



MID-YEAR PREPARATION

10 Simple Steps to Get
You Ready for Year-End

IMPLEMENT SIMPLE STRATEGIES NOW THAT WILL MAZIMIZE YOUR YEAR-END FUNDRAISING EFFORTS.

Did you know that most organizations receive half of their annual online donations during November and December? What you are doing now to build enthusiasm with your loyal supporters and engage new supporters will make a big difference in meeting or exceeding your year-end goals.

The holiday rush is right around the corner. Have you put in place strategies for maintaining strong communications and list growth? Mid-year is the perfect time for a plan check-up. Pat yourself on the back for all you've accomplished so far and start working on implementing some simple strategies that can make a big year-end impact. Here is a list of 10 common sense steps—think of them as your mid-year check-list—to help you ensure year-end success. Check off the strategies you've already put in place and pick a few of your favorites to implement now so you maximize your efforts for end-of-year appeals.

1 CAPTURE EMAIL ADDRESSES FOR YOUR OFFLINE DONORS

More and more supporters are open to engaging with you online, even if they choose to donate offline. Capturing email addresses for your offline donors will allow you to implement a multi-channel approach. Use any opportunity you can to capture email addresses from your supporters such as at events, through direct mail response cards, and via telemarketing. You can do this by offering specific calls-to-action that are only available online, such as register on your website to receive a premium or to receive an “early-bird” registration for an event. You can also promote the reasons to visit your website in your offline communications, such as user-contributed photos and stories or the ability to easily update a mailing address.

► Email Marketing

Email marketing can help your organization build a loyal, involved support base and drive higher response rates in fundraising, advocacy, marketing, special events and other functions.

 **For tips on email marketing**, refer to the Convio guide, *The Basics of Email Marketing for Nonprofits: Using Email Communications to Build and Strengthen Constituent Relationships*, available here: <http://www.convio.com/emailbasics>

2 USE A MULTI-CHANNEL APPROACH (IF YOU AREN'T ALREADY)

Savvy organizations are adopting a multi-channel approach to convert online acquired prospects, using email first, followed up by mail, then telemarketing to maximize conversion rates. In your direct mail, incentivize supporters to give online with benefits like getting an email tax receipt, a matching gift from a major donor, or a drawing or giveaway. Our research shows that direct mail donors who also receive

email give two times as much and renew at 10% higher rates than those just receiving email. According to a joint study by Convio and StrategicOne, “the increased value of adding an online donation and solicitation channel for donors acquired offline is \$44.71 (a 39% increase) per donor over 12 months.”

3 GET TO KNOW YOUR SUPPORTERS BETTER


Due to the diverse needs of your supporter base, segmenting constituents into appropriate groups will allow your organization to more effectively communicate relevant information to each group. Segmenting your list and then targeting groups with communications and appeals based on their interests, donation history, gender, age, length of membership or any other defining characteristic will result in higher response rates. Know who your supporters are and what they care about. Understand which donors, activists, and volunteers are most active, and devise special programs to keep them engaged. Regularly ask supporters to provide information about themselves to help you improve your segmentation and targeted messaging. Include questions in your online surveys, direct mail response cards and in sign-up sheets or surveys at events.

4 SEGMENT YOUR WELCOME MESSAGES

It's great if you have a general welcome series, but we recommend you create specific welcome series for your key supporter types. Creating “pathways” for each supporter type is key to maximizing the supporter experience on your website and for beginning to build relationships. For all of your first-time

► Welcome Series

A solid, professional welcome series sets the tone for the relationship, creates an identifiable voice for your organization, and educates new constituents about your mission and the scope of your impact before they start getting appeals.

 **For tips on creating a welcome series**, download Convio's *Fundraising Success Kit for Small and Growing Nonprofits*, available here: <http://go.convio.com>

donors, you can create a welcome series to thank them for the support, communicate how their funds are being put to good use, and eventually build up to asking for their continued support year-round. After new supporters have 'graduated' from the welcome series, their names can be added to your other communications so you can further cultivate these relationships.

5 BE TRANSPARENT WITH YOUR COMMUNICATIONS

To keep supporters engaged, it's important to be open and transparent in providing regular updates on how the funds you raise are being used. You can include these updates in your existing email communications and on your website. You'll make your email and website messaging much more effective and engaging by

highlighting specific goals, recent successes and/or inspirational stories. If you equip your supporters with this type of information, it will give them even more reason (and confidence) to “spread the word” with others.

6 PROMOTE A SUSTAINER OR PLEDGE GIVING PROGRAM

The donors who supported you this year likely had to be selective about their charities. It’s likely these donors may be even more inclined to be loyal to you and would be open to recurring donations or paying their annual donation amount throughout the year. Sustaining and pledge donors typically renew at rates 10-20% higher than single-gift donors. It’s important to offer reasons for people to give on a recurring basis or to pledge a larger commitment that can be paid out over time.

7 OPTIMIZE YOUR HOMEPAGE

The beginning of the new year is a great time to make improvements to your homepage that don’t necessarily require a redesign.

- **Have a strong message.** Your mission should be clearly stated on your homepage in 15 words or less. Surprisingly, many organizations don’t clearly state what they do. Make your calls to action clear and compelling.
- **Decrease the clutter and length on your homepage to promote engagement opportunities.** Move your engagement opportunities “above the fold.” After you tell website visitors who you are and what you do, be clear about the actions you want them to take.
- **Improve your registration opportunities.** Your online relationship begins with capturing an email address. Only with a growing email list can any organization thrive online. You should use any opportunity you can to gather email addresses and then immediately communicate with these new

► The 5-Second Test

Display your homepage for five seconds—then close it and ask a friend to write down what he or she remembers. Effective websites tell visitors within seconds of their arrival:



1. Where they are
2. What they can do
3. Why they should act

supporters. Aim to have one or more sign-up opportunities above the fold. Make sure you have a web form on the page, not just a link or button, and have compelling reasons for your top three audiences to register with you. There are many effective tactics you can use to motivate online registrations, such as downloadable content, contests, drawings, eCards, polls, pledges, and premiums. In addition, you'll get a higher registration rate if you make your online registration simple. We recommend you capture email address, first name, last name and ZIP at most. You can ask for additional information as a second page—such as interests and chances to opt into other email communications.

8 CREATE TARGETED WEBSITE CONTENT

Your website is the primary way many supporters stay informed about what your organization is doing. So make sure it speaks to them—offer content based on the needs and interests of your various audiences. It's important to understand your various audiences and have content based on their needs. Presenting a compelling story, delivering useful content, and creating opportunities for engagement should be organized in a fashion that is easy for website visitors to navigate and understand. Making your website experience better will drive higher conversion rates, and keep your constituents coming back to stay in touch with your organization.

9 MAKE YOUR EMAIL NEWSLETTER MORE ENGAGING

For most organizations, an email newsletter is a prospecting tool, so sending the same newsletter to everyone is not appropriate. We recommend at a minimum, having two versions—one for prospects / non-donors and one for current donors. Does your newsletter reflect that you know the recipient? Consider adding conditionalized content based on their relationship with you. Have they donated this year? Do they volunteer? Have they attended events? Have they done team event fundraising? Does your newsletter engage the reader? Have clear calls to action such as, "Update Your Address" or, "Learn More" or, "Share Your Story." Make sure you have the Donate and Tell-a-Friend links above the fold.

10 TAP INTO THE POWER OF VIRAL MARKETING

Your donors have already expressed their affinity for you by donating to you in a tough economy. Leverage this support to help spread the word about your organization. When combined with an effective registration mechanism, viral campaigns targeted specifically at growing the email house file can generate impressive results. We have worked with organizations that have seen over 25% growth in their email files in as little as two weeks. In addition to specific campaigns targeted at growth in email acquisition, Tell-A-Friend links should be incorporated throughout your online programs, enabling supporters to forward web pages, emails, eCards, stories, etc. to individuals they feel would be interested. Finally, tapping into your supporters' networks is key. Provide them with personal outreach tools, such as tributes pages and widgets they can plug into their social network sites.

SPOTLIGHT ON CONVIO

With the various tools and services provided by Convio, you can accomplish these 10 steps and maximize your year-end fundraising efforts.

Convio Go!

Whether your objectives include raising money, increasing website traffic, building a welcome series, driving responses to an advocacy appeal, or all of the above, Go! can deliver. ***It's a one-year, guided program designed to help novice or resource-constrained organizations get started online at a lower cost.***

After ten years of launching online initiatives for over 1,000 leading nonprofits, we've distilled the highest-impact best practices in online fundraising into the program, along with a software toolbox that can grow as you do, plus a team of experts to guide you through your online campaigns. With Go!, this will be the year you dream big and spread your mission.

Common Ground™

No matter where your fundraising strategy is headed, Convio Common Ground CRM (constituent relationship management) can meet your evolving needs. Common Ground is designed to help nonprofit professionals like you get your job done quickly, easily, and with more flexibility than you ever thought possible by efficiently tracking and managing all interactions with your supporters.

Convio's CRM is a common ground for information about all of your constituents: donors, volunteers, new contacts, and just about anyone else who helps support your mission. Say goodbye to spreadsheets and custom databases. Common Ground gives you true CRM capabilities and helps you thrive, not just survive. You'll be able to manage your direct mail program better. Integrate your online fundraising with your database. Incorporate social media into your marketing activities. Boost your major gift program. Track grants. Common Ground can help you with all of this, and more.

Online Marketing

If you want to take your online presence to the next level, Convio's online marketing suite will help you get there. Convio offers integrated software for fundraising, advocacy, event fundraising, ecommerce, tribute/memorial sites, web content management, and email marketing. All of our online marketing products share a single online marketing database to give you a complete view of your supporters' online activities.

Imagine what you could achieve with a complete suite of fundraising tools at your fingertips. Convio provides everything you need for communicating, tracking and managing your fundraising campaigns and supporters. From recording interactions with potential major donors to delivering high-impact email messages, Convio saves you time and helps you achieve your mission more efficiently and effectively as you nurture loyal constituents to spread your mission and reach your goals.

ADDITIONAL RESOURCES

Convio Research

- **The Next Generation of American Giving**, <http://convio.com/nextgeneration>
- **The Convio Online Nonprofit Benchmark™ Study**, <http://www.convio.com/benchmark>
- **The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors**, <http://convio.com/wiredwealthy>

Convio Best Practice Guides

- **Fundraising Success Kit**, <http://go.convio.com>
- **Nonprofit Website Fundamentals**, <http://www.convio.com/websiteguide>
- **Basics of Email Marketing for Nonprofits**, <http://www.convio.com/emailguide>
- **Going Social: Tapping into Social Media for Nonprofit Success**, <http://www.convio.com/socialmedia>
- **Holiday Giving Guide**, <http://www.convio.com/endofyeargiving>

More Convio Resources

- **On-Demand Webinars**, <http://www.convio.com/webinars>
- **Quick Tour Videos**, <http://www.convio.com/quicktour>
- **Portfolio of Real-World Fundraising Success**, <http://www.convio.com/portfolio>
- **Sign up for our newsletter**: *Convio Connection*, a free bimonthly newsletter for nonprofits on how to attract constituents, drive action, and build loyalty through online relationship management. <http://www.convio.com/newsletter>

ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.

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