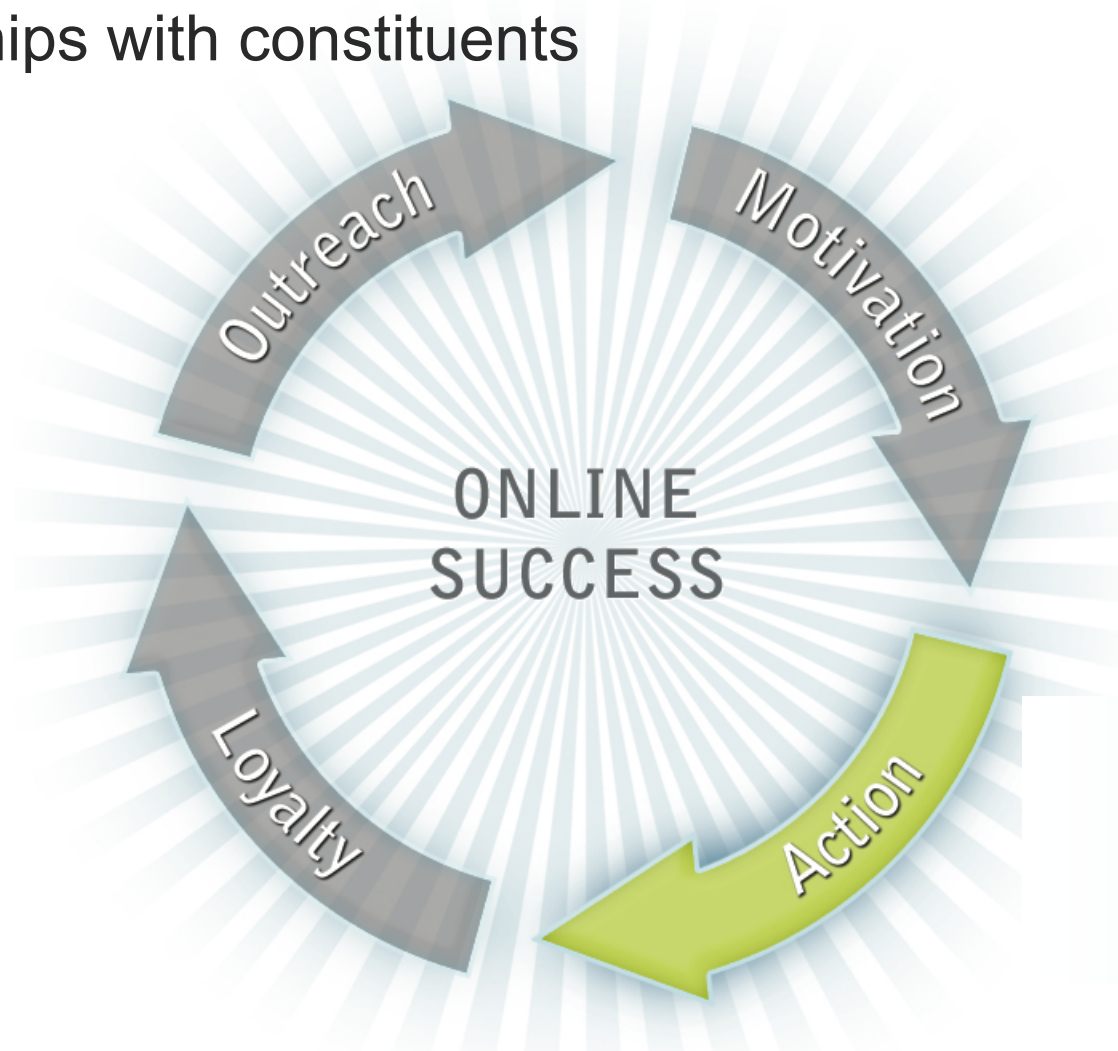
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# Relationship Building Framework: events cycle

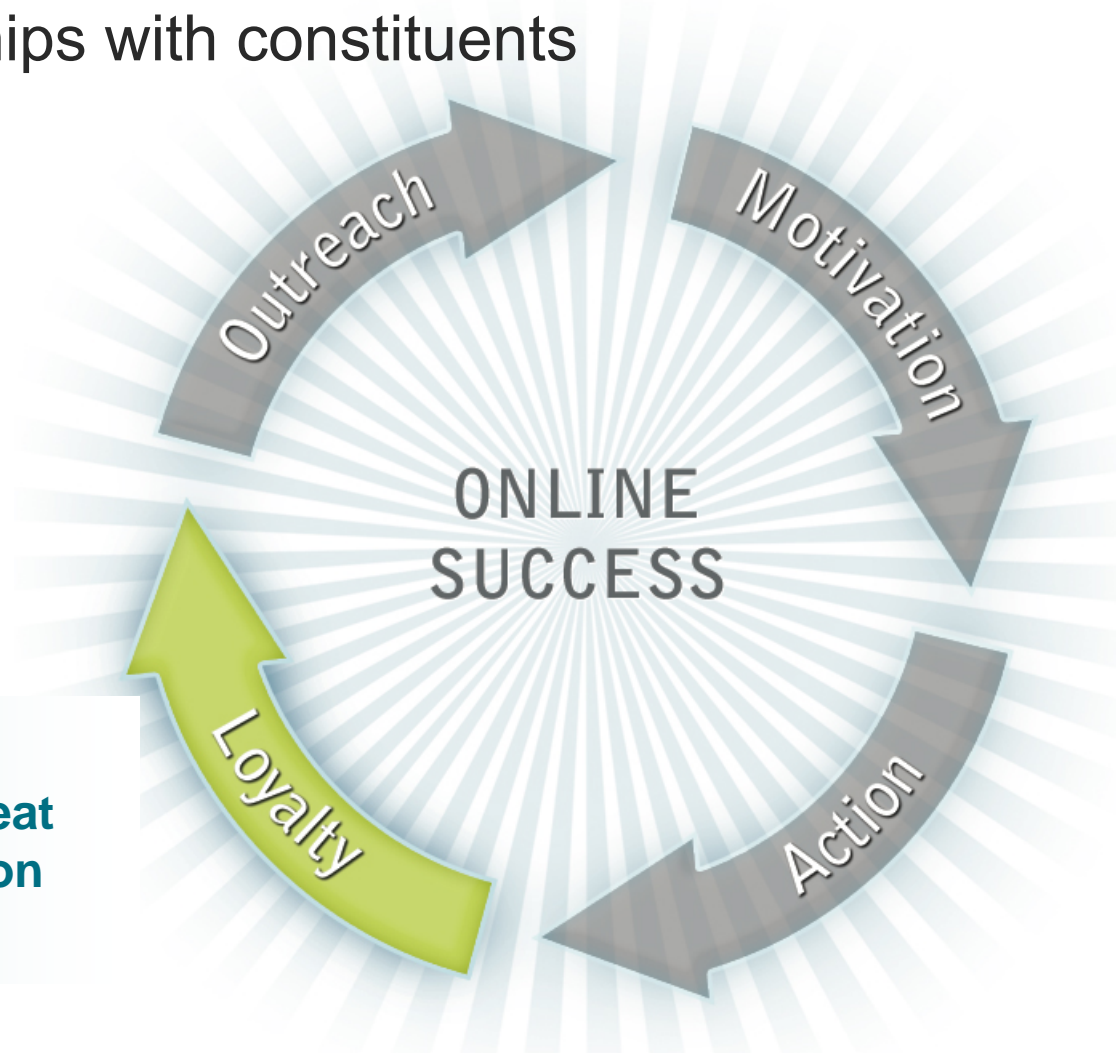
eCRM is the practice of using the Internet to build life-long relationships with constituents



Promote  
peer to peer  
fundraising

# Relationship Building Framework: events cycle

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



**Driving repeat participation**



# Today's Objectives:

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

1. Create new and innovative recruitment avenues
2. Get participants more engaged; have a more complete picture of your participant base
3. Improve average fundraising percentage per participant
4. Effectively use TeamRaiser to retain participants through a better experience



# Today's Objectives: Outreach

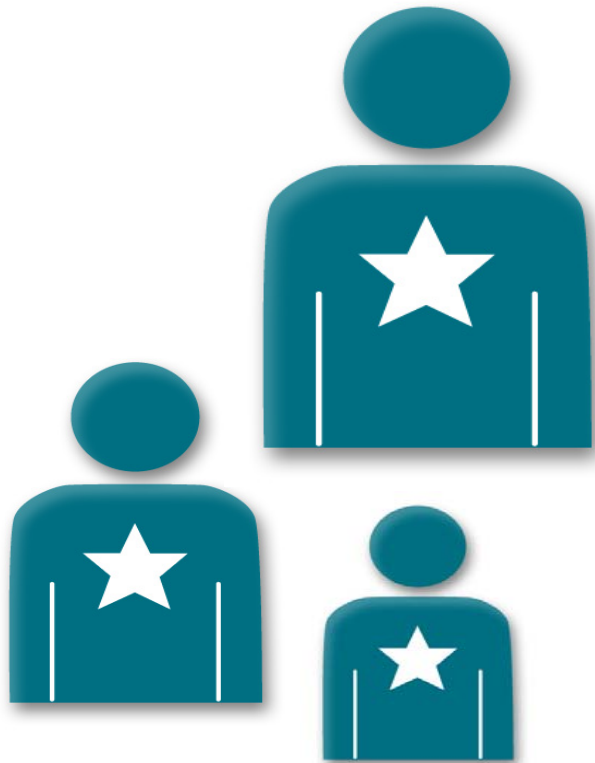
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# Innovative Recruitment Avenues

**Unique Visitors become new constituents when presented multiple opportunities to participant before, during or after the event.**



Good Modules for offering complementary opportunities are:

Survey

Personal Events

Calendar Events

StoryBuilder

# Innovative Recruitment Survey Example

The image shows two side-by-side screenshots of the Seismic Challenge website. The left screenshot displays the main navigation and a 'What's New' section. The right screenshot shows a registration form with a survey section circled in red.

**SEISMIC CHALLENGE**  
OCTOBER 18-19, 2008

Register Now Sponsor A Participant Request More Information Participant Center

**Login**  
Username:   
Password:   
 Remember me? **Sign In**  
Forgot Password?

**Welcome Visitors**  
Register Now  
Sponsor a Participant  
Calendar of Events  
Find a Training Ride  
About The Event  
Crew & Volunteers  
FAQ  
About SFAF  
Tell A Friend

**Registered Participants**  
Find a Training Ride  
Fundraising Tips  
Training  
Nutrition  
Seismic Partners  
Tell A Friend

**What's New**  

- Join us for the Poleng Loun for an evening prizes.
- Registration Challenge. S
- Want to learn Challenge? a [Training](#)

**2 DAYS 200 MILES**  
the San Francisco people living with

**Login**  
Username:   
Password:   
 Remember me? **Sign In**  
Forgot Password?

**Welcome Visitors**  
Register Now  
Sponsor a Participant  
Calendar of Events  
Find a Training Ride  
About The Event  
Crew & Volunteers  
FAQ  
About SFAF  
Tell A Friend

**Registered Participants**  
Find a Training Ride  
Fundraising Tips  
Training  
Nutrition  
Seismic Partners  
Tell A Friend

Thank you for your interest in the Seismic Challenge.

Just fill in the fields below to be added to our email list; you'll receive updates about information meetings, special events and more!

I heard about the Seismic Challenge through:

Other:

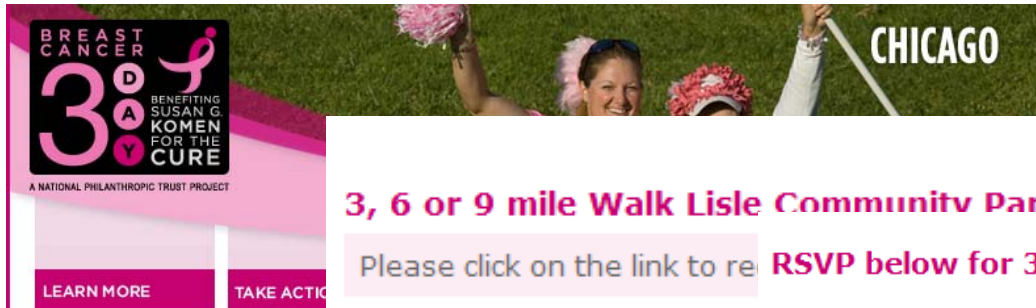
Please provide your contact information to receive news and updates from The Seismic Challenge:

\* Name:     
\* Email:

*The Seismic Challenge uses your email address to communicate with you in the most cost effective way. Your request for information about the Seismic Challenge will not result in any solicitations. For more information, please see our [privacy policy](#).*

Address Line 1   
Address Line 2   
City   
State/Province

# Innovative Recruitment Personal Events Example



**BREAST CANCER 3-DAY WALK**  
 BENEFITING SUSAN G. KOMEN FOR THE CURE  
 A NATIONAL PHILANTHROPIC TRUST PROJECT

**CHICAGO**

LEARN MORE TAKE ACTION

## 3, 6 or 9 mile Walk Lisle Community Park

Please click on the link to **RSVP below for 3-Day Training Walks!**

Training Walk Leader: Je

## 3, 6 or 9 mile Walk Lisle Community Park

Location:

### Your RSVP Information

Please complete the following information. Note that, for purposes of communication, your email address will be available to the host for this training walk.

\* Name: Title [v] First [gail] Middle [ ] Last [lighting] Suffix [v]

\* Email: [lfermanis@convio1.com]

Street 1: [asdf]

Street 2: [ ]

City/State/ZIP: City [asfd] State [CA v] ZIP [90069]

Country: [United States v]

\* Phone Number: (XXX-XXX-XXXX) [asdf]

Would you like to receive an email reminder for this training walk?  
 Yes, email me a reminder [1 day before the Event v]

Results are sorted by distance from location. To refine your search, try a wider date range, or the start and end dates of your search.  
[Search for a Training Walk](#)

Location: [60067] Radius: [200 r]  
 Date Range: [ ] To [ ]

**Search Results**  
 Records 1 - 16 of 16 [First](#) | [Previ](#)

Name	Loc
<a href="#">3, 6 or 9 mile walk Lisle Community Park</a>	Lisl
<a href="#">3, 6 or 9 mile Walk Lisle Community Park</a>	Lisl
<a href="#">Last Chance 3 or 6 mile walk</a>	Lisl
<a href="#">Batavia 4 miles on the Fox River</a>	Bat 605
<a href="#">9.5-Mile Forest Preserve Training Walk</a>	Dar 605
<a href="#">9.5-Mile Forest Preserve Training Walk</a>	Dar 605
<a href="#">Evening Walk Along the Lake</a>	Chi 606

**Lisle Community Park**  
 We will walk a 3 mile loop th parking lot. If you can't mak 45-60 minutes and you can

### Attendee Code of Conduct

Training Walk Rules



# Innovative Recruitment Calendar Events Example

The screenshot displays a web interface for 'The Weekend to End Breast Cancer' event. The main header features the event logo and a banner with the text: 'After 5 years of The Weekend, it is a world leader in breast cancer research and care.' Below this, a secondary banner reads: 'Before The Weekend, The Princess Margaret was a top research hospital in Ontario.' The navigation bar includes links for 'Home', 'Register Now', 'Request a Brochure', 'Sponsor a Participant', 'Come to an Orientation', and 'Login'. The left sidebar contains sections for 'Welcome Visitors' (with links like 'Register Now', 'Request a Brochure', etc.), 'Registered Participants' (with links like 'Login', 'Come to an Orientation', etc.), and 'Additional Information' (with links like 'Crew Members', 'Volunteers', etc.). The main content area is titled 'RSVP for Foot Clinic - Oakville' and features a red circle around the 'First Name', 'Last Name', and 'Email' input fields. The event details are: 'Richmond Hill Sunrise Seniors Assisted Living Thursday July 17th, 2008 6:30-8:00pm'. The location is 'Sunrise Seniors Assisted Living | 9800 Yonge St Richmond Hill, Ontario L4C 0P5 upstairs in activity room'. The date and time are 'Date: Thursday, July 17, 2008 Time: 6:30 PM - 8:00 PM'. A note states: 'We're sorry, the deadline for registration is: [blank]'. The form includes a checkbox for receiving updates and a field for the number of guests. Below the form are five numbered questions: '\*1. Daytime Phone Number (including area code)', '\*2. Street Address', '\*3. City', '\*4. Province', and '\*5. Postal Code'. At the bottom of the form are 'Submit', 'Reset', and 'Cancel' buttons.

# Innovative Recruitment Avenues



Canadian Cancer Society  
Société canadienne du cancer



You are visiting Canada-wide

Choose province/territory ▼

www.cancer.ca • About us • Contact us • Français

www.cancer.ca About us Contact us Français DONATE ONLINE

ABOUT CANCER PREVENTION CANCER RESEARCH SUPPORT/SERVICES HOW YOU CAN HELP PUBLICATIONS

Welcome Lynn!  
My Relay centre  
Edit my profile  
Log out  
Find an event  
Event home

Participant centre  
Username:  
Password:  
 Remember me?

My Relay centre  
Edit my profile  
Log out  
Find an event  
Event home

My interests | All > Personal stories > Interests: why I Relay  
Add to My interests  
Why I Relay  
Saturday, July 12, 2008  
By: Anne Drolet

Why I Relay  
Saturday, July 12, 2008  
By: Anne Drolet

Search:  Go

Mike's story

Get involved  
Create a new team  
Join an existing team  
Join the Survivors' Lap  
Register as a volunteer  
Make a pledge  
Buy a luminary  
Share your story: Why I Relay  
Get your company involved

Privacy

friends I have whose lives have been personally touched by this disease.  
I Relay to honour and support, in a practical way, the excellent work the Canadian Cancer Society does thanks to the hard work of volunteers and staff across the country and the donations of people like you.  
I Relay with hope ...

I am so happy to be participating in the National Office staff Relay For Life this year. It's our first year...and it's a great opportunity for all of us as staff to get out and participate in this great Canadian Cancer Society event and support the Society in a different way.

## Your Homework...

- Create 1 new method that would offer participants engaging opportunities and encourage new visitors to give you their e-mail.

# Today's Objectives: Motivation

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

1. Create new and innovative recruitment avenues
2. Get participants more engaged; have a more complete picture of your participant base
3. Improve average fundraising percentage per participant
4. Effectively use TeamRaiser to retain participants through a better experience



# Motivating your Participants

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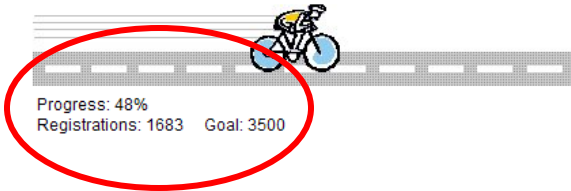
## Communicate *beyond* a one-way *informational* relationship!

- Communicate to the new visitors based on their avenue of interests and encourage them to register.
- Use the responses to registration questions to communicate to participants as unique individuals:
  - ▶ A past participant VS a new participant
  - ▶ A survivor VS friend/family member of afflicted VS someone who cares
  - ▶ Ask if they would like to share their contact information with other participants
- Use the profile functionality to list potential interests of the participant once they are a registered user:
  - ▶ Are you interested in Training Walks
  - ▶ Are you interested in Fundraising workshops
  - ▶ Are you interested in Meeting other participants
  - ▶ Are you interested in our Newsletter

# Motivating your Participants

## Foster Healthy Competition

### Bike MS: Valero Bike to the Beach



**Corpus Christi Kick-Off Party  
@ Brewster Street Ice House**

**Saturday, July 26  
11:30 a.m. – 1:30 p.m.**

### KICK-OFF PARTIES

Kick-Off Parties - a place where you can MAKE A SPLASH and Join a Team, Start a Team, Register as an Individual Rider, Register as a Volunteer & Learn more about the Society!

San Antonio \* 6 8 p.m. July 23 \* [Valero Energy Corporation](#) Join us for the 2008 Valero Bike to the Beach Kick-Off Party presented by VISTA Infusion. Wear your best beach attire for the party or come as you are. We will have plenty of activities for the whole family including sponsor exhibits, team tables, spin bikes, and a kids-area donated by YMCA. Special thanks to

**THE RIDE TO CONQUER CANCER**  
BENEFITTING THE PRINCESS MARGARET

**Campaign Progress**

Goal: \$1,700,000.00  
Achieved: \$104,274.50  
6%

[Donate to Event!](#)

**Top Teams**

- Concordia Cycling Team \$1,385.00
- Team Seb Cennamo \$1,226.00
- Blazing Saddles \$1,220.00

[Stop] [Start]

**Top Fundraisers**

- Hilary Trammell \$1,015.00
- Peter Ray \$1,000.00
- Mike West \$1,000.00

[Stop] [Start]

**TOP FUNDRAISERS**

- Kevin Sullivan
- Eric Innes
- Gordon Tozer
- Carlo DeGasparis
- David LeGresley
- Sam Panzures
- Tim Hockey
- Rick Doktor
- Keith Ambachtsheer
- Nicola Di Battista

**TEAM RANK**

- The Bauer - Zimmering Pacesetters
- The Cyclones
- Steve's Cycle Paths
- Team Surge On
- TEAM INNES
- Amby's International Aces
- Geared for Life
- Team Why Not?
- Pedal Pushers
- "A-TACC" Team

[More Teams](#)

Use the Top Ten fundraising Status indicators to encourage participants raise more money.





# Motivating your Participants

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## Taking advantage of Participant Center

- **Congratulate**
  - ▶ On fundraising successes thru the participant center using conditionals that can change as an individual raises more money or hits certain milestones
  
- **Inform**
  - ▶ Keep participants abreast of exciting updates to maximize engagement.
  
- **Teach**
  - ▶ Fundraising skills and methods thru top Fundraising tips or an FAQ page.
    - Example: Encourage the use of personal URL by adding it to every communication medium – emails, personal sites (Facebook, MySpace pages), newsletters.

# Motivating your Participants

## Taking advantage of Participant Center

The screenshot shows the American Health Society (AHS) Participant Center interface. The header includes the AHS logo and the tagline "changing lives together". The navigation menu includes "GET INVOLVED", "ISSUES", "NEWS", "RESOURCES", "COMMUNITY", and "SUPPORT AHS". The main content area features a fundraising goal for the "11th Annual Step Towards Recovery" with a current goal of \$1,234.56 and a new goal of \$1,234.56. A congratulatory message reads: "Nice Job with raising \$500, you are half way to your Goal. Keep up the Great work!!!!". A yellow box highlights the text "Your Homework... Create 3-4 unique questions in the registration process that will help you know the participant better."

•Wish a participant Happy Birthday!\*

\*You will need to ask for Birth date during the registration process and/or have it as a field to update in their personal profile.

# Today's Objectives: Action

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

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# Driving your Participants into Action

Focus Communications on action oriented messages with our TeamRaiser Scheduled Autoresponders.

TeamRaiser List | Cross-Event Teams | Registration Upsells | Uploads

**TeamRaiser List > Step Towards Recovery 2008**

**Process Navigator**

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. **Manage Autoresponders**
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL
13. Test Drive
14. Publish

This is a list of the Autoresponders available for the TeamRaiser. Click Preview to display the current version of an Autoresponder in a separate browser window. Click Edit to modify the sender name and return email address, stationery, subject line, and content. Click Switch to Default Version to revert to the Autoresponder defined in the AutoResponder Center, or Switch to Customized Version to create a version just for this TeamRaiser. Click Disable to send no AutoResponder.

- Autoresponders -

Autoresponder Types	Actions	Version to Send
Thank You for Forming a Team	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Thank You for Registering	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Someone has registered you	<a href="#">Revert to Site Default Version</a> <a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Sample Solicitation to Forward	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Thank You for Your Gift	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Offline Gift Thank You	<a href="#">Revert to Site Default Version</a> <a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Congratulations for Reaching 50% Goal	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Congratulations for Reaching Your Goal	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Someone Made a Donation on Your Behalf	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
Someone Joined Your Team	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
TeamRaiser First Follow Up	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
TeamRaiser Second Follow Up	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
TeamRaiser Third Follow Up	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
TeamRaiser Fourth Follow Up	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
TeamRaiser Registration Full Refund	<a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder
TeamRaiser Registration Partial Refund	<a href="#">Revert to Site Default Version</a> <a href="#">Switch to Customized Version</a>	Do Not Send this Autoresponder

Cancel << Previous Next >>

# Driving your Participants into Action

Focus communications on action-oriented messages with our TeamRaiser Scheduled Autoresponders.

TeamRaiser List | Cross-Event Teams | Registration Upsells | Uploads

**TeamRaiser List > Step Towards Recovery 2008**

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**2. First Followup Interval:**  
Defines the number of days after registration to send the first follow-up autoresponder message (leave blank to avoid sending automatically)

**3. Second Followup Interval:**  
Defines the number of days after registration to send the second follow-up autoresponder message (leave blank to avoid sending automatically)

**4. Third Followup Interval:**  
Defines the number of days after registration to send the third follow-up autoresponder message (leave blank to avoid sending automatically)

**5. Fourth Followup Interval:**  
Defines the number of days after registration to send the fourth follow-up autoresponder message (leave blank to avoid sending automatically)

TeamRaiser Registration Partial Refund | [Revert to Site Default Version](#) | [Switch to Customized Version](#) | [Do Not Send this Autoresponder](#)



# Driving your Participants into Action

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- Follow Best Practices for Autoresponders
  - ▶ 1<sup>st</sup> Instruct on how to get started by setting up their participant page
  - ▶ 2<sup>nd</sup> Tell them to get a donation today
  - ▶ 3<sup>rd</sup> Tell them to start a team and get a friend to register
  - ▶ 4<sup>th</sup> Event preparation information
  
- Replicate the Action Driven messages on the Participant centers
  - ▶ Not everyone reads their e-mail
  - ▶ Participant center is friendly reminder
  
- Get them involved in the pre-event months
  - ▶ Have a fundraising house party
  - ▶ Lead a training event
  - ▶ Reach out and meeting fellow participants

# Driving your Participants into Action

Set up Donation forms with levels higher than your average donation.

## Encourage donors to THINK BIG!!

The screenshot displays the Avon Walk for Breast Cancer donation interface. On the left is a navigation menu with links for 'What's it Like to Walk?', 'My Avon Walk', 'Introduction Meetings', 'FAQ', 'Tribute Book', 'Message Board', 'Avon Walk Shop', 'Press Center', and 'Tell a Friend'. Below the menu is a 'Breast Cancer Info' button and the text 'WALKS MAKE A DIFFERENCE'. The main content area features a 'Sign In' section with a 'username' field and a 'go' button, along with a 'Forgot Your Password?' link. Below this are buttons for 'Register', 'Crew', 'Make a Donation', 'Volunteer', and 'Request a Brochure'. The 'Make a Donation' section is active, showing a two-step process: '1 Gift & Payment Information' and '2 Review Gift'. Under '1', users are prompted to 'SELECT A GIFT LEVEL AND PAYMENT OPTION'. The 'Select a Gift Amount' section lists radio button options for \$1,000.00, \$750.00, \$500.00, \$250.00, \$100.00, and an empty input field. The 'Payment Options' section lists radio button options for 'Single Payment', '3 monthly payments', and '5 monthly payments'. A 'Calculate' button is positioned below these options. On the right side of the form, a list of gift descriptions is shown: 'Buys a Mammogram', 'Pays for a Wheelchair', 'Neuters a Dog', and 'Feeds a Cat'.

# Driving your Participants into Action

Repeat the levels in the registration process to encourage participants to start their fundraising immediately!!!

## Participation Options

Select one of the participation types below.

Select a Participation Type

<input checked="" type="radio"/> <b>Cyclist</b>	<b>\$95.00</b>
Cyclists commit to raise a minimum of \$2200 by Wednesday, September 17th, 2008 to participate in the Seismic Challenge.	
<input type="radio"/> <b>Crew</b>	<b>\$75.00</b>
Crew Members provide support for Cyclists during the Seismic Challenge. There is no fundraising minimum for Crew Members.	

Would you like to kick-start your fundraising by making the first donation towards your fundraising goal?

<input type="radio"/> Tremor	<b>\$100.00</b>
<input type="radio"/> Jolt	<b>\$250.00</b>
<input type="radio"/> Shockwave	<b>\$500.00</b>
<input type="radio"/> Earthshaker	<b>\$2,200.00</b>
<input type="radio"/> Additional Gift: <input type="text"/>	
<input type="radio"/> No Additional Gift	

Cyclists commit to raising a minimum of \$2200. What is your individual fundraising goal?

Your Fundraising Goal:



# Driving your Participants into Action

## ■ Report Writer

- ▶ Create custom report templates to run or alter at your leisure
  - Pick report type
    - Choose Columns to include
    - » Set Criteria/Filters

Viola, you have a new report

The screenshot displays the Convio Report Writer interface. On the left, a 'Process Navigator' shows the steps: 1. Select Report Type, 2. Configure Report Columns, 3. Select Sort Order, 4. Configure Filters, 5. Identify Report, and 6. Report Criteria Summary. The main area shows the 'Create a New Report' dialog box with a 'Filter' section containing 'Event is any' and 'Registration En'. Below the dialog, a 'Report Results' table is visible, showing a list of participants with columns for First Name, Last Name, Email, Registration Date, Additional Gift Amount, Participation Type Name, and Total Online Gifts.

Participant First Name	Participant Last Name	Participant Email	Registration Date	Additional Gift Amount(\$)	Participation Type Name	Total Online Gifts(\$)
Natalie	Weakley	natalie_weakley@panasonic.aero	10/5/07 7:54 PM	0.00	Crew	0.00
Tammie	Turpen	aniba59@hotmail.com	10/5/07 9:01 PM	0.00	Walker	550.00
Kallie	Zaitz	kalliezaitz@yahoo.com	10/6/07 6:54 AM	0.00	Walker	927.00
William	Scott	wscott@comcast.net	10/7/07 4:20 AM	0.00	Crew	0.00
Samantha	Ritter	samantha.ritter@hotmail.com	10/8/07 10:43 PM	0.00	Crew	0.00
Jennifer	Lizotte	jmlizotte@yahoo.com	10/9/07 4:45 AM	0.00	Walker	890.00
Mary	Zimniewicz	maryz99@earthlink.net	10/9/07 6:45 PM	0.00	Crew	0.00
Lisa	Rowe	lisa.rowe@redlion.com	10/10/07 12:08 AM	0.00	Walker	0.00
Nancy	Chabot	nancy_chabot@hotmail.com	10/10/07 5:38 AM	0.00	Walker	0.00
Stacey	Gerrish	fuzzduds@aol.com	10/10/07 3:20 PM	0.00	Walker	2092.00
Genine	Wood	ggwood@johnstscott.com	10/14/07 5:59 AM	0.00	Walker	565.00
Renee	Taylor	renee@rapsallion.com	11/12/07 10:40 PM	0.00	Walker	0.00
Lucie	Arrell	matt.lucie97@earthlink.net	2/19/08 12:53 AM	0.00	Walker	0.00
Karen	Crowe	kcscrowesnest@yahoo.com	10/5/07 5:12 PM	0.00	Walker	1135.00
Jennifer	Waters	jenwaters@verizon.net	10/5/07 5:29 PM	50.00	Walker	3960.00
Don	Burrows	donald.burrows@comcast.net	10/5/07 5:32 PM	0.00	Walker	2070.00
Julia	Reed-Voldal	jrcelstai@yahoo.com	10/5/07 5:35 PM	0.00	Crew	350.00
Dorrene	Ross	dross@stanford.edu	10/5/07 5:36 PM	0.00	Crew	0.00
Maureen	Sprague	mospagiri@verizon.net	10/5/07 5:39 PM	0.00	Crew	0.00



# Driving your Participants into Action

Use Tasks to identify where the bulk of your participants reside and drive them to the next level

Logged in as: System Administrator | Logout | Preferences | About | Support | Login As Admin | Change Convio Admin Password

Home | Content | Fundraising | Advocacy | Email | Constituent360 | Library | Data Management | Setup | Help

Reports | Admin on demo800

CONVIO

Task List

To Do List | Task List | Recurring Task

Create a New Task

Records 1 - 10 of 69 | First | Previous

Task	Actions
<a href="#">AAA - Categorize all groups</a>	Edit Delete Activate Run
<a href="#">AAA - update CA constituent category</a>	Edit Delete Activate Run
<a href="#">AAA - update NY constituent category</a>	Edit Delete Activate Run
<a href="#">AAA - Update TX constituent category</a>	Edit Delete Activate Run
<a href="#">AAA - update uncategorized constituents</a>	Edit Delete Activate Run
<a href="#">Advocacy Issues (1204) Opt Ins</a>	Edit Delete Activate Run
<a href="#">Advocacy Issues (1204) Opt Outs</a>	Edit Delete Activate Run
<a href="#">Advocacy Issues (1205) Opt Ins</a>	Edit Delete Activate Run
<a href="#">Advocacy Issues</a>	Edit

**Select contacts based on team membership?**

- Include team captains.
- Include team members.
- Include individual participants.

**Select contacts based on company membership?**

- Include company teams.
- Include teams with no company affiliation.

**Select contacts based on number of donations raised?**

Number of donations raised greater than or equal to:

Number of donations raised less than:

**Select contacts based on dollar amount raised?**

Dollars raised greater than or equal to (whole dollars):

Dollars raised less than (whole dollars):

**Select contacts based on number of e-mails sent?**

Number of e-mails sent greater than or equal to:

Number of e-mails sent less than:

**When should I update this group?**

Update once a day  Update once a week

Start with registrations this many days old (blank = from the beginning):

**Your Homework...**

- Write compelling content for you follow-up Autoresponders
- Create a few tasks that will track the masses.



# Today's Objectives: Loyalty

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

1. Create new and innovative recruitment avenues
2. Get participants more engaged; have a more complete picture of your participant base
3. Improve average fundraising percentage per participant
4. Effectively use TeamRaiser to retain participants through a better experience



# Retaining Your Participants

- **Make it easier to come back**
  - ▶ **Associate to previous year's event:**

The screenshot shows a web-based configuration interface for a TeamRaiser. On the left is a vertical navigation menu with 14 items: 3. Select Event Options, 4. Select Team Options, 5. Associate Upsells, 6. Manage Participation Types, 7. Manage Discounts, 8. Manage Stationery, 9. Manage Autoresponders, 10. Customize Suggested Messages, 11. Customize Pages, 12. Customize Event URL, 13. Test Drive, and 14. Publish. The main content area is titled '2. Public Name:' and contains several sections: '3. Security Category:' with a dropdown set to 'General'; '4. Event Date:' with dropdowns for 'Sep', '18', and '2008'; '5. Fiscal Year:' with a dropdown set to '2008'; and '6. Previous Event Association:' which is highlighted with a red box. This section includes a description: 'Links this event to a previous event to provide returning participants with access to their Personal Page and donation history (Note that this will provide additional report data as well)'. Below the description is a dropdown menu with the following options: 'Step Towards Recovery 2007', 'No Event Selected', 'Bike Ride 2007', 'House Parties 2007', 'Step Towards Recovery 2007' (highlighted), 'Test', 'Virginia Steps for Recovery 2008', 'Virtual Walkathon', and 'zzLara's Teamraiser to test some features'. Below the dropdown is section '7. Event Type 2:' with a radio button selected for 'Choose an existing value' and a dropdown menu. Below that is section 'Event Type 3:' with a radio button selected for 'Choose an existing value' and a dropdown menu. At the bottom are buttons for 'Cancel', '<< Previous', and 'Next >>'. The 'Step Towards Recovery 2007' option in the dropdown is highlighted in blue.

## Participant will retain:

- **Personal Page content**
- **Address Book**
- **E-mail Content**
- **E-mail Stats**

# Retaining Your Participants

- **Make it cost effective and important**
  - ▶ Offer a 2 for 1 registration fee to raise participation
  - ▶ Sell or give a unique shirt to returning participants
  - ▶ Offer lower registration fee for returning participants thru discounts

The screenshot displays the Convio TeamRaiser Administration interface. The main content area is titled "TeamRaiser Administration" and shows the "Step Towards Recovery 2008 > Returning Participant" configuration page. A yellow callout box is overlaid on the page with the text "Your Homework..." and two bullet points: "Think of returning participant incentives" and "Test the discount functionality".

The interface includes a "Process Navigator" on the left with the following steps:

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
  - a. Identify Discount
  - b. Define Type and Amount
  - c. Limit Number Available
  - d. Define Eligibility
  - e. Approve Discount
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages

The main content area shows the "1. Discount Usage:" section with the following text:

1. Discount Usage:  
Determines if registrants may use this discount one time only  
 Yes, each registrant may use this Discount one time only

2. Eligible Groups:

At the bottom, there is a table with the following data:

Name	Type
Step Towards Recovery/25-1241	Donation Groups
Step Towards Recovery/\$25 Level	Donation Groups

## Session Summary

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TeamRaiser is like a sports car...

If you put the right gas in it  
&  
drive it like it's designed,

**It Will Perform for You!!!!**

# Summary of Your Homework and Next Steps

- Create unique ways to communicate to participants
  - ▶ Offer a variety of options to keep participants engaged and encourage new visitors to get involved
- Ask questions that will give you information about individuals
  - ▶ Through additional registration questions
  - ▶ Offering up Interest options in the personal profiles
- Communicate, and monitor progress
  - ▶ Create motivating content for follow-up Autoresponders
  - ▶ Structure donation forms to ASK BIG!
  - ▶ Monitor the masses to move them forward
- Create loyalty
  - ▶ Think of returning participant incentives
  - ▶ Give past participants other fundraising opportunities, like Tributes





## Q & A

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

Please take a minute to answer our two poll questions about today’s session.





# Thank you!

You can access these slides in our online Community at:  
<http://community.customer.convio.com/community/webinars>

*The recording of this session will be posted within 7-10 business days.*

And register for our next Webinar:  
***Effective Online Marketing 101.2:***  
*Building & cultivating your housefile*

