



Effective Online Marketing 101.2:

Building and cultivating your housefile

Kenan Pollack and Adam Lemmon
Convio Client Success Services



About Us



Kenan Pollack

Senior Interactive Consultant

- Twelve years experience in 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, Mobile Loaves & Fishes



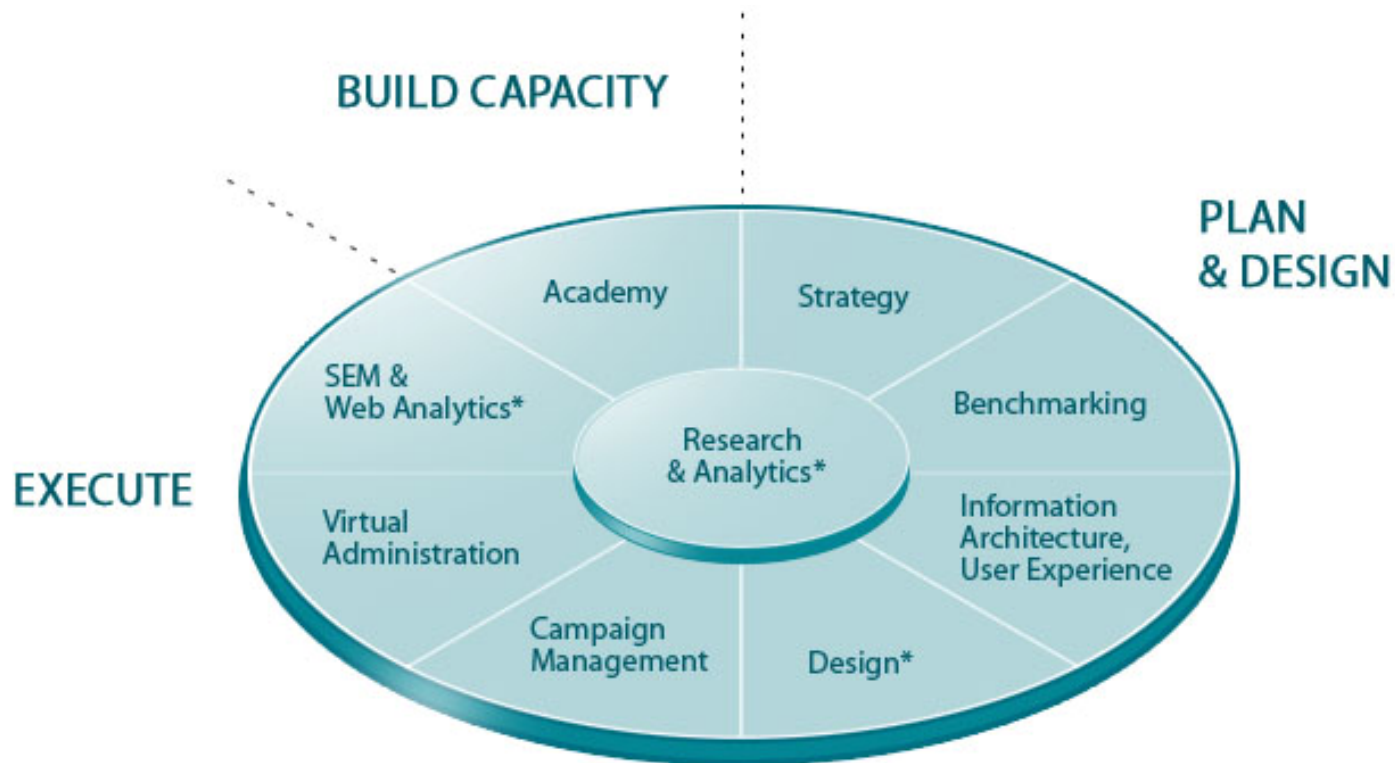
Adam Lemmon

Senior Interactive Specialist

- Three years with Convio training team (product training for Convio clients)
- Non-profit website management experience with Aiesec (International Student Exchange)
- Client list includes those in the Convio Go! Program: Yellowstone Park Foundation, American Near East Refugee Aid, Mitoaction, Gillette Children's Foundation

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



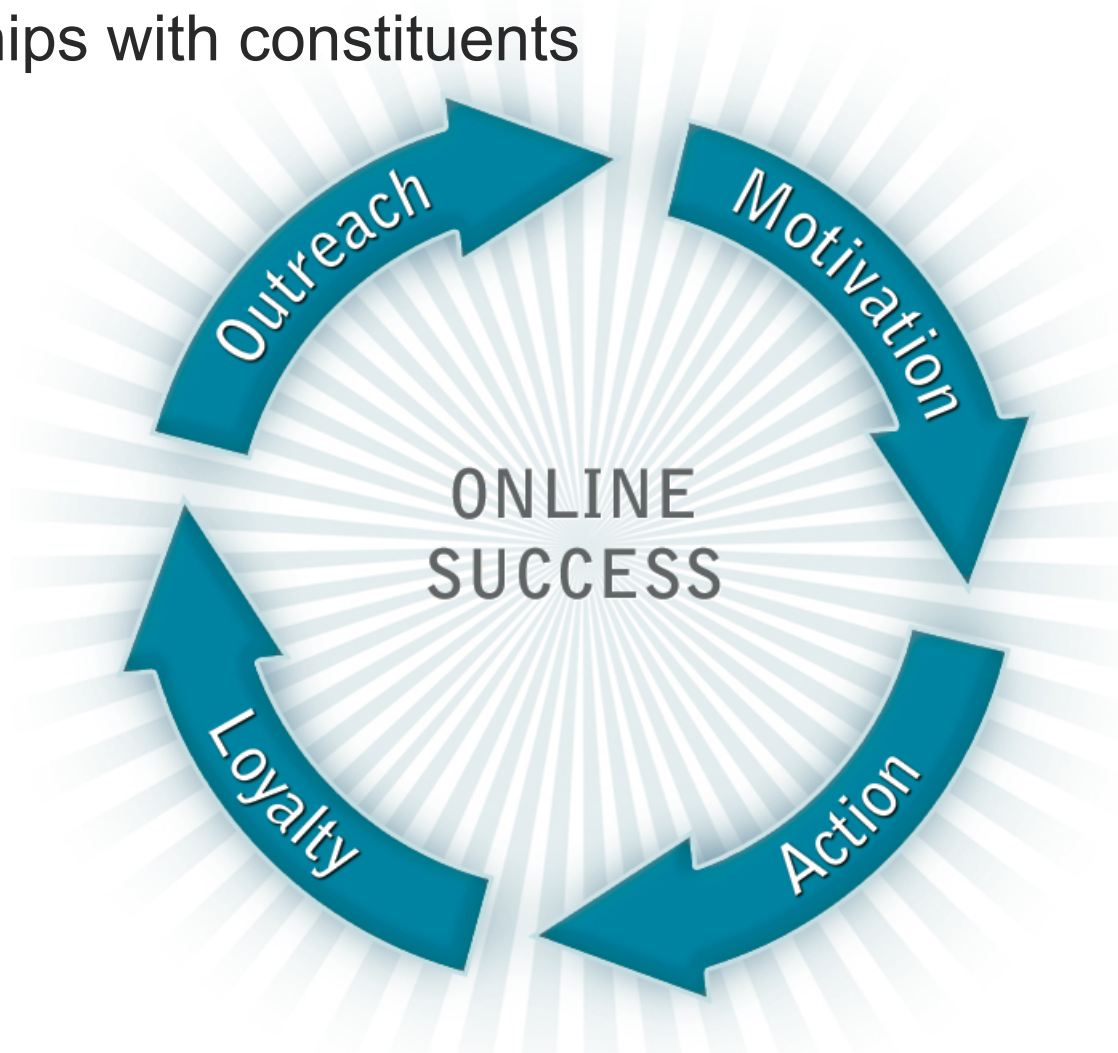
* Utilize specialized partners

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

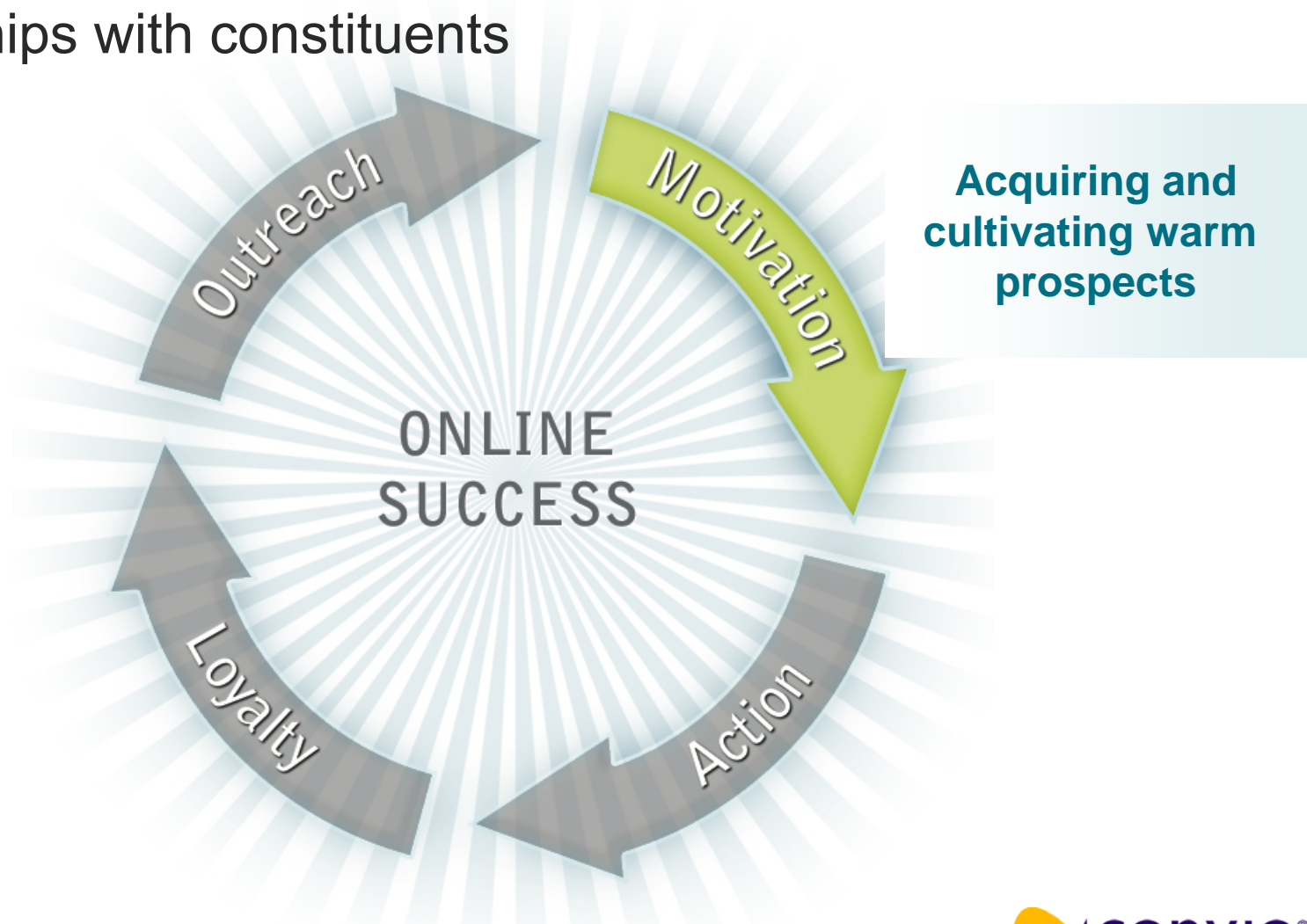
eCRM is the practice of using the Internet to build life-long relationships with constituents

Strategically
drawing traffic
into your site



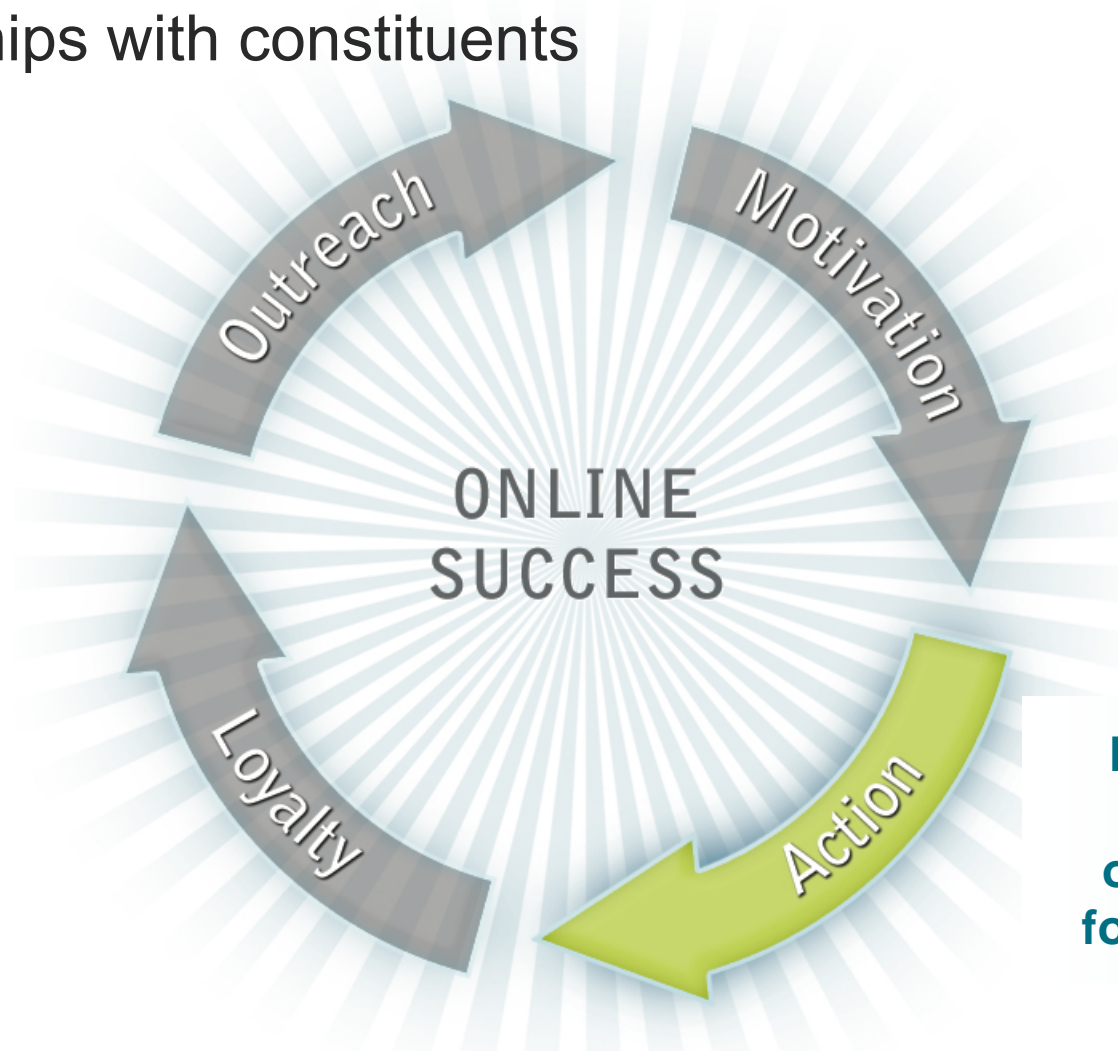
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Relationship Building Framework: eCRM

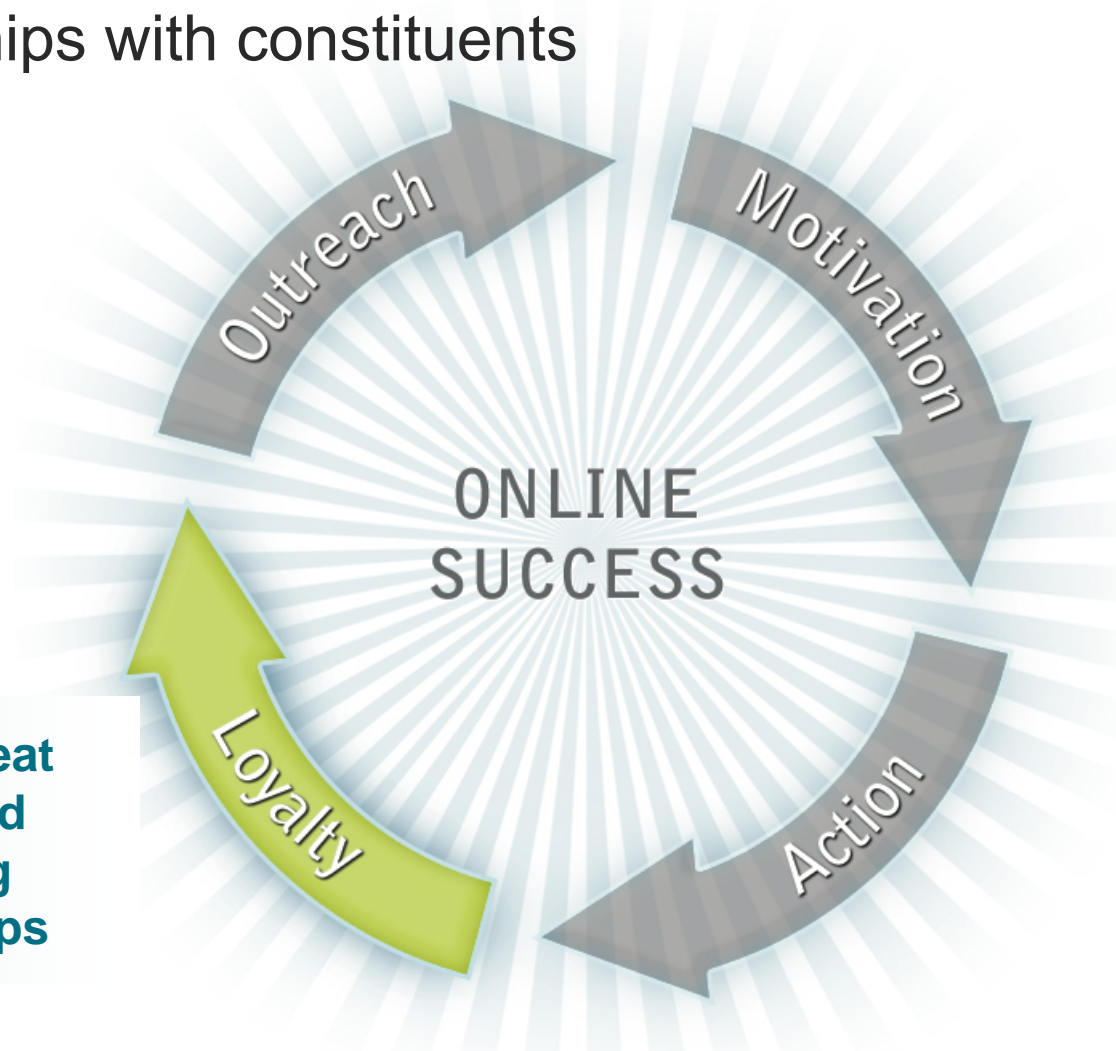
eCRM is the practice of using the Internet to build life-long relationships with constituents



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. Understand the basics of building your email list (housefile)
2. Evaluate various housefile-building opportunities
3. Welcome new constituents into your online program
4. Start planning initial tactics and strategies to grow your organization's email housefile



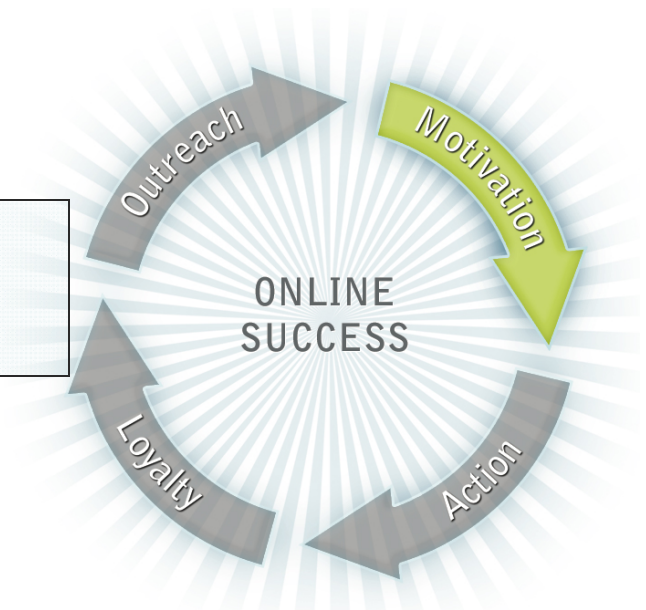
Your Homework...

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

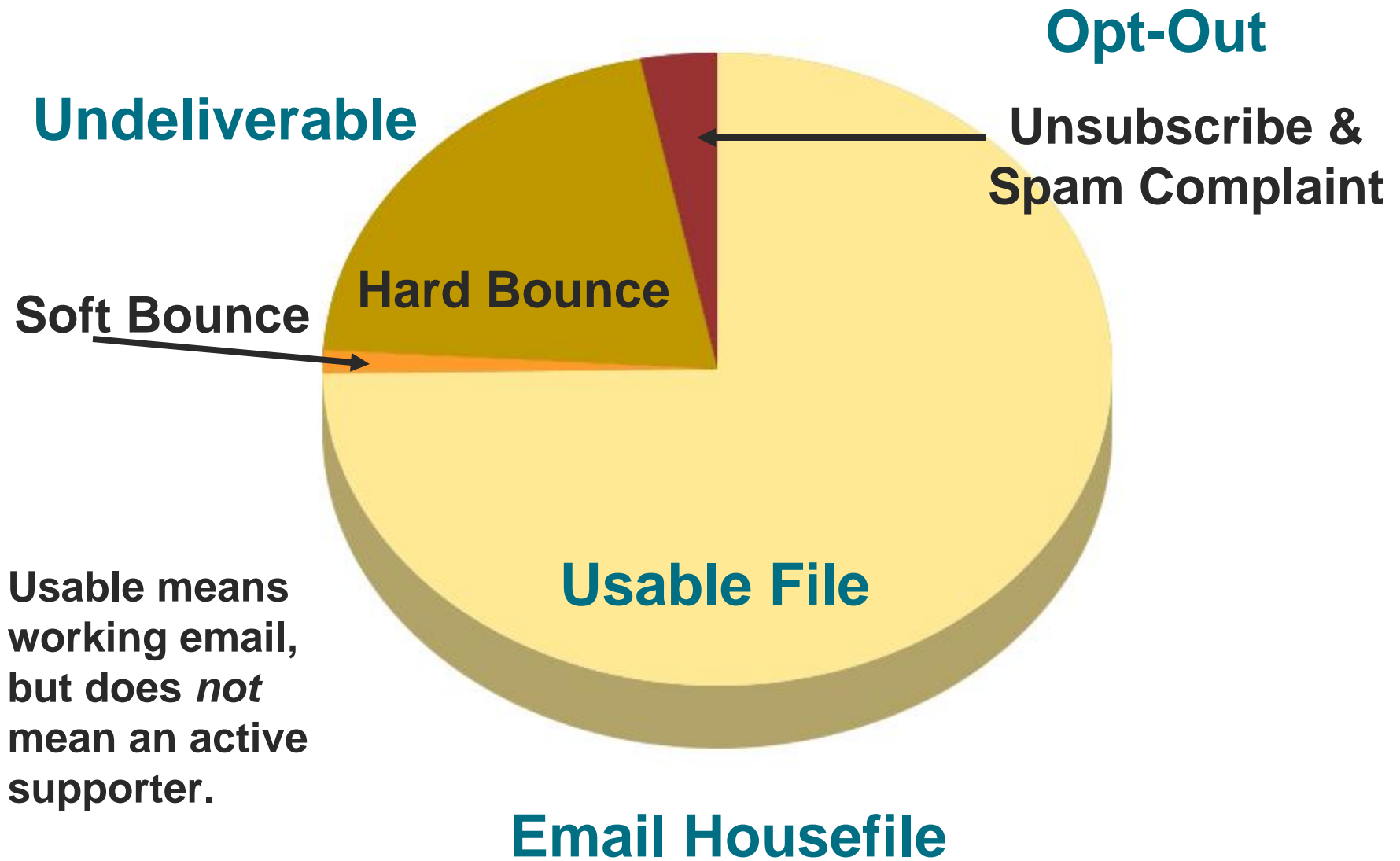
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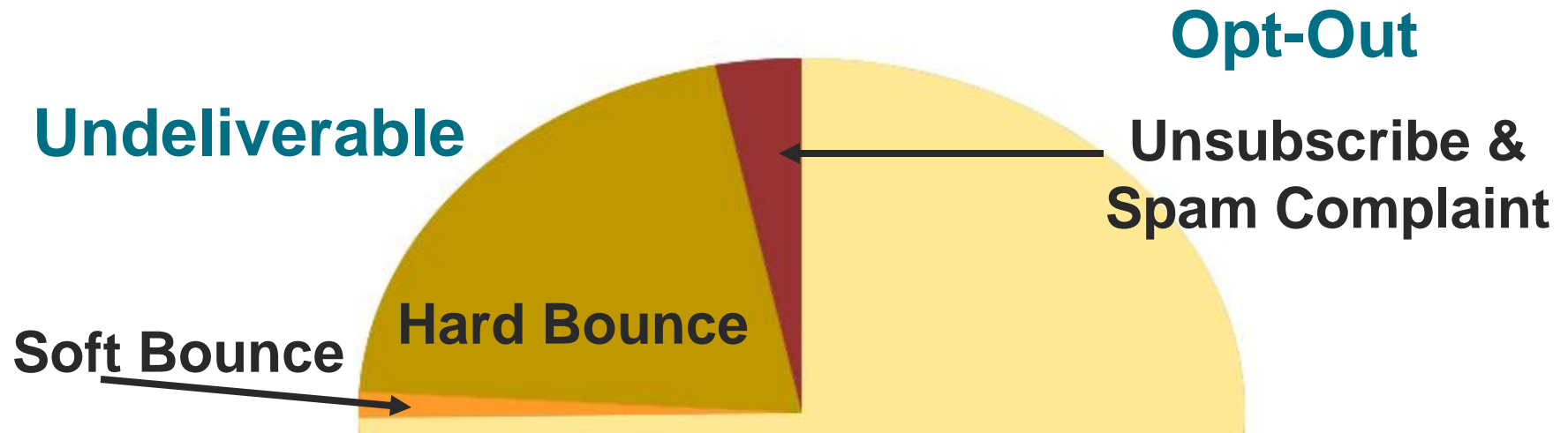
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Basics: Housefile Terms & Definitions




Basics: Housefile Terms & Definitions



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

Group Hierarchy

Constituent360 → Groups → Any Registered User → Edit

Basics: Housefile Terms & Definitions

Deliverability: Ensuring that an email you send safely arrives in your supporter's inbox.

How does Convio achieve this...

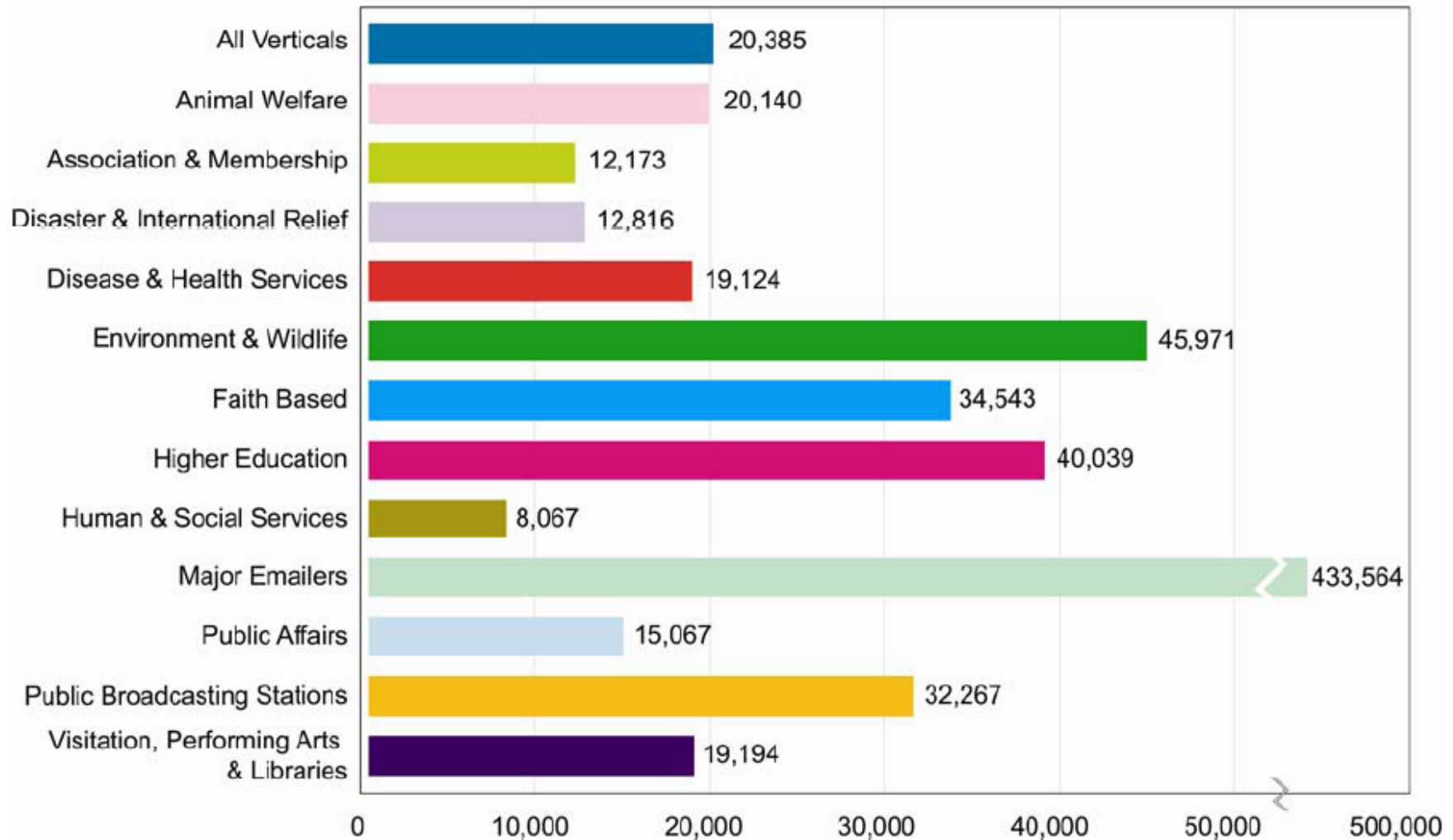
- “Whitelisted” at major ISPs/ESPs (AOL, Yahoo, etc.)
- Strong ISP relationships
- Automatic compliance with “bounce” management standards
- Separate clients by deliverability risk level

Here's what you need to do:

- Follow permission-based marketing rules; honor your constituent's requests
- Provide compelling content and reason to join

Non-Profit Email File Size Trends

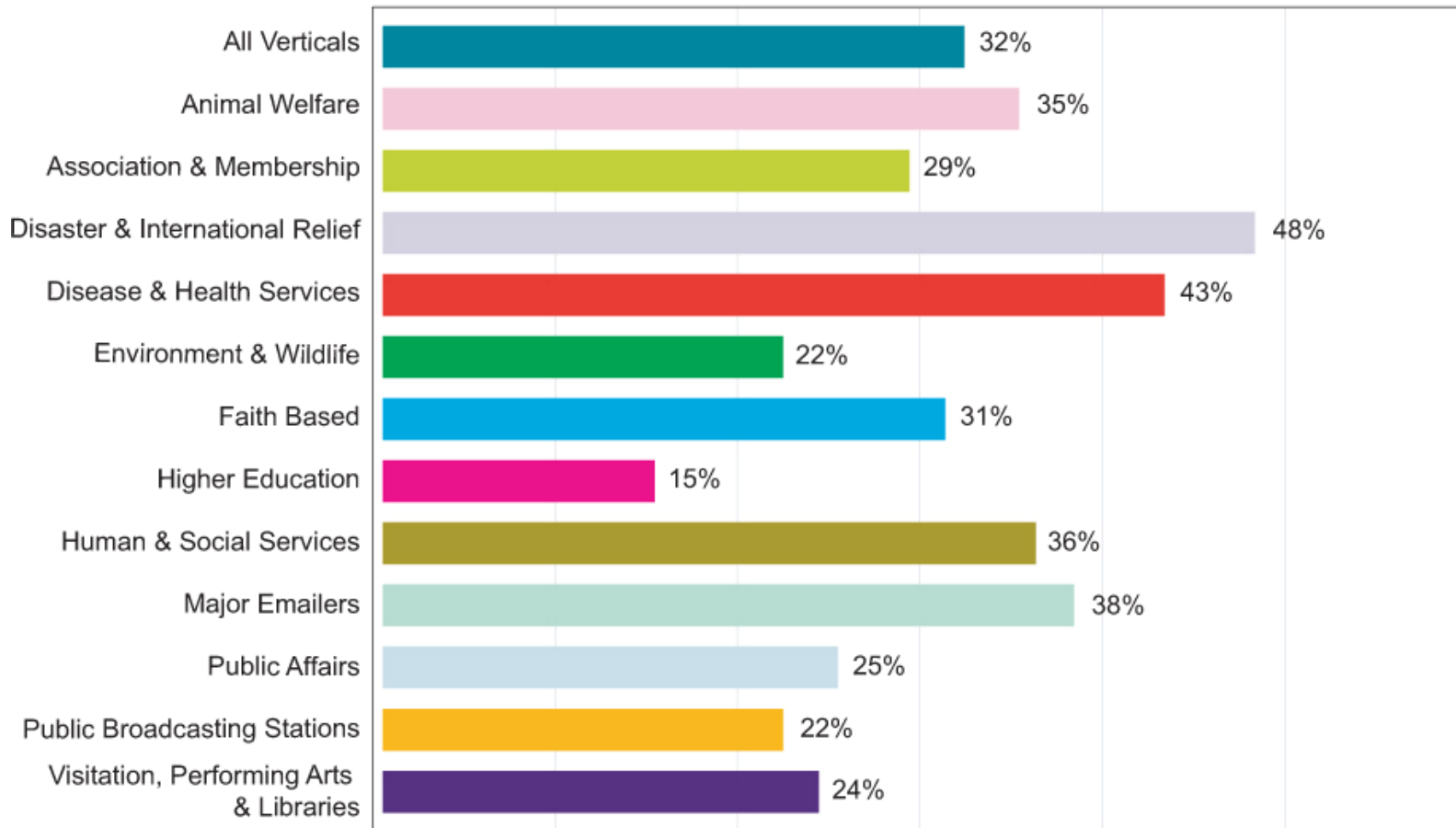
Median Housefile Size as of June 30, 2007, n = 419



Non-Profit Email Growth Trends

Email File Year-Over-Year Growth by Vertical

Median Email File Size Change from from July 2005 - June 2006 to July 2006 - June 2007, n = 221



Your Homework...

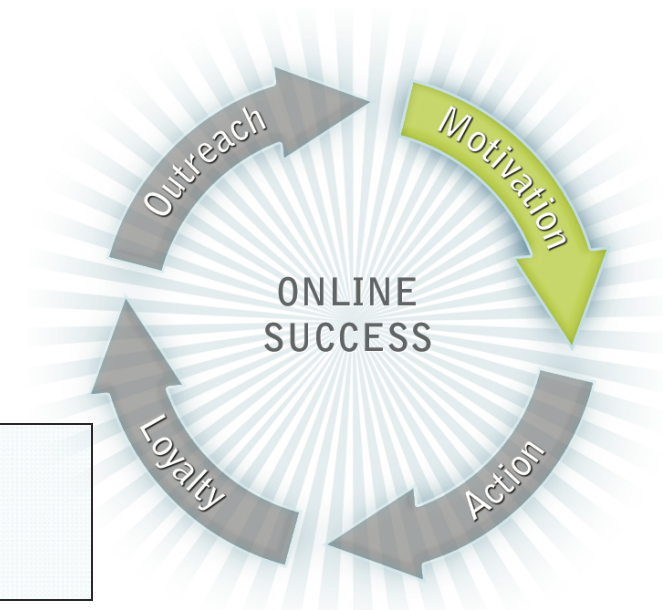
- ▶ Download the Convio Online Marketing Nonprofit Benchmark Index™ Study:
<http://community.customer.convio.com/docs/DOC-1555>

60%

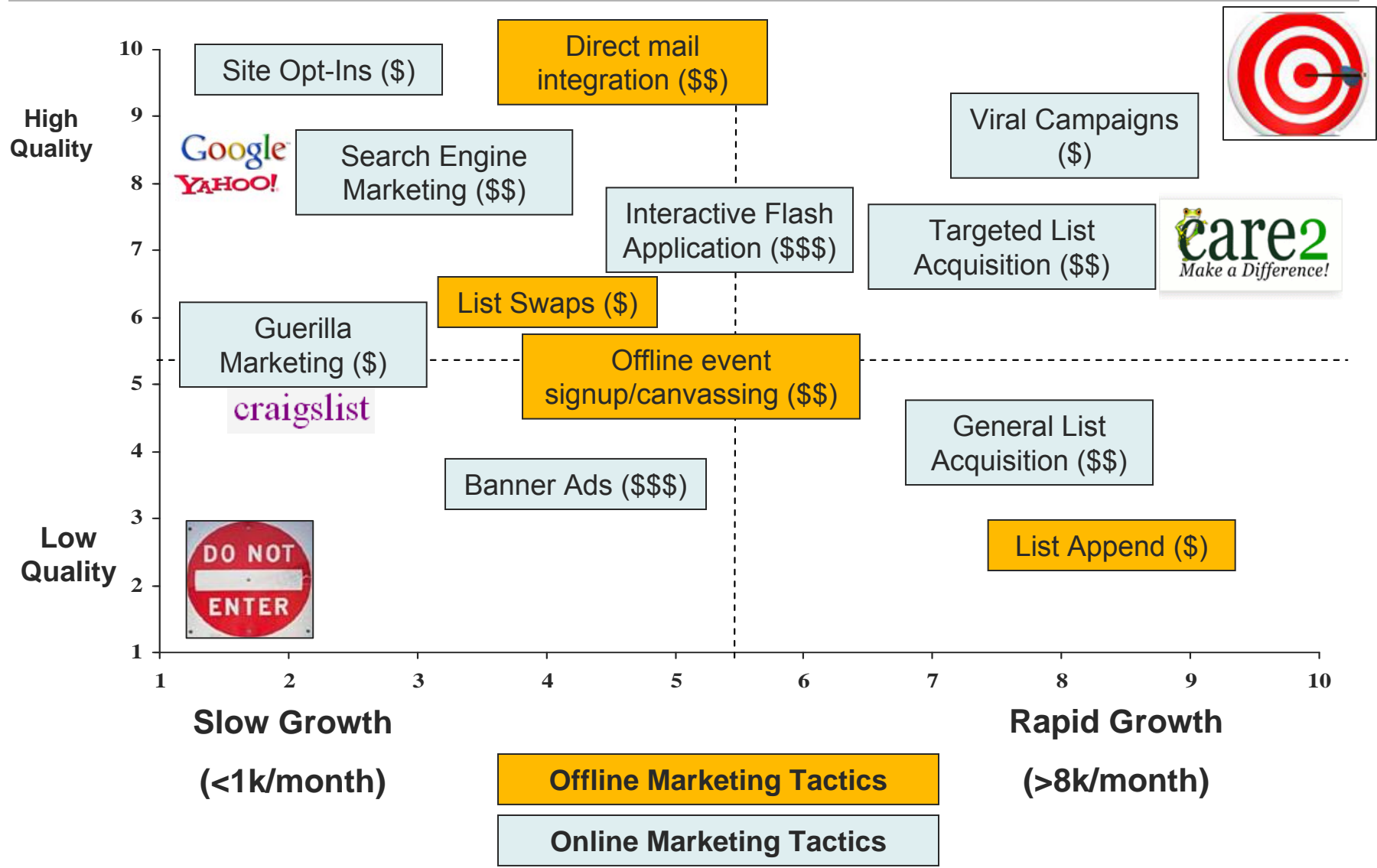
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Sources to Build Your Housefile



Site Opt-ins

- Are sign-up opportunities prominently placed on your site?
- Do you have one or more opt-ins on your homepage?
- How are your opt-ins positioned?

STRENGTH LEGEND | **YOUTH HOME** | FAMILY MINISTRIES | SHAPING MEN OF CHARACTER SINCE 1961

PAUL ANDERSON

Join Our Community of Strength
What does this mean? [Click here to learn more >](#)
Log In | or Join: Enter Email Address **GO**

Home | About PAYH | **Donate** | Alumni | Anderson's Harvest | Success Stories | Contact Us

[Print this page](#)
[Email this page](#)
[Bookmark this page](#)

CONNECT WITH PAYH

Monthly Newsletter >
 Parenting Tips
 Strength for the Day >

Enter Email
Submit
[Find Out More >](#)

APPLY FOR ADMISSION

[Social Summary Form >](#)
[Medical Form >](#)
[Learn more](#) about how to apply for admission to the PAYH.

President Ronald Reagan said:

"You opened a door not for yourself but for young people who were homeless and misguided. Thousands of young people have, thanks to you, been provided with a Christian homelike environment."

Find out more >

SHAPING MEN

The Paul Anderson Youth Home (PAYH) is a Christian residential home for troubled youth. Since 1961, we have been shaping men of character. Our desire is to offer a fresh start for troubled teenagers who need to change their lives and have reached a "dead end." For parents in crisis, the PAYH is a sanctuary.

MISSION STATEMENT

Depending upon God's Divine guidance, as a Christian rehabilitation facility for troubled young men we:

- Plant God's Word in their lives.
- Encourage their mental, physical, spiritual, and social growth, based on Luke 2:52
- Help them understand a personal relationship with Jesus Christ.
- Provide opportunities for them to become assets rather than liabilities...givers rather than takers.
- Instill a strong work ethic.

UPCOMING EVENTS

Sept. 25th - Oct. 2nd
[Paul Anderson's Cycling Challenge](#)

[Click here to read last year's blog and view videos on the ride!](#)

POWERED BY **CONVIO**

Paul Anderson | Youth Home | Family Ministries | FAQ | Contact Us

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Site Opt-ins: Creative Sign-Ups

raise your hand
TEXAS

WHO WE ARE THE FACTS LEGISLATIVE PRIORITIES WHAT YOU CAN DO MEDIA **SEND TO A FRIEND**

80th Texas Legislative Session
Raise Your Hand Texas
2007 Gold Star Recipients **SEND THEM A "THANK YOU"**

ADD YOUR VOICE TO OUR ONLINE STATEMENT OF SUPPORT AND RECEIVE A FREE BUMPER STICKER.

Support Public Schools
raiseyourhandtexas.org

First Name* _____
Last Name* _____
Email* _____
Zip/Postal Code* _____

Yes, send me updates on how I can get involved

*Denotes required entry. **ENTER**

Stronger Schools. Brighter Futures.

Texas is recognized nationally as a pioneer in public school reform. While we have made significant progress, there is still work to be done. We should not stop now. We need to continue to invest and, at the same time, expect more from our investment. We must work together to continue to celebrate, defend and strengthen our public schools. We must raise our hands, lend our voices and show our support.

TELL A FRIEND, GET A FREE T-SHIRT

FIND OUT HOW

Clear call to action increases registration rate

Bumper sticker motivates completion of second step

Site Opt-ins: Phased Registration



Texans have raised their hands for stronger schools and brighter futures.

WHO WE ARE WHAT WE BELIEVE WHAT YOU CAN DO MEDIA [SEND TO A FRIEND](#)

Raise Your Hand For Public Schools

Please provide your complete contact information to receive your free bumper sticker:

Title:

* First Name:

* Last Name:

* Email:

* Street 1:

* City:

* State / Province:

* ZIP / Postal Code:

Yes, send me newsletter and email updates

The following questions are optional, but will help us get organized to advocate for stronger schools.

As we build support for our education initiatives, we want to reach out to a broad cross section of Texans. Please check all of the below that apply to you.

I am a ...

Parent with children attending Texas public schools

Grandparent with grandchildren attending Texas public schools

Teacher in Texas public schools

Business Owner

Working Professional

Community Leader

Concerned Texas Resident

I would be willing to ...

Write a letter to the editor of my local paper about education reform

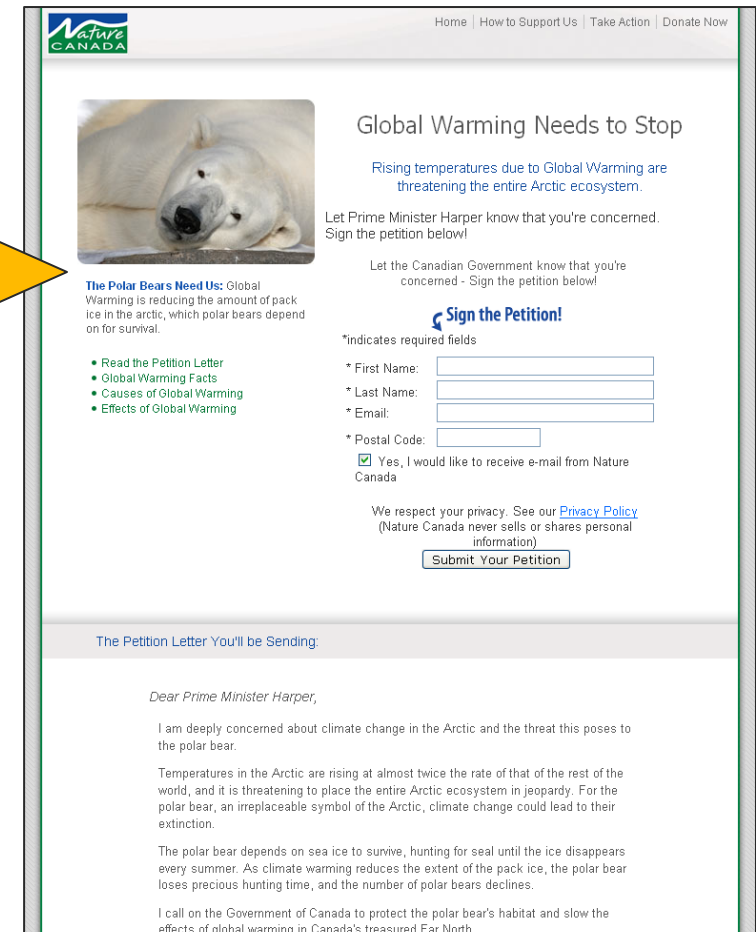
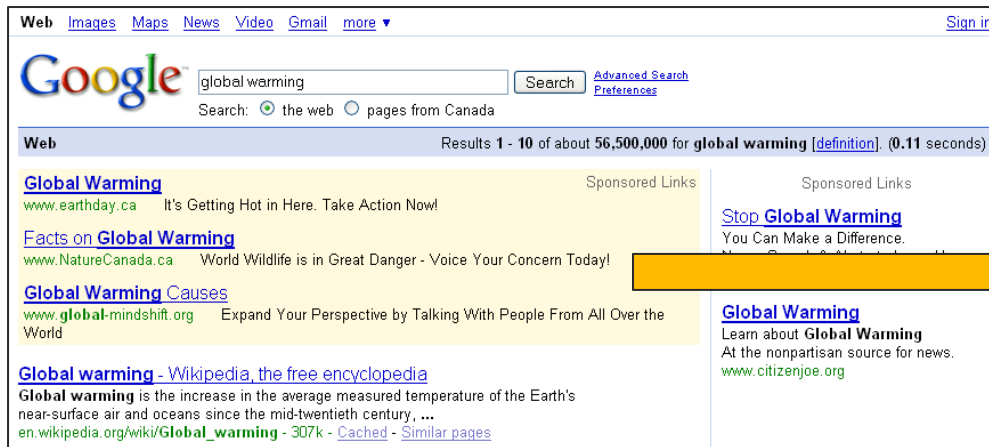
Contact a state legislator about education issues

Organize a house party to support education reform

Speak about education reform at events in my community

- Phased registration increases likelihood of capturing key information
- Expect 40-60% completion rate of second step
- Premium increases likelihood of sign-up & viral outreach
- Opportunity to capture additional profile information

Search Engine Marketing: Petition/Pledge



- With a Google Grant, goal is to maximize use of budget, not necessarily minimize cost
- \$10K grant should generate 20-40K clicks per month if fully spending the grant
- 20-40K clicks can generate 400-1,000 new constituents per month *who are aligned with your cause*

Your Homework...

- ▶ Apply to the Google Grants program:
www.google.com/grants

Viral Campaigns: Giveaways

Gala Giveaway Example

- Part of a larger campaign to promote the Cleveland Foodbank's annual event.
- Free to enter
- Constituents "earn" additional entries by sending viral eCards

Your Homework...

- ▶ Begin planning a simple viral campaign



The vital link between food and hunger

Donate Now

- About Us
- Financial Donations
- Food Donations
- Volunteer Opportunities
- Advocacy
- Harvest for Hunger
- Member Agencies
- Newsroom
- Related Resources



How good are your odds of winning?

You decide!

Not yet entered in our drawing?

Please confirm or enter your contact info:

* First Name:

* Last Name:

* Email:

* Street 1:

Street 2:

* City:

* State / Province:

* ZIP / Postal Code:

* Phone Number:

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

The winner will be contacted by phone - please provide a number where we can reach you.

When you enter, you'll receive updates from the Cleveland Foodbank on how to fight hunger in the Cleveland area, including our monthly online newsletter. You can unsubscribe from our email updates at any time.

Already entered?

You can increase your odds of winning two tickets to our premier annual event, Market Under Glass, by helping us promote this event. Just [send an eCard inviting others](#) to enter in our drawing. You'll earn one entry of your name in our drawing for every 5 eCards you send.

Every time someone enters our drawing in response to an eCard you've sent, you'll earn another entry of your name in the raffle as well!

You must be logged in to see how many chances you have to win tickets to Market Under Glass. [Click here to login](#)

Not sure how to login? [Request your username and password](#)

WIN 2 TICKETS VALUED AT \$170 TO MARKET under glass

THURSDAY APRIL 24, 2008 - 6-9 pm - THE GALLERIA AT ERIEVIEW

[Official Rules](#) | [About Market Under Glass](#)

a member of
America's Second Harvest
The Nation's Food Bank Network
Ending Hunger.

[Contact Us](#) | [Privacy Policy](#)

Email: info@clevelandfoodbank.org
15500 South Waterloo Road, Cleveland, OH 44110
Phone 216.738.2265

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Using Direct Mail Lists: Online Asks

- Remind supporters about the ability to make their contribution online including benefits and hooks such as:
 - ▶ Online gifts are entered into drawings
 - ▶ Email tax receipt
 - ▶ Possible matching gift from major donor
 - ▶ Having the gift work faster for your organization

The image shows a membership renewal notice from the ASPCA. The form includes the ASPCA logo, the title "MEMBERSHIP RENEWAL NOTICE", and a message from a member. There are checkboxes for contribution amounts: \$30, \$25, \$20, and Other. A URL www.ASPCA.org/RENEW is circled in orange. A yellow arrow points from the text "Online gifts are entered into drawings" in the list to the ASPCA logo. Another yellow arrow points from the text "Having the gift work faster for your organization" to the circled URL. The form also includes contact information for Matthew Mielcarek, C/O Convio, Inc., and a barcode.

ASPCA
The American Society for the
Prevention of Cruelty to Animals
424 East 92nd Street
New York, NY 10128
www.aspcanet.org

MEMBERSHIP RENEWAL NOTICE

YES, I am proud to be a member of the ASPCA. Enclosed is my membership renewal contribution of:

\$30 \$25 \$20 Other \$ _____

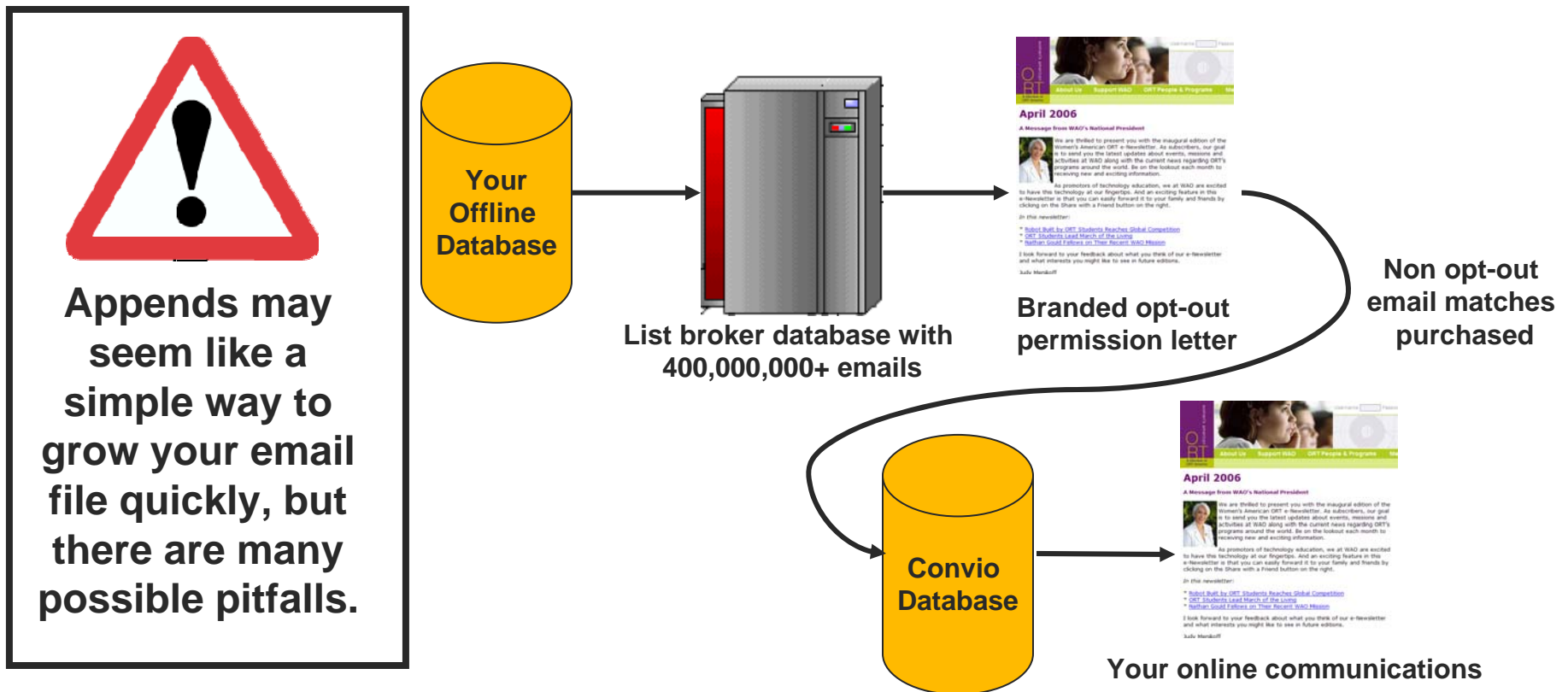
To make your gift go to work faster, log onto www.ASPCA.org/RENEW

Matthew Mielcarek
C/O Convio, Inc.
11921 N. Mo Pac Expy. Ste. 200
Austin, TX 78759-3552

Please return this form and your contribution today in the envelope provided. Please make your check payable to the ASPCA. Your contribution is tax-deductible as provided by law.
See reverse to charge your contribution and for important information.

Using Direct Mail Lists: Email Appends

- Provide offline list to list broker for matching against a database of opt-in email addresses. The broker sends an initial email to the list on your behalf.
- After removing the recipients who opt-out or hard bounce, the broker provides your organization with the resulting append list for upload into Convio database.



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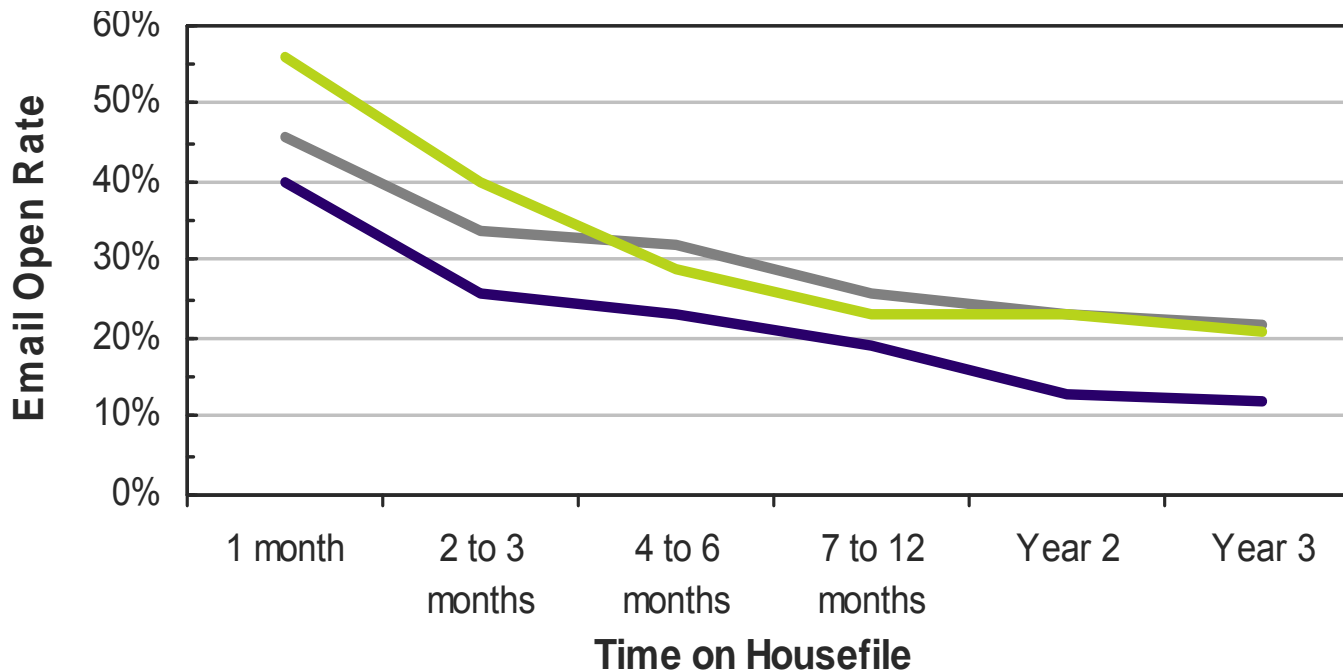
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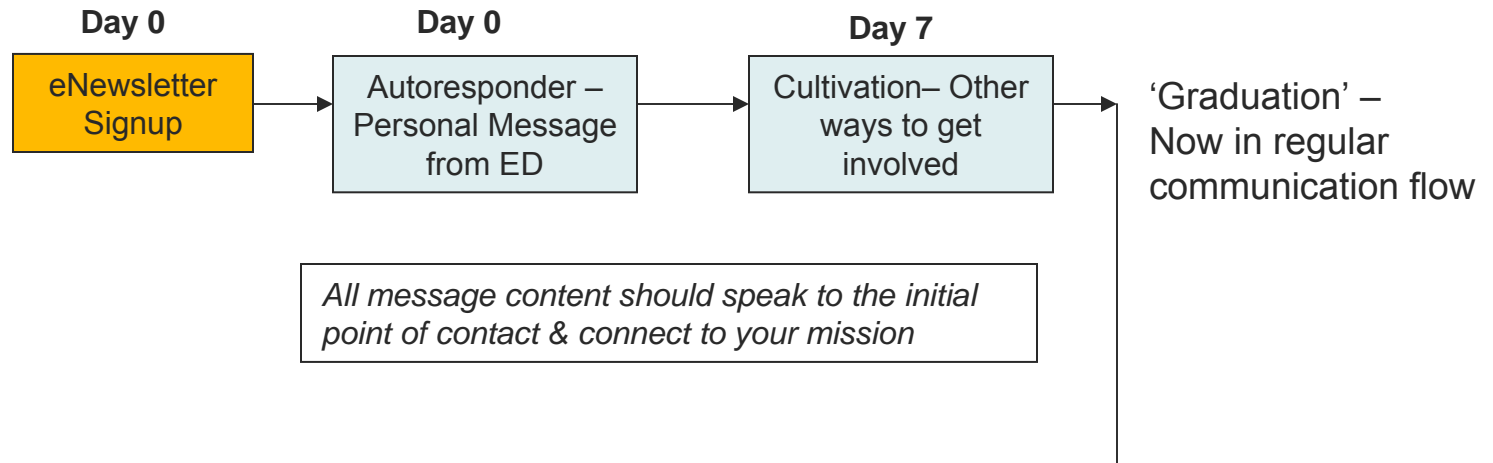
Why Welcome New Constituents?

- Nonprofit organizations lose access to a stream of new online constituents as time progresses



Source: Analysis of 3 major nonprofits

Welcome Messages: First Impressions Matter



New Constituent is suppressed from general communication until ‘graduation’.

Ongoing Communication Flow




Put a human face on all messages by highlighting specific goals, recent successes, inspirational stories, etc.

Welcome Messages – Adding a Personal Touch

- Do your initial messages:
 - ▶ Establish your brand?
 - ▶ Establish your voice?
 - ▶ Reinforce your mission?
 - ▶ Convey warmth?
 - ▶ Invite action?
- Simplicity works:
 - ▶ Basic stationary
 - ▶ Simple layout
 - ▶ Easily reproduced

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



Dear System,

This letter is my first opportunity to welcome you to the new DPS Officer's Association website and online support initiative. The DPSOA serves the men and women of the Texas Department of Public Safety as their voice and advocate. I have enjoyed a long and warm relationship with our supporters and I am excited about this new approach. It will be informative, helpful, and rewarding.

The DPS Officer's Association will continue all the programs with which you are familiar including the Scholarship Program, Emergency Relief Fund, Anti-Drug Education, and also provide useful information. For the first time our visitors and supporters will be able to not only donate online but they can purchase all of the DPSOA merchandise on line as well. This is a welcome departure from the manner we have done business in the past, and I sincerely hope it is an enjoyable experience for each of you.


Thank you for your past interest and support of the DPSOA and our programs. The DPS Officer's Association depends on public donations and that makes you the most important part of DPSOA. Without your help would be impossible to accomplish many of the things we do. My life long commitment has been improvement in the general welfare of DPS personnel makes for safer streets and highways and better communities.

I pledge to be open, honest, and responsible with the financial support you give to DPSOA. Please take the time to think about DPSOA and what you can do to support us.

Thank you,

Brian Hawthorne

From the desk of




Brian Hawthorne

[Donate Now](#)

[Tell A Friend](#)

Our Mission:
We are the DPS Officer's Association. We serve the men and women of the Texas Department of Public Safety who daily pledge their lives to protect us. To act on their behalf is our calling, our mission.

2007 Successes:
>> DPSOA grew to 3600 members
>> DPSOA Granted \$119,929.00 in scholarships, and \$82,500 in officer death benefits.

POWERED BY 

Unsubscribe | Forward to a Friend | Visit our web site
6821 Airport Blvd., Austin, TX 78762
Texas DPSOA © 2008 All rights reserved.

Welcome Messages – What's on your site?

...Or do your autoresponder messages look like this?

Subject: Thank You For Registering
From: "Default Site" <ds+defaultsite@convio.com>
Date: Tue, July 22, 2008 2:50 pm
To: lori@change.com
Priority: Normal
Options: [View Full Header](#) | [View Printable Version](#) | [Download this as a file](#) | [Add to Addressbook](#)

Thank You for registering with the Foundation .

Your Username is: lori@change.com

Your Password is: test123

[Tell&Friend](#) | [View Message](#) | [Unsubscribe](#) | [Update Profile](#)

<http://www1.foundation.org/site/ConsProfileUser?dispMode=edit>

Your Homework...

- ▶ Audit your autoresponders for design, message and copy effectiveness

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Next Steps you can take NOW: Site Audit

Activity	Recommendation
Evaluate sign-up opportunities on your site's homepage. How many? Where are they?	<ul style="list-style-type: none">■ Make sure you have a Web form on the page, not just a link/button.■ Aim to have one or more sign-up opportunities above the fold.
Identify areas on your site where sign-ups could be added	<ul style="list-style-type: none">■ Look for natural hooks around your content and mission.■ Convio CSS can help implement simple forms throughout your site.
Generate ideas for a simple viral campaign or pledge at appropriate time of the year	<ul style="list-style-type: none">■ Think about seasonal thematic campaigns (i.e. back to school, coldest day of year, etc.) to create organization hook.

Next Steps you can take NOW: Autoresponder Review

Activity	Recommendation
Sign-up as a new user on your site and review the experience	<ul style="list-style-type: none">■ Make sure the first ARs are working properly and not on default settings.■ Ensure prospects receive messages with the right copy, tone, voice and a next action.
Begin thinking of a new campaign/welcome series for all newly registered users	<ul style="list-style-type: none">■ Use existing AR message as initial message. How can prospects engage next?■ If interested, talk to your Account Manager about more advanced welcome series program via CSS

Summary of Your Homework and Next Steps

- Learn more about non-profit site traffic and general trends
 - ▶ Download a copy of the Convio Online Marketing Nonprofit Benchmark Index™ Study from customer.convio.com

- Begin work on growing your email housefile
 - ▶ Add a minimum of two opt-in opportunities to your homepage
 - ▶ Begin planning a simple viral campaign
 - ▶ Apply to the Google Grants program: www.google.com/grants

- Email Marketing
 - ▶ Audit your autoresponders for effectiveness
 - ▶ Explore adding a recurring welcome-in message for new constituents; Talk to AM for possible CSS help.



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/webinars>

And register for our next webinar on Aug 7th:

Optimizing Your Web site 101.3:

Effective Homepage Strategy & Design

