

Participants:

Tony Martignetti
Rachel Clemens
Sean Doles
Amy Sample Ward
Melanie Schnoll Begun
Seth Godin
Craig Newmark
Andrew Noyes
Aria Finger
Ami Dar
Charles Best
Mark Ecko
Majora Carter
Eric Saperston

[Audio Length: 00:57:38]

RECORDING COMMENCES:

[music]

Tony Martignetti:

[0:00:14] Hello and welcome to Tony Martignetti Nonprofit Radio - Big Nonprofit Ideas for the Other 95%. I'm your aptly named host. We have a Listener of the Week, Marcus T. Coleman, Jr. - he tweeted, "If you work for, work with, or support nonprofits, you should give Tony Martignetti's podcast a listen. Insightful and practical interviews." Marcus, thank you so much for that. Insightful and practical, that says it. Wonderful and magnificent would be cool, keep in context with the superlative culture that we have, but insightful and practical. I do appreciate that. Thank you very much. Nonprofit Radio is in the White House with Marcus, because he works for the White House Office of Faith-Based and Neighborhood Partnerships. So cool. He's @MTColemanJr. Marcus, thank you so much for loving Nonprofit Radio. Very appreciative. Congratulations on being our Listener of the Week.

Oh, I'm glad you're with me. I'd be hit with vucariasis [ph] if you wormed in with the idea that you missed today's show. Increasing your donor retention - keeping the donors you have saves money and increases efficiency over acquiring new ones to replace them. We all know that. Retention tactics coming from Rachel Clemens, President of Creative Suitcase, and Sean Doles, Vice President of Mission Advancement at YMCA of Austin. We talked at the 2016 Nonprofit Technology Conference. Social Media for Year-End - Amy Sample Ward returns from maternity leave with social strategies that close out your 2016 and align with your critical fourth quarter fundraising. She's our Social Media Contributor and CEO of NTEN, **[0:02:00]** the Nonprofit Technology Network. On Tony's Take Two, New nonprofit Technology Conference Fundraising videos. We're sponsored by Pursuant Full Service Fundraising, data-driven and technology-enabled. Pursuant.com. And by We Bee Spelling, super-cool spelling bee fundraisers. WeBeeSpelling.com.

From the Nonprofit Technology Conference, here are Rachel Clemmons and Sean Doles, talking about donor retention. Welcome to Tony Martignetti Nonprofit Radio coverage of '16 NTC, the Nonprofit Technology Conference. This interview is also part of NTC Conversations. We're in San Jose, California at the convention center. My guests now are Rachel Clemmons and Sean Doles. That's a very nice wave.

Rachel Clemens:

Hi.

Tony Martignetti:

Did you want to wave too, Sean? Too dignified?

Sean Doles:

Coming from Austin you're supposed to do Hook 'em Horns.

Tony Martignetti:

Oh, okay, Hook'em Horns. All right. Rachel is President at Creative Success, nonprofit communications firm.

Rachel Clemens:

Creative Suitcase.

Tony Martignetti:

What did I say? Creative Success.

Rachel Clemens:

Also, Creative Success. [laughs]

Sean Doles:

It is very successful.

Tony Martignetti:

It says "suitcase" right there. All right, let's try it again. President of Creative Suitcase, nonprofit communications firm. Sean Doles is Vice President of Mission Advancement at the YMCA of Austin. Welcome, Rachel. Welcome, Sean.

Rachel Clemens:

Thanks. Thanks for having us.

Sean Doles:

Thank you.

Tony Martignetti:

Oh, you're very welcome. We're going to get to your topic on donor retention shortly, very shortly, but I have to shout out the swag item for this interview, which is from Phone to Action.

It's a cardholder for the back of your iPhone. Of course, you peel off the adhesive and stick it to your phone, and then you put your Phone to Action business card in it, or your subway metro card, or your whatever other—driver's license, etcetera. Very practical. Goes in the swag pile for today. That's our NTC swag pile.

Rachel Clemens:

That's a pretty good pile.

Tony Martignetti:

It was bigger, but it got stolen overnight. You believe that? I had an NTEN scarf there, and the scarf got scarfed.

Sean Doles:

You can't trust these nonprofit folks.

Tony Martignetti:

[0:04:00] No, it was after hours. I was here until 6:30 PM. Okay, come back and see us. Increasing your donor retention. Rachel?

Rachel Clemens:

Yes?

Tony Martignetti:

What are we not getting quite right? I'm not imputing all nonprofits and all practices, but what are some nonprofits not getting quite right about some of their donor practices that are leading to too much attrition?

Rachel Clemens:

The reason we wanted to talk about this today was because we work a lot with our clients to do year-end strategies, or giving campaign strategies, and what happens is, a lot of the times we're doing the strategy, we're doing the design, and then we ask, what are you going to do to cultivate these donors after the fact? There's not a good plan for that. What's happening is, they're working a lot to get new donors in the door, but not necessarily working to keep the donors that they're getting.

Tony Martignetti:

Right, which is a problem. We have very high attrition rates.

Rachel Clemens:

Right, right.

Tony Martignetti:

I've heard as high as 70%. You have a different number. What's the number?

Rachel Clemens:

Yeah. We have the number from Bloomerang that's 43% come back.

Tony Martignetti:

Forty-three percent, so that would be a 57% loss.

Rachel Clemens:

Right.

Tony Martignetti:

Still over half.

Rachel Clemens:

Still high. Yeah.

Tony Martignetti:

No, it's terrible.

Rachel Clemens:

After all that work.

Tony Martignetti:

I feel like it should be like 2% or 5%.

Rachel Clemens:

Right. If only. [laughs]

Tony Martignetti:

We don't have much chunk, because we know how much it costs, of course, to replace a donor than to retain one.

Sean Doles:

Right. It's infinitely more efficient to retain that donor. Keep them happy.

Tony Martignetti:

Yes. Okay. Okay. Let's jump into some strategies. My voice just cracked again, it's like the third time today. Jump [high voice]. Okay. [laughs]

Sean Doles:

Reverse puberty.

Tony Martignetti:

Twelve years old. One of your—I'm reading from the session description, expressing gratitude, stewardship. What can we do better around stewardship? Let's start with you, Sean.

Sean Doles:

Well, I think first and foremost you have to have an organized plan, and then you have to execute on that plan.

Tony Martignetti:

Yeah.

Sean Doles:

You have to be judicious, it has to be realistic in terms of its sustainability. It has to fit with your level of resources, whether it's cost [0:06:00] or staff time.

Tony Martignetti:

Yeah, it's got to be realistic.

Sean Doles:

You've got to create the plan, then you've got to execute on it. If you can do that, you will see a tangible result from it.

Tony Martignetti:

Okay.

Sean Doles:

You have to be flexible along the way. Sometimes you have the best intentions with a plan, and then reality gets in the way, and you have to adjust. You're not going to get to everything on your plan, maybe, or maybe you try something that you intended to do and it's not working the way you had envisioned. You've got to adjust, but donors will recognize the effort made to thank them, to communicate the impact of their gifts. They recognize that and that appreciation is manifested with recurring donations.

Tony Martignetti:

Okay. What types of things, Rachel, belong in our stewardship plan? The strategy?

Rachel Clemens:

Right. I think the first place is, what are you going to do, what are the tactics you're going to put in place?

Tony Martignetti:

Yeah.

Rachel Clemens:

As Sean mentioned, thanking them. Cumulative thank you's, both online and off. You might look at email strategies, impact videos, any sort of info graphics that might be appropriate to show impact. You also want to think about—basically, the reason you want to do a lot of those things is that you want to remind them why they gave in the first place. Think about why they might have given. Segmentation is also something to think about. When they give the first donation, why are they giving? You might ask them what particular focus area they have so that you can do mini-campaigns to them around those focus areas, moving forward. Those are some tactics.

Tony Martignetti:

Okay.

Sean Doles:

I think another key point is personalization to the extent that it is possible. Organizations may have thousands of donors, [0:08:00] but to the extent that you can cut through and have a one-to-one communication to them that says “Tony, thank you for your gift. Here is how you have made an impact on someone’s life.”

Tony Martignetti:

Yeah. Including if we know if they’ve given it to a certain campaign, or a certain program, recognizing that.

Sean Doles:

I realize we’re at a nonprofit technology conference, but in this day and age, something as traditional as a handwritten note or a personal phone call.

Tony Martignetti:

Yeah, very touching.

Sean Doles:

Carries considerable currency, and can be some of the most effective forms of stewardship that we could do.

Tony Martignetti:

Yeah. I’m a big fan of handwritten notes. They’re so rare. They’re so rare.

Sean Doles:

They’re more effective now than they were 20 years ago.

Rachel Clemens:

The Y has the benefit of having children as part of their after school campaign, so they’ll use—kids will create bookmarks as part of camp.

Sean Doles:

Arts and crafts project. Hey, we’ve got another arts and crafts project for you. We’re making bookmarks, or we’re making placemats. We get a thousand kids making placemats and then we turn and we share them with our donors. Anecdotally, those are some of the most effective stewardship pieces that we create. People say “Oh, I love this bookmark. It puts a smile on my face every time I’m flipping through the pages of my favorite novel.”

Tony Martignetti:

It’s very touching. Of course, it’s sweet, it’s handmade, child-made, made in the USA.

Rachel Clemens:

What’s not to like?

Tony Martignetti:

Made in Austin, Texas.

Rachel Clemens:

That's right.

Tony Martignetti:

Right. All right. Okay, what else? Stewardship, it's such a broad topic. How else should we be thanking our donors, and in the process, as you pointed out, Rachel, we're cultivating them, subtly, for their next gift. What else can we say about stewardship?

Rachel Clemens:

I think another thing to consider are re-activation campaigns, or win-back campaigns. For example, if you've got a large database, but you're not getting a lot of engagement from that database, segmenting those donors in the database that you would consider inactive. You would define what makes an active donor. Is there someone who's given in the last year?

Tony Martignetti:

However, you want to define it, right.

Rachel Clemens:

Have they opened our emails, clicked right?

Tony Martignetti:

Right.

Rachel Clemens:

You take the inactive bunch [0:10:00] and you take them through a reactivation campaign. Basically, you say, "Hey, we haven't heard, we've missed you. We'd like to reconnect with you." Or, "This is the last time you'll hear from us." At that point you're asking them to opt back in. You're not asking them to opt out. You're asking them to say "I still want to get information from you." Then, once you do that, you can take them through sort of a re-welcome series, or something like that, that would basically re-engage them, get them interacting, opening things again, before you go and ask for money.

Tony Martignetti:

Okay, okay.

Rachel Clemens:

It's not an effort to ask for money right out the gate.

Tony Martignetti:

Okay, so it's more just trying to get some engagement.

Rachel Clemens:

Yeah, show that they are still interested.

Tony Martignetti:

Okay, okay.

Sean Doles:

Education, reconnect them to the cause.

[music]

Narrator:

You are tuned to Nonprofit Radio. Tony Martignetti also hosts a podcast for the Chronicle of Philanthropy. Fundraising fundamentals is a quick, 10-minute burst of fundraising insights published once a month. Tony's guests are expert in crowd funding, mobile giving, event fundraising, direct mail and donor cultivation. Really, all the fundraising issues that make you wonder, am I doing this right? Is there a better way? There is. Find the Fundraising Fundamentals Archive at TonyMartignetti.com. That's M-A-R-T-I-G-N-E-T-T-I. Remember, there's a G before the N. Thousands of listeners have subscribed on iTunes. You can also learn more at the Chronicle website, Philanthropy.com. Fundraising Fundamentals. The better way.

[music]

Sean Doles:

From the outset, I think there are several different ways you can approach this categorically. One is kind of short, medium, and long-range. The immediate [0:12:00] recognition, the immediate thank you letter or communication that goes out. Then, what's going to be going out on a monthly or quarterly basis. Other ways to conceptualize it are the online versus offline. There's a handful of things that, like I mentioned, the note, the phone call. In our organization we recognize major donors by hanging banners in our YMCA facilities. You might walk into a gymnasium or a swimming pool area and you'll see a big banner on the wall. Many museums or schools have different signage opportunities, so then there are all the online tools now that are available. There's obviously emails where you can communicate impact stories, whether it's short form digital videos, email communications.

Rachel Clemens:

Social.

Sean Doles:

Social media where you're recognizing a donor through your social media channels.

Tony Martignetti:

Sean, are you doing very much with video in this category with stewardship and cultivation? Impact?

Sean Doles:

We do a lot, and about two years ago it became a strategic focus for us when we saw that we could send out an email that would have lines and lines of text, and it would have a certain sort of open rate or click-through rate, or we put a video there and the open rates or the click-through rates were astronomically higher. People would much rather click on the video to watch it even if they only sit there for 30 seconds or a minute. We put a big emphasis on video. We created a program that we called Project 52, which was essentially a goal of creating a video and sending it out once a week, 52 weeks a year, [0:14:00] that would communicate some aspect of impact.

Tony Martignetti:

Who was this sent to?

Sean Doles:

This would be sent to donors or to specific segmented groups within our donor or within our stakeholder base, people that might have expressed a specific interest in water safety, or childhood obesity, or something like that. We don't - like most nonprofits we don't have tens of hundreds of thousands of dollars to buy advertising to tell these stories to the community, so we had to figure out cost efficient, cost effective ways to get these stories out. That's one way we've done that. Another way—

Tony Martignetti:

I'm going to turn to Rachel, it sounds like you had - it looked like you wanted to say something about video.

Rachel Clemens:

I was actually going to have him speak about how they're doing thank you videos.

Sean Doles:

Yeah.

Rachel Clemens:

For their donors.

Sean Doles:

That was the other piece of it. In addition to that, we've done some very, very simple, literally no budget videos, using a phone.

Tony Martignetti:

Smart phone, yeah.

Sean Doles:

Yeah. Where we take a group of kids at summer camp, we give them a poster that says "Thank you, Mr. Jones, for making our summer remarkable." It's a one minute video that you then personally email to this major donor.

Tony Martignetti:

Yes. You're doing the video just for that person.

Sean Doles:

Just for that person, yes.

Rachel Clemens:

You keep it on social.

Sean Doles:

It took a minute to do that video, and we literally would do 20 of those videos. Right? I mean, obviously, if you've got thousands of donors you can't do it for all of them, but major donors, and it can make a huge difference.

Tony Martignetti:

They're going to share that with their friends, their family, they're going to love that.

Sean Doles:

The production value doesn't matter. In this day and age, it's accepted. It's fine.

Tony Martignetti:

I have a lot of guests who say low production value is fine. It's sincerity, heartfelt, genuineness, it's authentic. That's what really grabs people, not, you don't need makeup lights.

Rachel Clemens:

They're used to cat videos. I mean, we're fine.

Tony Martignetti:

This is stuff that moves us. [0:16:00] It doesn't have to be high production value to be enormously moving. Great. Great, Sean. Okay. Anything else around the thank you's, the gratitude?

Rachel Clemens:

I would just add one thing coming from a visual communications background, is to make whatever you're producing, to make it as visual or as compelling as you can. Especially in Austin we have over 6,000 nonprofits, there's a lot of noise in our space, so standing out can be tricky. Giving people things they can engage with or that looks like something they'd want to share goes a long way, just that visual communication is really important. I think, sometimes, it doesn't get the -

Tony Martignetti:

The Web is visual.

Rachel Clemens:

Yeah. People scan, they don't read. You miss things.

Tony Martignetti:

People love to click videos.

Rachel Clemens:

I think the other thing, to back up actually - one of the things that's most crucial in donor retention is actually making that first give really simple and really easy. Making the give process online, if they're going to come through your donation page, making sure that donation page, the user experience on that page is optimized for your user where they don't have to think too hard, they don't have to do too much work. Making it super simple. Again, making it visually interesting. Maybe you add a delight factor. There's an organization called Saturday Place - has a great little donation feature. You hit their donation page and it's very visual. You have a sliding scale of dollar amounts, so you can play with it and see how the impact changes.

Tony Martignetti:

Oh. You slide the scale and then what happens? There's little pictures?

Rachel Clemens:

Yeah, there's little icons that change, and so it might be like apples. You're providing lunches for Saturday place. Or, along the other side they have different categories so you can provide basics, which are the lower dollar amounts, or at the very high end you can provide futures. That, I mean wow, right? That's pretty cool.

Tony Martignetti:

Oh. Yes, yes. Yes. As you slide you're seeing different icons?

Rachel Clemens:

Yes. You're seeing a change based on what you're giving.

Tony Martignetti:

Moving from apples.

Rachel Clemens:

Based on what the impact is.

Tony Martignetti:

Wonderful.

Rachel Clemens:

Yeah, it's really cool.

Tony Martignetti:

Good idea.

Sean Doles:

Yeah, the other piece of that is at the entry point, designing your systems so that you can collect information [0:18:00] that will help you segment your donors more effectively. Whether you are

using an offline old-fashioned pledge card that maybe has a section where people can indicate what areas of focus are of key concern to them, or in your online donation page, maybe a pull-down menu where they have the option of selecting, identifying that out of school time or educational enrichment is of concern to them. Then, subsequently, when you are going through your stewardship plan, you can maybe segment that group and share some impact stories with them that are going to particularly speak to that audience.

Tony Martignetti:

Segmentation, personalization.

Sean Doles:

Design that into the process from the very beginning.

Tony Martignetti:

Okay. Surveys can be valuable there, too. Maybe you haven't built it into the process or you have some donors for whom maybe they didn't answer the question or you weren't doing it then. Simple, like five, six question surveys. I've heard this a couple of times from a few different guests. Easy, you just have to keep your promise. If they say, "These are the programs I'm interested in," or "I only want to hear from you at holiday time", don't get them in February when they talked about December, their preferred month.

Rachel Clemens:

Right. I think people can also use their thank you pages after a donation, as a way to get some of that demographic information. For example, they've just given to you, they've just engaged with you, maybe you don't want to do it on the front end in the donation page section because you're worried about adding more fields or whatever the case may be, so putting those, making that thank you page work for you. You could try testing -

Tony Martignetti:

Testing some of those questions there?

Rachel Clemens:

Segmentation questions after the fact, yeah.

Tony Martignetti:

After the donation?

Rachel Clemens:

Yeah. That way they don't have to open a separate email, survey. Maybe just put it right there. You can test how many you do.

Tony Martignetti:

[0:20:00] Yes, yes. Great, I hadn't heard that.

Sean Doles:

The reality is, the more questions you ask up front, the more boxes you require them to check, the more attrition you're going to see.

Tony Martignetti:

That's what Rachel was saying. Makes the donation process simple. But after, now I've given my gift. They're thoughtful enough to ask how many times a year do they want, do I want to hear from them? What times of year?

Rachel Clemens:

That's the moment they feel best, right?

Tony Martignetti:

Right, yes, they're feeling great.

Rachel Clemens:

They're in their giving moment.

Tony Martignetti:

Yes. That's going to be a valuable test. Yes. Excellent, excellent. Let's move to how to plan for and implement sustainer campaigns. We talked about reactivation campaigns. How about your sustainer program? We know how valuable those are.

Rachel Clemens:

Right.

Tony Martignetti:

Month after month they're just giving \$5, \$20, whatever. How should we?

Rachel Clemens:

I think the key to any plan is to have a plan. I mean, truly, that's where a lot of it breaks down. You might have a goal to make, increase your sustainers, but it all comes down to the processes that are the underlying foundation for making those things happen. Making sure you have a marketing template that you can work off of. You're building a plan every time, you're getting stakeholder input into that plan. You could probably speak more to the actual implementation of it.

Sean Doles:

Well, like, in one instance, YMCAs - we have facility members, we have what is essentially a sustaining membership that we will market several times a year, really emphasize that, to where somebody would be paying, say, an additional \$10 a month on top of their traditional YMCA membership dues, right? In order to recognize them, they get a special membership card that they swipe every time they come in, they get a special shirt. There's several other ways that we recognize them. It becomes sort of a conversation piece for them and a continual reminder of their support for the Y.

We'll run several very finite, [0:22:00] tightly planned, mini-campaigns throughout the year, like one around water safety, coming up on this time of year. One as we approach summer camp, one as we approach after school care, one at the very end of the year. We'll utilize the segmentation there, so that we're only hitting those audiences that indicated, we cared about water safety, we cared about the summer enrichment, or whatnot. We're not creating donor fatigue where a single donor feels like gosh, you've asked me 12 times this year to give you money. Ideally, maybe we've asked them twice.

Tony Martignetti:

Specifically, for the programs they've expressed interest in. Again, that segmentation. Okay.

Sean Doles:

Right, right.

Rachel Clemens:

For the sustainer thing, I think one thing that's interesting, if you look at the younger audiences, they grew up paying for things monthly. They're used to streaming video and paying \$8 a month for Netflix. I think, thinking about maybe how you can specifically target that age demographic for sustainer might be an interesting test. Like Internet, they're used to software as a service. It's sort of the same model but in nonprofit world.

Tony Martignetti:

Yeah. Okay.

Rachel Clemens:

Kind of interesting.

Tony Martignetti:

Excellent. Yeah. You're right. They're in the habit of being just routinely billed. Okay. We just have a couple of minutes left. Something about, anything more around, oh—you have some ideas about digital automation? Deciding which tools are best for you.

Rachel Clemens:

Oh. Yeah. I think the thing about data, if you're going to have a plan, you've got to be able to track and measure that plan, right? Sean always says "Garbage in, garbage out." If you don't have a good data base that's pulling in accurate and good data, then you're not going to get very far. We talked in the session about before you look at features for databases, really looking at what your needs are and what your goals are. [0:24:00] You need to make sure that, if you're in development, that you're talking to the communications department, as well, you're talking to programs, anybody that's going to touch that data needs to have some up front say about how they'll use it, why they want it, what it's going to do for them. Before you look at features, really looking at needs and goals.

Sean Doles:

Yeah, what are the pain points, what are the problems you're trying to solve with this new data base? Then the other key point there is, once you have the data base in place and you're able to

extract data, creating reports that are meaningful that you can use in actionable ways. In other words, we create report cards, so to speak, for each of our facilities, for the campaigns they run, as well as for our association, where we're tracking donor retention. We're tracking major gifts, number of major gifts, number of gifts under \$1,000. we have all these different metrics that then we can analyze and see what kind of patterns emerge and then use that information that's real—it's not anecdotal, it's not a gut level hunch. It's real, and then we use that to formulate strategies that will improve our performance in the next campaign. Then we say our major donor level percentage, major gift percentage was down, we want to formulate some strategies that are going to address that, little things like that that will help us create real pathways for improvement in the future.

Rachel Clemens:

We've got some templates we're going to have up on where our slides live.

Tony Martignetti:

Okay.

Rachel Clemens:

One's a marketing campaign template and then someone in the session asked Sean to share templates for the report card.

Sean Doles:

Yeah.

Tony Martignetti:

Now how can we share these with listeners?

Rachel Clemens:

They're at [Creativesuitcase.com/16ntc](https://creativesuitcase.com/16ntc).

Tony Martignetti:

Okay.

Rachel Clemens:

They're also in our collaborative notes, people who are here.

Tony Martignetti:

For people who were here or subscribe to NTC conversations. But otherwise, creativesuitcase.com/16ntc.

Rachel Clemens:

You've got it.

Tony Martignetti:

Okay. What's there? Marketing templates?

Rachel Clemens:

[0:26:00] Yes. One is a Word template that is a marketing campaign template, so it's like what are we trying to achieve, who are our audiences, what are our risks? It basically asks all the questions that are hard to get to on your own sometimes. You can just fill those in. It talks about tactics, you can start running with that, and then Sean's - is it Excel Docs?

Sean Doles:

I think it's actually a Word doc. I'll have to look and see, but it will be a template for establishing a report card for your campaign performance.

Tony Martignetti:

They'll be in the same place?

Rachel Clemens:

Yes.

Tony Martignetti:

Okay. That's a great resource and we'll leave it there.

Rachel Clemens:

All right. Sounds good.

Tony Martignetti:

All right, Rachel Clemens, Sean Doles. Rachel again is the President at Creative Suitcase.

Rachel Clemens:

That's right.

Tony Martignetti:

Nonprofit communications. Sean Doles, Vice President of Mission Advancement at the YMCA of Austin—they're both from Austin. Rachel, too.

Rachel Clemens:

That's right.

Tony Martignetti:

Thank you very much.

Rachel Clemens:

Thanks for having us.

Tony Martignetti:

Thank you for sharing.

Rachel Clemens:

Sure.

Tony Martignetti:

This is Tony Martignetti. Nonprofit Radio coverage of 16NTC, the Nonprofit Technology Conference. Thank you for being with us.

[next interview]

Tony Martignetti:

Social Media for Year-End with Amy Sample Ward is coming up. Now, it's Tony's Take Two. I've got more Nonprofit Technology Conference video interviews for you. These are all on fundraising, Donor Surveys, Growing Your Sustainer Revenue, by the way, Nonprofit Times just had a recent story from Blackbaud's bbcon conference. Something like, triple digit revenue hikes from sustainers. They're quoting Chuck Longfield who's the Chief Scientist at Blackbaud, also a Nonprofit Radio guest. All the smart people are on Nonprofit Radio. Sustainer revenue, very timely, and smart email marketing and donor retention, which is today's interview but you can watch the video. They're all from the 2016 Conference hosted by the Nonprofit Technology Network, of course. My video on the beach introduces these four videos and has links below. It's at TonyMartignetti.com. [0:28:00] That is Tony's Take Two. The phone just rang, and I know it is Amy Sample Ward. Amy Sample Ward, how are you doing?

Amy Sample Ward:

I'm doing well, how are you?

Tony Martignetti:

I'm wonderfully, thank you. Let me give you your proper introduction.

Amy Sample Ward:

Okay.

Tony Martignetti:

Our Social Media Contributor and CEO of NTEN, the Nonprofit Technology Network, her most recent co-authored book is Social Change Anytime Everywhere, about online multichannel engagement. She's at AmySampleWard.org and [@AmyRSWard](https://twitter.com/AmyRSWard), R for Renee, of course. Welcome back.

Amy Sample Ward:

Of course, thank you, I am glad to be back.

Tony Martignetti:

Yes. Now we did chat, briefly, on the 300th show, but now you're officially back from maternity leave. Congratulations again. It's wonderful.

Amy Sample Ward:

Thank you. Thanks.

Tony Martignetti:

On that show, which was July 29th, little Oren Louis was three months, that was his three-month birthday, so now he's just a little over six months, right?

Amy Sample Ward:

Yes. Exactly. He's just a few days past six months.

Tony Martignetti:

Outstanding. So exciting for you. So exciting for you and Max. Wonderful.

Amy Sample Ward:

Yeah, it is exciting, and it is crazy that he's six months old.

Tony Martignetti:

It goes fast, I hear it from all my friends with children. I don't know personally, but my niece and nephew, it does go fast. Yes, it does.

Amy Sample Ward:

Yeah.

Tony Martignetti:

You have a little baby anecdote, a little baby Oren Louis anecdote you want to tell, or anything about his peculiarities, or anything you want to share?

Amy Sample Ward:

I mean, I think every baby is different and he's got, he is certainly a product of his parents.

Tony Martignetti:

Okay.

Amy Sample Ward:

When we meet up with other people that have babies he is the only one who is constantly trying to talk and trying to touch and engage all of the other babies.

Tony Martignetti:

That's great [laughs].

Amy Sample Ward:

They're all just laying there looking at him, and he's trying to talk to them.

Tony Martignetti:

Multi-channel engagement strategy.

Amy Sample Ward:

We are seeing a lot of ourselves in him already.

Tony Martignetti:

Cool. All right, that's great. Multi-channel engagement. [laughs] Listen. 17NTEC registration, [0:30:00] '17, the 2017 Nonprofit Technology Conference registration just opened, I note. We want to encourage people to go to that. It's an outstanding conference.

Amy Sample Ward:

Yep. Registration just opened three days ago, on the first, and we're already at record response. We know this is going to be a really big year.

Tony Martignetti:

Excellent. Just this week or not even, whatever, today's the fourth, right? Just in three days, you're already ahead from this time last year, three days in last year?

Amy Sample Ward:

Oh, ahead from any year. Yes.

Tony Martignetti:

Outstanding. Congratulations. Okay.

Amy Sample Ward:

Yes, thanks.

Tony Martignetti:

People go to NTEN.org, and then do you have to click on the events tab or no, does it just open at NTEN.org?

Amy Sample Ward:

It'll be right there on the home page.

Tony Martignetti:

NTEN.org. Okay. Go to the conference, for Pete's sake. Oh, this one is in Washington, D.C., right?

Amy Sample Ward:

Yes, it's in Washington, D.C., March 23 through the 25th, and D.C. is always our largest year, whenever we go to D.C. because so many organizations are there and have partners there and feel like they're used to traveling there, so we always plan for the years that we're in D.C. to be the biggest we've had, but it's always like the biggest we've had until that year. So, we know this year will be the record that we've ever had until sometime in the future we go back. But yes, it will be fun. We're planning all kinds of fun things for this next one.

Tony Martignetti:

Outstanding. Always lots of, hundreds of smart people speaking and, yes, it's a very smart conference. Go, and learn how to use technology wisely, wiser, in your social change work. That's it. All right. Cool. We want to talk about some strategies that you have for year-end social media. Before we jump into different strategies, I would like to start with how to evaluate whether we're doing the right thing or not, through our social engagement strategies, [0:32:00] and you like Google Analytics for that.

Amy Sample Ward:

Yes.

Tony Martignetti:

Okay.

Amy Sample Ward:

I mean, I think that the biggest thing, both kind of to this piece that you've brought up and more broadly to the idea of social media around year-end campaigns, it's so frustrating and disheartening to me when I see organizations or talk to organizations who are, whether it's a year-end campaign or any other time of the year, and social media is like a compartment of itself. It's over on one side and then you have all these other people and channels that you're working on, on the campaign. I feel like, that's just setting yourself up to say, oh, social media isn't valuable to us. Right? Because it's not even a part of your planning, it wasn't part of how you thought of the strategy and it was only later that you were like, "oh gosh, we have this campaign going, let's tweet a bunch about it." But that's not integrating—

Tony Martignetti:

That's not integrating at all.

Amy Sample Ward:

Social media into your campaign. That's still an afterthought. I think, just recognizing that you wouldn't say "okay, we're going to launch this fundraising appeal for the end of the year and we're not going to tell anyone who's going to work on the emails related to it until, like, the day of." You would never do that, so why are you doing that with all the social channels?

Tony Martignetti:

Yeah. Don't make social a stepchild.

Amy Sample Ward:

Well, just don't make it a separate—

Tony Martignetti:

Don't hold it off, integrate. Integrate.

Amy Sample Ward:

A separate island. Right? Yeah.

Tony Martignetti:

In our planning, we want to build in analytics.

Amy Sample Ward:

Yes.

Tony Martignetti:

Okay. What advice do you have around specific URLs or how would you like us to do this?

Amy Sample Ward:

Yeah. There's a lot with Google Analytics that you can do.

Tony Martignetti:

Yeah.

Amy Sample Ward:

I mean, first, I always think you should go into planning campaigns with some sort of information already. Looking at Google Analytics [0:34:00] before you start planning your campaign to say, oh gosh, what parts of the site are people using? I'm sure many organizations have a Donate page that's up year-around. Are people even going to it through the rest of the year? If they're not, then putting your year-end campaign information on that Donate page is probably not going to get a lot of eyes, right? Because no one's going to that page. Do some of your homework before you start planning, using Google Analytics. Look at how people are using your site, but then also, Google Analytics separates out traffic.

Evaluate what kind of social traffic you have, from, say, direct links. A direct link is often, that you sent an email, so someone had a direct link into your site, they didn't have to search or anything. Figure out what that incoming traffic flow is like now, because otherwise you're going to spend time planning your campaign, you're going to launch it and then you're going to be like, oh gosh, we have all these people visiting our website. Well, maybe you already had those people visiting your website. You're not going to have anything to really inform your evaluation, so I think doing some homework first, on how people are using the site, and also how people are getting to the site, if they're coming from social channels, if they're coming from email, so that when you plan, you plan with those pieces in mind.

Then, once you're running the campaign, it's really not difficult, and there are plenty of resources if you want some step-by-step guides on using Google Analytics to set up what are called campaign URLs, so that instead of just always writing, for example, NTEN.org, you can have a longer URL that is still just sending people to the same page, but that URL has some important code in it for Google Analytics. It knows this is a link that you're only using on social media for this specific page. Here's a different version of that code and that URL that you're going to put in your email. That way, you can say, okay, we're all obviously sending people [0:36:00] as much as we can to the donate page or to the NTC page, but we're able to look in Google Analytics and say okay, a lot of the people that are coming are coming from social media, and those are the ones who are staying and going to the Register page, etc. Then, these folks coming from email, they're not coming as much. Or whatever the situation is. Using those

campaign URLs will help give you so much information about who's responding, who's coming to that page, and how they're taking action.

Tony Martignetti:

Okay, and it's - sorry. You're monitoring where they're coming from and where they're going to all in that URL, because of where you place it?

Amy Sample Ward:

Yes.

Tony Martignetti:

Okay, okay. Brilliant. Okay. Of course, there's tons to be said about Google Analytics. I think I've got an interview from one of the NTCs on Google Analytics. I know we have one on Google AdWords, but separate. I know we could do hours on Google Analytics.

Amy Sample Ward:

Oh, totally. Like I said, there are resources to help give you some step-by-steps if you are new to using it, but Google Analytics is free, you should be using it, and it does not take an incredible amount of technical knowledge to get it set up. You just have one little line of code you need to add to your website and then your account is activated and you can do all this tracking.

Tony Martignetti:

Yeah. Okay, okay. You mentioned resources, do you know any off the top of your head that you can recommend?

Amy Sample Ward:

Yeah, I'm happy to tweet a few and send them to you to post up with the archives.

Tony Martignetti:

With the takeaways, I could put them on the Facebook page.

Amy Sample Ward:

Yes. Perfect.

Tony Martignetti:

Okay. You could do that. Sure. Okay. Is there any other point you wanted to make about the analytics before we get into actually doing the campaign work?

Amy Sample Ward:

Well, I guess the last point that I'll make, kind of to wrap it back up to where we started is that, if you don't do [0:38:00] that homework at the beginning to create some kind of benchmarks, when you launch the campaign and you're trying to kind of report out to staff or even your board about how well it's going, it's going to feel really arbitrary to say "100 people from social media donated." Well, great.

Tony Martignetti:

How does that compare to before the campaign?

Amy Sample Ward:

What do we compare that to? Yeah. Do that homework, so that you can be informed in your planning, but also so that you can kind of report against that benchmark, so your reporting makes sense and has some context.

Tony Martignetti:

Okay. Very good. If we're going to do this as part of a campaign, then we need to have consistency across all our channels.

Amy Sample Ward:

Right. Yeah, I mean one thing I always think about, just in our own planning at NTEN is that regardless of the age demographic, and regardless of the channel that the donation comes in, so even if somebody is going to write you a physical check, the majority of people still go to your website before they make that donation. Even if they are following you on social media and that's where they saw the ask, and they're going to do an online donation, people are still kind of following up on your ask and, and what it is that you're potentially working on before they donate.

The huge opportunity there is to recognize that you're not necessarily always going to know where they saw that ask and what other piece of your work they're evaluating. Creating some consistent experience around that is huge. It doesn't take a ton of work, most organizations are already going to create some sort of collateral or branding material for their campaign, so making sure you have those same images in [0:40:00] the right dimensions, right? Because every platform wants to have its own particular dimensions, but so that your Facebook banner has an image that reflects your campaign. Maybe you are to use a pretty standard example for your ad campaign, there's a family that you serve and you're telling their story in your appeal letter, right? Making sure that maybe a quote from that story that's really compelling as a stand alone quote is in your Facebook banner, and your Twitter banner has a reference to the same campaign.

Wherever folks are kind of touching into the campaign and then moving around, to evaluate if they do want to donate, they are seeing the same appeal. Not that it's like the same image over and over and they're just getting sick of it, but you're within that same world of the campaign instead of heading over to your Twitter page and having it be about your last event, and it's completely unrelated and doesn't speak to the same thing.

Tony Martignetti:

Okay. Very good. Tell you what, let's go out for our break.

Amy Sample Ward:

Okay.

Tony Martignetti:

When we come back I've got live listener love, of course, the live love has to go out. Amy and I will keep talking, including integrating offline, the offline support for your social support for your year-end campaign. Stay with us.

[music]

Narrator:

Like what you're hearing on Nonprofit Radio? Tony's got more. On YouTube, you'll find clips from his stand-up comedy, TV spots, and exclusive interviews. Catch guests like Seth Godin, Craig Newmark, the founder of Craig's List, Mark Ecko of Ecko Enterprises, Charles Best from DonorsChoose.org, Aria Finger from DoSomething.org, and Naomi Levine from New York University's Heyman Center on Philanthropy. Tony tweets, too. He finds the best content from the most knowledgeable and interesting people in and around nonprofits to share on his stream. If you have valuable info, he wants to retweet you. During the show, you can join the conversation on Twitter, using #NonprofitRadio. [0:42:00] Twitter is an easy way to reach Tony. He's @TonyMartignetti. M-A-R-T-I-G-N-E-T-T-I. Remember, there's a G before the N.

He hosts the podcast for the Chronicle of Philanthropy. Fundraising Fundamentals is a short, monthly show, devoted to getting you over your fundraising hurdles. Just like Nonprofit Radio, Tony talks to leading thinkers, experts, and cool people with great ideas. As one fan said, Tony picks their brains and "I don't have to leave my office." Fundraising Fundamentals was recently dubbed the most helpful nonprofit podcast we have ever heard. You can also join the conversation on Facebook, where you can ask questions before or after the show. The guests are there, too. Get insider show alerts by email. Tony tells you who's on each week and always includes links so you can contact guests directly. To sign up, visit the Facebook page or TonyMartignetti.com.

Melanie Schnoll Begun:

Lively conversation, top trends, sound advice. That's Tony Martignetti Nonprofit Radio. I'm Melanie Schnoll Begun, Managing Director, Morgan Stanley Philanthropy Management.

[music]

Tony Martignetti:

Melanie Schnoll Begun is next week's guest for the hour. All right, live listener love, it's got to go out. It's all over the world, it's amazing. Where do I start? We're going to start abroad. Pitesti - I don't know if I'm saying it right - Pitesti, Romania. Love it. Hemmingen, Germany. Guten Tag. The live listener love goes out also to Norway. We can see the city but I really don't want to mispronounce it. Gaupne, Norway. Live listener love to you. Philippines, we've got Corazon City. Istanbul, Turkey. Milano, Italy. [0:44:00] Seoul, South Korea. Anyeong-haseyo, of course. Kamsa-hamnida. Also, Ottawa. Nation's capital. Canada checking in. Ottawa, live listener love to you. Iran. I'm sorry, we cannot see your city but we know that you are with us. Coming into the U.S. St. Louis, Missouri, Rosedale, New York, Binghamton, New York. New York, New York. Unbelievable. New York, thank you for that New York love. It's going out to you. Thank you for bringing it in. It's going out, including New York, New York. Love that. Thank you. College Station, Texas, with us. Live love. Eugene, Oregon, not Ore-gone. I was on a

bus yesterday and somebody said she was taking Jet Blue to Ore-gone, and I wanted to tap her on the shoulder and correct her, no, it's Oregon. Eugene, Oregon. Live listener love going to you.

Okay, and of course, on the heels of the live listener love comes the podcast pleasantries because how could we not say thank you to, it's really, it's more than 10,000 now. The numbers are going up. It's more like 12, 13,000. I've got to make it official. I want to see if it sticks before I start boasting, but, we certainly have had shows where there've been 12, close to 13,000 listeners. Yes. Is it consistent? Not quite, but we're spiking. Podcast pleasantries to the many tens of thousands, 1.3 10,000s. Listening. Thank you, so much. Whatever activity you're doing whenever you're listening in your time shift, thanks for being with us. The affiliate affections - to our many AM and FM station listeners throughout the country, including in Oregon. I mentioned Eugene, Oregon, live listener love, we're on a station in Salem, Oregon. If you are listening on one of the AM and FM affiliates, affections to you. Thank you so much.

Amy Sample Ward, here we are, and let's move along to your—what's your next? You throw out another strategy. Go ahead. What else do you want to talk about, social media-wise, for our year-end campaign?

Amy Sample Ward:

Sure. Well, I think one thing that [0:46:00] we've seen organizations kind of struggle with, or not necessarily struggle with but kind of stumble with, is how to balance their own kind of full year-end campaign with these giving days that are now more prominent. Giving Tuesday often is happening kind of in the middle of people already having their own year-end campaign, and then, sometimes towards the end of the year, sometimes at other times during the year, different states or regions have their own, kind of local giving day, and so how do you balance all the effort that goes into even just a single giving day, and having visibility and donors on that with what we're already running for six weeks, kind of an end-year campaign.

I think that, that is tricky. I think it requires planning for that day when you're doing your full end of year campaign. If you're going to have six weeks as your end of year campaign, knowing, okay, in week three, Giving Tuesday is happening. Is there maybe a version of our campaign ask that we want to reserve as our kind of Giving Tuesday version of the ask, so that it feels like an opportunity to make an additional ask during the campaign that otherwise maybe would have felt like too many asks, right? Because you're kind of taking advantage of that day, versus feeling like we're going to create a whole separate Giving Tuesday campaign.

I think organizations should try to be really realistic about their capacity, because Giving Days in and of themselves take a lot of effort and your primary effort is going to be your own end of year campaign. Not necessarily completely avoid it, if it is something that's going to give you a little bit more traction, or, like I said before, an opportunity to maybe make a different version of the ask [0:48:00] that gives you one more touch point during the campaign.

Tony Martignetti:

Planning is important, and also, being realistic about what your team can do. Maybe you need to pass on Giving Tuesday, or something else in your year-end strategy. Be realistic, I mean, it's the

same thing we've talked about so many times, like Shiny Object Syndrome. In the social channels. You can't do everything in your year-end campaign that you might like.

Amy Sample Ward:

Right.

Tony Martignetti:

Plan and be realistic, and obviously, get the input of the people who are going to be doing the work.

Amy Sample Ward:

Well, and I think the other part about being realistic there is that for the vast majority of organizations, that bulk of donations for your end of year campaign, aren't coming the first week of December, they're coming the last week of December. The timing of Giving Tuesday as the Tuesday right after Thanksgiving may not be the most high traffic time for your donors anyway. Thinking about that, too, do not have an unrealistic expectation that that's going to become your biggest giving day now. And, if it isn't, what do you want on Giving Tuesday? Is that a day, like you said, to skip, because for your community it's not worth it? Is it for your community an opportunity to maybe make a really small ask and get people that otherwise wouldn't give to give just \$10, and then you can ask them again before the end of the year. I think there's different ways to kind of use Giving Tuesday as a test for your community, but for most organizations who are running a full end of year campaign, that's just going to be one little blip in the longer campaign.

Tony Martignetti:

It could also be for something smaller and non-financial.

Amy Sample Ward:

Yeah, non-monetary.

Tony Martignetti:

Maybe it's the signing of a petition or maybe it's volunteering. [0:50:00] Maybe use Giving Tuesday as a volunteer recruitment day.

Amy Sample Ward:

Totally. I think that's a great idea, because it lets people feel like they're still participating in that day and they're still contributing to the organization but maybe those are the folks who wouldn't give and they're not going to otherwise respond to asks.

Tony Martignetti:

Yes. Leading up to Giving Tuesday and that day, you're taking a little break from the money asks.

Amy Sample Ward:

Yes.

Tony Martignetti:

Then you get back to it.

Amy Sample Ward:

Yes, exactly.

Tony Martignetti:

Yes. Okay, okay. Cool. Okay, anything else you got in that respect?

Amy Sample Ward:

I mean no, we could talk - I mean I want to be conscious of time and talk a little bit about offline, too, because I think that a few great pieces from the interview earlier in the show today.

Tony Martignetti:

Okay, let's go there. Okay, let's go there.

Amy Sample Ward:

Like the piece about cards and thinking about those real, physical touches that make it much more meaningful.

Tony Martignetti:

I am such a big proponent of the hand-written note and the small card that you can do. You don't have to stare at a blank 8 ½ by 11-inch page on your screen and feel like you have to fill it with words for the next 40 minutes.

Amy Sample Ward:

Right. You can write one sentence.

Tony Martignetti:

Yes, it's one or two sentences on a little note size card and then a matching envelope, a hand-written envelope, it's enormously touching. Sean Doles, Sean and Rachel both said it, but yes, I've been a fan of that for a long time. It's quick, it's genuine and sincere, and it's extraordinary. It doesn't happen anymore, so you're stepping it up, way up.

Amy Sample Ward:

Yeah, one thing that we've tried is, specifically when it comes to kind of year-end things, of course at NTEN we love sending cards and stickers and things all year round, but when it comes to the end of year things, picking a threshold like \$50 or \$500 [0:52:00], whatever is your, makes sense as a line for your organization, and saying, okay anybody at that number or above is going to get a handwritten card, and then, because that takes slightly more capacity. Then we'll also pick a day, usually before people go offline for the holidays. So, like maybe the 17th or 18th of December, and anyone who has donated by then, we divide up among staff, so that every staff person only has eight or twelve people, and everybody just calls to say thank you for donating. Doesn't ask for another gift. The purpose of the call is just to say thank you. As you can imagine,

eight times out of ten you're getting a voicemail anyway, because people are at work or whatever, but we get such incredible response from people saying oh my gosh, you actually called to thank me for donating.

Tony Martignetti:

Yeah.

Amy Sample Ward:

Otherwise, donating is pretty human-less. You got an email, you went to a website, you put in your credit card, you didn't interact with anybody, so, being able to have a card or a phone call to say thank you makes it feel like we saw that you gave that gift. Right? That I think is the really powerful thing, is that people recognize that someone's paying attention. They know that I made this gift and I am seen by this organization, and I think that's—for a year-end campaign when there's so many messages out there, and so many different competing asks, it can make people really remember you.

Tony Martignetti:

That's where we have to leave it. Outstanding. I agree. The offline. It is fun, it can be a lot of fun. She's Amy Sample Ward, CEO of NTEN at AmySampleWard.org and @AmyRSWard. You've still got it. You haven't lost it since the spring and we love having you back. She's gone already. You believe that? She hung up on us.

Amy Sample Ward:

Oh, I just thought that you were cutting all the way, [0:54:00] cutting out, so I didn't know if I could say anything. Thank you for having me. It feels good to be back.

Tony Martignetti:

You're very welcome, and I was saying you haven't lost it since the spring.

Next week, as I said, next week, Melanie Schnoll Begun, How to Appeal to High Net Worth People. Also, next week, please vote. Whoever for, it's important. Get out, please vote. If you missed any part of today's show, I beseech you, find it on TonyMartignetti.com. The beseech got lost the past couple of weeks. I don't know what happened to beseech, but it's back. Fear not. We're sponsored by Pursuant, online tools for small and mid-size nonprofits, data-driven and technology-enabled, and by We Bee Spelling, super cool spelling bee fundraisers. WeBeeSpelling.com.

[music]

Our creative producer is Claire Meyerhoff. Sam Liebowitz is the Line Producer. Gavin Dahl is our AM and FM Outreach Director. The show's Social Media is by Susan Chavez, and this cool music is by Scott Stein. Thank you for that, Scotty. Be with me next week for Nonprofit Radio - Big Nonprofit Ideas for the Other 95%. Go out and be great.

[music]

Narrator:

What's not to love about Nonprofit Radio? Tony gets the best guests. Check this out from Seth Godin.

Seth Godin:

This is the first revolution since TV 1950 and Henry Ford 1920. It's the revolution of our lifetime.

Narrator:

Here's a smart, simple idea from Craig's List founder, Craig Newmark.

Craig Newmark:

You have insights or presentation or anything. People don't really need the fancy stuff, they need something which is simple and fast.

Narrator:

When's the best time to post on Facebook? Facebook's Andrew Noyes knows.

Andrew Noyes:

At traffic is at an all-time high around 9 a.m. or 8 p.m. so that's when you should be posting your most meaningful posts.

Narrator:

Here's Aria Finger, COO of DoSomething.org.

Aria Finger:

[0:56:00] Young people are not going to be involved in social change if it's boring and they don't see the impact of what they're doing, so you've got to make it fun and applicable to these young people. Otherwise, a 15 and 16-year-old, they've got better things to do. If they have X-Box, they have TV, they have their cell phones.

Narrator:

Ami Dar is the founder of Idealist.

Ami Dar:

It took two or three years for foundation staff to sort of deign to add an email address to their card. "This email thing is weird, why should I give it away?"

Narrator:

Charles Best, founded DonorsChoose.org.

Charles Best:

Somehow they've gotten in touch, kind of offline, as it were, and now, to exchanges of brownies and visits and physical gifts.

Narrator:

Mark Ecko is the founder and CEO of Ecko Enterprises. You may be wearing his hoodies and shirts. Tony talked to him.

Mark Ecko:

Yes, I'm a big believer, it's not what you make in life, it's how you make people feel.

Narrator:

This is Public Radio host Majora Carter.

Majora Carter:

Innovation is in the power of understanding that, you don't just put money on a situation and expect it to heal. You put money on a situation and invest it, and expect it to grow.

Narrator:

Savvy advice for success from Eric Saperston.

Eric Saperston:

What separates those who achieve from those who do not is in direct proportion to one's ability to ask others for help.

Narrator:

The smartest experts and leading thinkers are on Tony Martignetti Nonprofit Radio. Big Nonprofit Ideas for the Other 95%.

[music]

END OF RECORDING