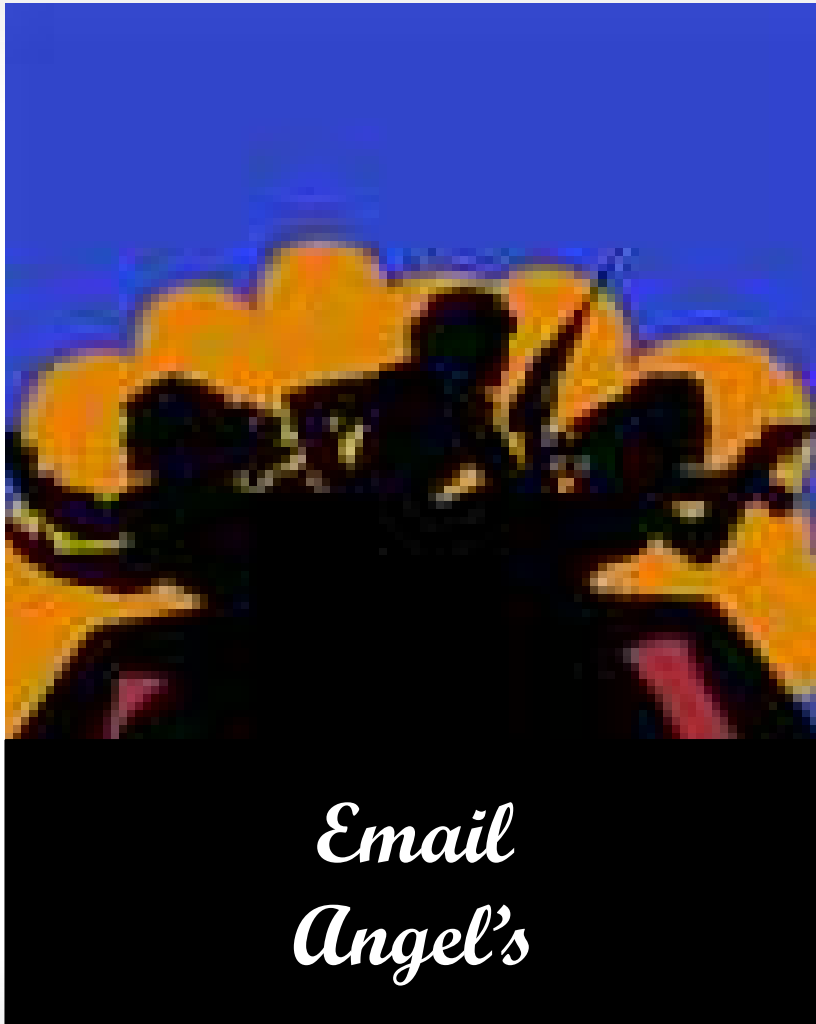# ADVANCED WEIGHT TRAINING

In this session, we will share how to build email campaigns and create messages that get read and inspire participants to take action. Topics covered include: automatic recurring emails, email segmentation, frequency, and design for desktops and mobile devices.

November 9, 2011

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your passion > our purpose

ABOUT US

Email
Angel's

Amy Braiterman
Principal Strategy Consultant
Blackbaud

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Karen Wills
Sphere Expert!
(eCRM Project Manager)

Arthritis Foundation
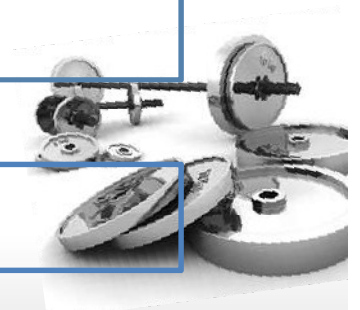
THE 5 MUST-HAVES FOR YOUR EVENT EMAIL CAMPAIGNS

1. Segment

2. Timing

3. Content "is King"

4. Well Designed

5. Holistic communications campaign

ALWAYS REMEMBER

- Email is just one of your touch points for communicating with past, current and prospective participants

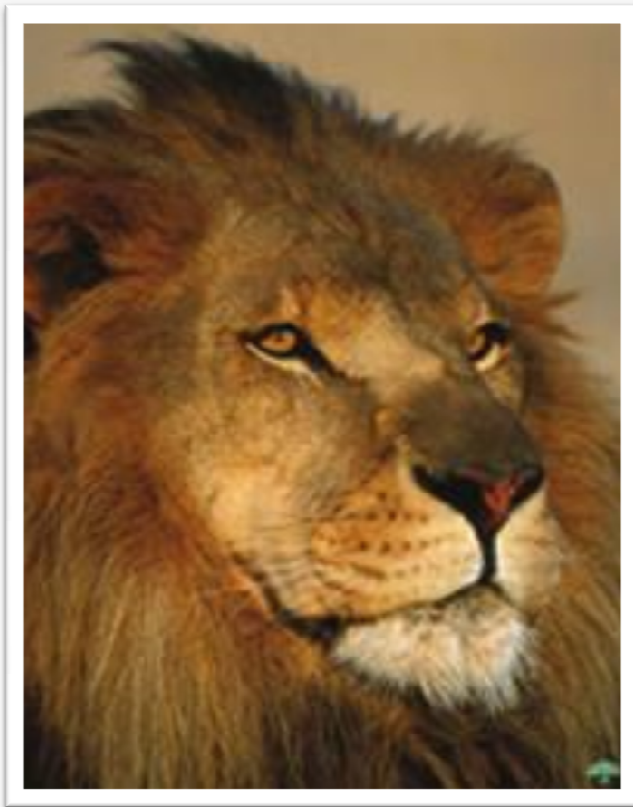- Use it in coordination with the other ways you're reaching out

- Email
- Web site
- Phone calls
- Mail
- Other media/ads
- Social networks
- Viral opportunities

TYPES OF EVENT EMAIL CAMPAIGNS

Retention

Engagement & Support

Recruitment

RECIPIENTS

➤ UNDERSTANDING FUNDRAISING BEHAVIOR

| Top Fundraisers	No $$ raised (AKA "warm bodies")	The middle tier… raising something
• Special line of communication recognizing their status is ideal • Recognize their role in the event's success • Recognize how they inspire others to be successful with their fundraising efforts	• Tell them how to use the tools • Let them know that they're *supposed to* raise money • Recognize that email may not be the way to reach them – it may take a phone call, personal email, or letter to give them a jumpstart • Decided what's your acceptable loss	• **This is where the real potential lies!** • They're already fundraising…how can you move them to the "top tier"? • Let them know about important milestones, fundraising levels • Let them know they can compete with the top fundraisers
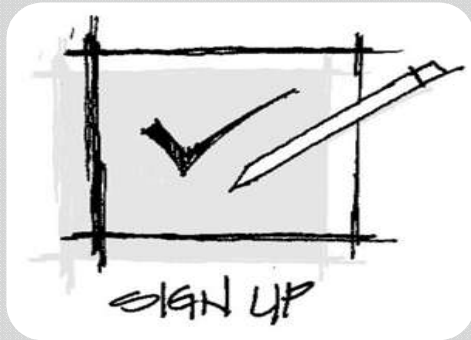
After signing up

On-going

Before event

## SIGN UP: TAKING IMMEDIATE ACTION (RECURRING)

- Use recurring emails to set up an email welcome kit
  1. Set a goal
  2. Share Your Story
     i. What story should I share?
     ii. Provide a sample or instructions
     iii. Eliminates "writer's block"
  3. Create your address book and send your group of emails
  4. Get Social! Fundraise with facebook and twitter
  5. Thank your donors

## ONGOING COMMUNICATIONS: COACHING PARTICIPANTS

TELL THEM WHAT YOU WANT THEM TO DO

- Fundraising online
  - Offer fundraising tasks, tips, challenges, goals
  - Instructions: Make sure they know how to use their online tools

- Highlight/spotlight top participants/teams
  - Keep the competition going
- Let them give you feedback!
- Mid-season survey, post-event survey
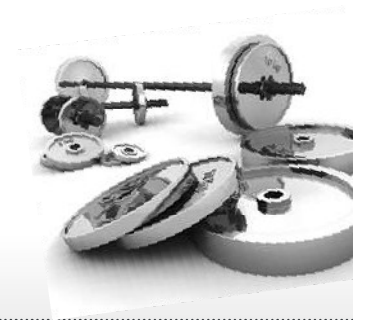
WHAT TO SAY?

- Keep it simple

- Don't overwhelm with too much information

- Mix "value copy" with fundraising motivation
  - Value copy = event details, updates, milestones
    - New sponsors on board
    - New festivities added
    - We've reach 50% of our event goal!
    - We've reached 100 teams!

- **One "call to action" per message**
  - Increases the likelihood that they'll follow through with the intended action, and won't get overwhelmed/confused

- Vary focus from message to message
  - Again…have a plan!
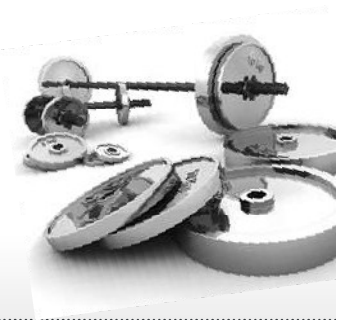
BEFORE EVENT: CAPITALIZING ON PRE-EVENT EXCITEMENT

- Re-work messages in email welcome kit
- Create special messages for $0 participants and participants who have $150+
- Focus on quick and easy tasked based messages that will result in donations
- Contests leading up to event – make them task based
- Add pictures from last year's event to your facebook page to help visualize and connect participants with the event
- Share videos from prior year's events
- Ask participants to create their own video and upload it to your YouTube channel

EVENT COMMUNICATIONS PLAN: WRITE IT DOWN

10-Jan	17-Jan	24-Jan	31-Jan	7-Feb	14-Feb
Recruitment Email 7			Recruitment Email 8		**Day of Event**
Wednesday, January 12, 2011			Wednesday, February 02, 2011		
Time-sensitive information about this year's Mutt Love			Last chance to sign up for Mutt Love!		
	Engagement Email 10		Engagement Email 11	Engagement Email 12	**Day of Event**
	Friday, January 21, 2011		Friday, February 04, 2011	Friday, February 11, 2011	
	Mutt Love on Social Media (Facebook, Twitter, YouTube)		Email challenge	This Monday's Mutt Love	
	update Facebook status ------------------ add boundless Fundraising		Send 8 emails a day for 4 days	Ask 5 friends for $10 between now and the walk	
Invite Facebook page Fans who are Mutt Love participants to invite a neighbor to join their team.	Encourage all Facebook Fans to update their status to indicate that they are walking in a few weeks and post the URL to their personal page.	Encourage all Facebook Fans to update their Profile photo to their cat or dog for one week.	Encourage all online participants to share their pet photos and include a link to their personal URL - either by emailing it or by posting it on Facebook with the sharing	Encourage all Facebook Fans to update their status to indicate that they are walking THIS MONDAY and post the URL to their personal page.	**Day of Event**
Tweet: "Are you attending Mutt Love this year? If so, invite a neighbor to join your team today!"	Encourage followers to tweet, "I am raising money for Mutt Love" and a link to their personal page URL.	Encourage followers to tweet a animal welfare fact, and then tweet their personal page URL.	Tweet, "Mutt and feline lovers - Are you taking the email challenge? Check it out in your HQ."	Encourage all followers to tweet that they are walking THIS MONDAY and post the URL to their personal page.	

Call-in number: 1-660-422-5471 / Code: 843 654 3232

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TYPES OF MAILINGS

Single

- On- going communications
- Fundraising contests
- Event details

Recurring

- Email Welcome kit
- Fundraising Incentives
- Zero dollar walker campaign

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EXAMPLE: SINGLE MAILINGS

On- going communications

Fundraising contests

Event details

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RECEIVER TEMPLATE QUERY

ENGAGEMENT SEGMENTS – LET'S GET CREATIVE

- All event donors and participants
- All event donors
- **All event participants**
- **All event leaders**
- **All event participants with emails sent >, =, or <**
- **All event participants with total raised to date >, =, or < $X**
- **All event participants with % of goal >, =, or < X%**
- All contacts that registered in previous event but not this event
- All leaders that registered in pervious event but not this event
- Other user must select receivers when send the mailing

TEAM CAPTAIN FILTER

Thanks for Jingling With Us!

Dear [[First name]] ,

Thank you again for forming a team for this year's Jingle Bell Run/Walk for Arthritis Milwaukee held at the Milwaukee County Zoo on Sunday, November 6! Please review the information below regarding team logos, recruitment details and fundraising!

The More the Merrier! Remember, **all teams must consist of 10 or more members**. Registration payments and rosters or register your team online by Monday, October 24. You may still register team members after the deadline but keep in mind, these individuals are not guaranteed a team t-shirt with the team name printed on the back. Registration is $27 for adults and $17 for children (12 & under) before October 24.

Wear it Proud! All teams have the opportunity to put their own logo on the backs of their team t-shirts! Create a logo with your team or use or corporte log. Logos MUST be submitted in editable .eps format and fit within a 12"w x 3"h area. The Arthritis Foundation reserves the right to reject any logos for any reason. **Logos can be emailed to Justine at jkipper@arthritis.org not later than Friday, October 21.**

Fundraise! The Arthritis Foundation is the only nationwide, nonprofit health organization helping people take greater control of arthritis by leading efforts to prevent, control and cure arthritis related diseases. As a participant, you are asked to raise funds to help support the mission of the Arthritis Foundation. You're making a great commitment not only to yourself, but also to your community and to the **one in five Americans** living with arthritis and related conditions. Be proud and set your goals high!

Sincerely,

Jingle Bell Run/Walk Committee

Jingle With Us!

Dear [[First name]] ,

Join us on **Sunday, November 6, 2011 at The Note in West Chester, PA at 4:00 pm** for an afternoon of music, dancing and spreading the arthritis awareness message. Featuring the **First Ladies of Rock & Soul,** who will be providing a concert of legendary songs of the Girl Groups of the 60's including: The Supremes, Ronettes, Shirelles, Chiffons, Mary Wells, Martha & The Vandellas, Crystals & many more... Our host for the evening will be Lou Costello from Crusin' 92.1 FM.

This afternoon of great entertainment is presented by Advanced Chiropractic Wellness Center which is a partner of the Arthritis Foundation. Tickets are **$25.00** which includes the enjoyable entertainment, but also a **buffet dinner donated by Limoncello** of West Chester! Tickets will be available at the door or to purchase tickets in advance please go to the concert's website at www.firstladiesofrockandsoul.com/arthritis.

Please come out and enjoy some classic 60's music, enjoy a delightful meal from Limoncello and help us raise funds to support the Arthritis Foundation. There will also be opportunities for guests to register at the event for the 22nd Annual Jingle Bell Run/Walk for Arthritis which is schedule for Sunday, December 11th at the General Wayne Elementary School in Malvern, PA. Register online for the Malvern Jingle Bell Run/Walk at www.jbrphilly.kintera.org.

Sincerely,
Jingle Bell Run/Walk Committee

The Note is located at 142 E. Market Street, West Chester, PA

EXAMPLE: RECURRING MAILINGS

Email Welcome kit

Fundraising Incentives

Zero dollar walker campaign

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BENEFITS OF USING RECURRING EMAILS

- The same message content sent multiple times to target audience

- Send target messages

- Queries to target specific receiver

- Can be a one time set up & schedule

- Ability to make edits in content, receivers and schedule

- Schedule can be daily, weekly., monthly or yearly

- Example:
  - Team Captain Welcome Kit
  - Zero Dollar Walker Campaign
  - **Incentive Prizes**

Arthritis Walk

Saturday, May 7, 2011

Greater Hartford Arthritis Walk
Saturday, May 7, 2011
Saint Joseph College, West Hartford
Registration begins at 9:00am

Dear Team Captain,

Thank you for agreeing to be a Team Captain for the Greater Hartford Arthritis Walk. We appreciate your support as we know the strength and success of this event lies in the commitment of people like yourself.

Fighting arthritis is a team effort. The power of people coming together for a common cause is greater than the power of one. Recruiting for the Arthritis Walk is easy! You'll want to start by asking everyone you know if they are interested in helping you find a cure for arthritis by joining your team. Teams can include family, friends, and coworkers. Each walker who reaches the $100 level will receive an official Walk T-shirt.

We will contact you to make arrangements to get you your Team Captain Kit. This will contain all the tools you'll need to help you organize a successful team.

Once again, thank you for your commitment to making this year's Arthritis Walk a success. If you should have any questions or concerns about the Arthritis Walk, pleas do not hesitate to contact me by calling 860-563-1177 or via e-mail at Lperkins@arthritis.org.

We look forward to seeing your team at the Arthritis Walk!

Sincerely,

Luellen Perkins
Regional Walk Director

David Ellovich
Co-Chair

Erin Hart
Co-Chair

2011 Greater Hartford Arthritis Walk
Register now at www.greaterhartfordaw.kintera.org!

You are almost there!

Congratulations Nancy,

With your help we are on our way to reaching our goal of {$ goal for event} for the Jingle Bell Run/Walk. Thank you for helping raise funds to fight arthritis pain.

We wanted to let you know that you are just a few dollars away from the next Reward Level in our National Fundraising Incentive Program. These rewards include iPods®, Trek® Bikes, Digital Cameras and over 50 other incentive prizes. Visit www.jbrprizes.afgear.org to review the prizes offered and to see the next level of prizes we are offering to motivate hard workers like you to reach and exceed fundraising goals!

Your efforts help us carry out our mission to improve the lives of the 50 million people affected by arthritis, the nation's most common cause of disability. Keep up the good work!

Login to your HQ now to send more emails to family and friends.

Sincerely,
Jingle Bell Run/Walk Committee

$250

Stainless Water Bottle

Designer T-shirt

Uptown Lunch Cooler

Messenger Bag

Your Login Info

Username: NBell2011
Password: ************
Log In Now

Do not know your password?
Click here to reset.

Follow Us:

- Goal to target participants who have achieved the $100 fundraising level, but have Not progressed to the $250 level

- Use the **Funds Raised filter** to build a receiver query

- Incentive Prize range - $100 - $249 (funds raised >= 100 AND funds raised <= 249)

- Query Operator – AND (to capture all participants who meet the filter criteria)

Community - 2011 Jingle Bell Run/Walk - TRAINING Do Not Use

All Participants in Event(s)

Additional Filters

	Registration Date	--- Select --- ▾		📅
	Source Code Name	--- Select --- ▾		
☑	Funds Raised	>= ▾	100	
	Team Member	= ▾	--- Select --- ▾	

OK   Cancel

Query

2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised >= 100
AND 2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised <= 249

Target audience is participants who have funds raised between $100 - $249

Communities
  Special Events
    Friends Asking Friends
      Kintera Thon (Choose Event
        Participants
        Donors
        Team Leaders
        Volunteers
        Auction Registrants
        eCommerce Purchaser
        [Please select yout top 3
        [October 5, 2009 - Dalla:
        [October 17, 2009 Wash
        [Test Question]
    House Party or Meeting Ever

Add->
<-Remove
<-Remove All

Edit..   (+ (-   +) -)   And Or Not Up Down

☐ Individuals   ☐ Organizations   ☐ Units

Preview   Save to Query Library   Save   Done   Cancel

Query Saved

11/09/2011

- Save query to the Query Library

- Saved Queries can be reused

- Save query as a recognizable name to be able to locate again

Query

2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised >= 100
AND 2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised <= 249

Add->

<-Remove

<-Remove All

Save the Query

Edit..   (+   (-   +)   -)   And   Or   Not   Up   Down

☐ Individuals   ☐ Organizations   ☐ Units

Preview   Save to Query Library   Save   Done   Cancel

https://www.kintera.com/?QueryID=1332641&IsLibrary=true&IsC...

Save to Query Library

You've chosen to save the current query to the library. It can be reused when building other queries.

*Library Name: Incentive Prize Query

Submit   Cancel

Dynamic Query Library - This table lists all dynamic queries that you have built and saved to the library. Select one by clicking on the radio button beside the query name.

Query is saved in the Dynamic Query Library

| Search for | Name ▾ | Starts With ▾ | Incentive Prize | Search | Show All |

Select Initial: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing 1-2 of 2 Dynamic Query Items (1 page), 50 ▾ Dynamic Query Items per page.

Prev 1 Next

	Name ▾	Owner	Date Last Modified
○	Incentive Prize Query	Karen Wills	8/1/2011 2:01:37 PM

Query Name - ReceiverQuery_1328345

Available Items ? Field Glossa

- ⊞ 📁 Contacts
- ⊞ 📁 Members
- ⊞ 📁 Communities
- ⊟ 📁 Saved Queries
  - 🔍 Dynamic Query Library ←
  - 🔍 Static List Library
  - 🔍 Legacy Query Library
  - 🔍 Premium Query Library
- ⊞ 📁 Communication

To reuse a saved query – select the Saved Queries folder and drill down to the Dynamic Query Library

Dynamic Query Library - This table lists all dynamic queries that you have built and saved to the library. Select one by clicking on the radio button beside the query name.

| Search for | Name ▾ | Starts With ▾ | Incentive Prize | Search | Show All |

Select Initial: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing 1-2 of 2 Dynamic Query Items (1 page), 50 ▾ Dynamic Query Items per page.

Prev 1 Next

Search for the Query name

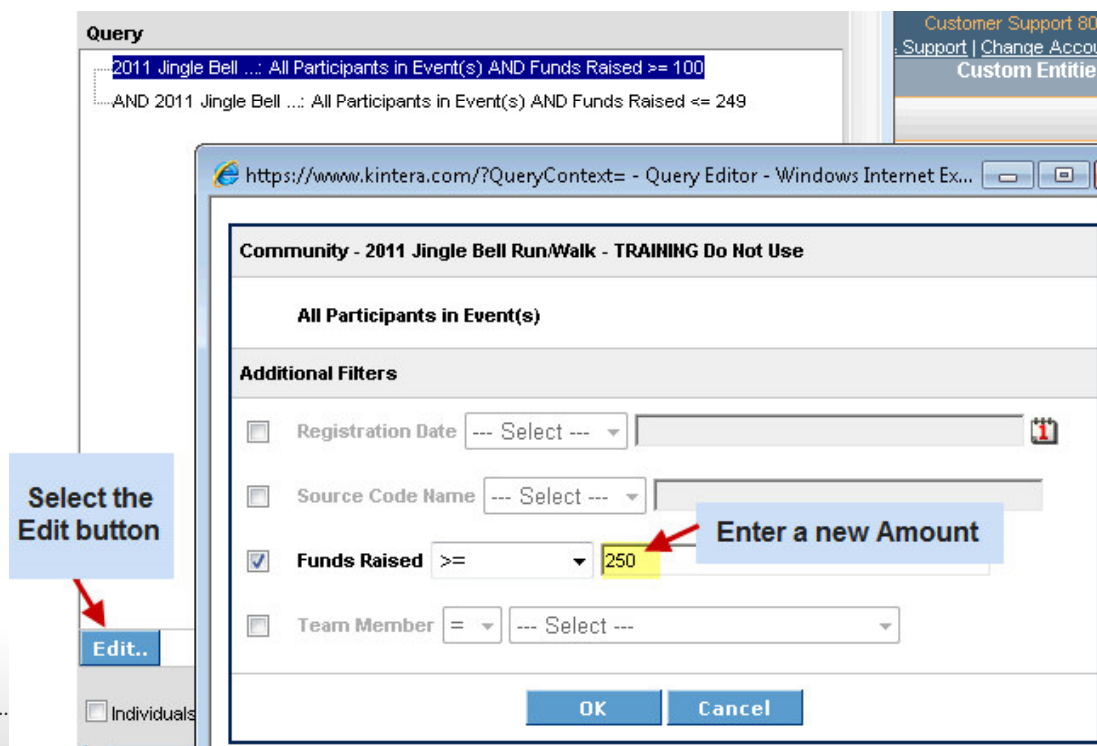|	Name ▾	Owner	Date Last Modified
○	Incentive Prize Query	Karen Wills	8/1/2011 2:01:37 PM

Saved query will populate in the query window

When needed the save query criteria can be edited

New goal to target participants who have achieved the $250 fundraising level, but have Not progressed to the $350 level

Query Name - ReceiverQuery_1328345

Available Items   ? Field Glossary   Query

⊞ 🗀 Contacts   2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised >= 100
⊞ 🗀 Members   AND 2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised <= 249
⊞ 🗀 Communities
⊟ 🗀 Saved Queries
      🔍 Dynamic Query Library
      🔍 Static List Library
      🔍 Legacy Query Library
      🔍 Premium Query Library
⊞ 🗀 Communication

                      Add->
                      <-Remove
                      <-Remove All

Query

2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised >= 100
AND 2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised <= 249

Customer Support 800
Support | Change Accou
Custom Entities

🔍 https://www.kintera.com/?QueryContext= - Query Editor - Windows Internet Ex...

Community - 2011 Jingle Bell Run/Walk - TRAINING Do Not Use

All Participants in Event(s)

Additional Filters

☐ Registration Date --- Select --- ▼   🗓️

☐ Source Code Name --- Select --- ▼

☑ **Funds Raised** >=   ▼ 250   ← **Enter a new Amount**

☐ Team Member = ▼ --- Select ---   ▼

              OK   Cancel

Select the Edit button

Edit..

☐ Individuals

Incentive Prize range - $250 - $349 (funds raised >= 250 AND funds raised <= 349)

Query Name - ReceiverQuery_1328345

Available Items   [?] Field Glossary   **Query**

- [+] Contacts
- [+] Members
- [+] Communities
- [-] Saved Queries
  - Dynamic Query Library
  - Static List Library
  - Legacy Query Library
  - Premium Query Library
- [+] Communication

2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised >= 250
AND 2011 Jingle Bell ...: All Participants in Event(s) AND Funds Raised <= 349

Target audience is participants who have funds raised between $250-$349

Add->

<-Remove

Customize the message content for the $350 prize level receivers and schedule to send

Jingle Bell Run/Walk for Arthritis
Arthritis Foundation

ARTHRITIS FOUNDATION®

You're getting awfully close!

Congratulations Nancy,

With your help we are on our way to reaching our goal of {$ goal for event} for the Jingle Bell Run/Walk. Thank you for helping raise funds to fight arthritis pain.

We wanted to let you know that you are just a few dollars away from the next Reward Level in our National Fundraising Incentive Program. These rewards include iPods®, Trek® Bikes, Digital Cameras and over 50 other incentive prizes. Visit www.jbrprizes.afgear.org to review the prizes offered and to see the next level of prizes we are offering to motivate hard workers like you to reach and exceed fundraising goals!

$350
Mp3 Player
Insulated Designer Tote
Soft Silky Pashmina
Sports Duffle Bag

RECURRING MAILING SCHEDULING PROVIDES TWO RECEIVER OPTIONS

Schedule this Mailing

Receive this mailing multiple times

Send to:

◉ Any user who meets the criteria (users could potentially receive the mailing more than once)

○ Users who have not received this mailing before (A user will only be sent this mailing once, even if they meet the criteria at future mailing dates)

Schedule this Mailing

Receive this mailing one time

Send to:

○ Any user who meets the criteria (users could potentially receive the mailing more than once)

◉ Users who have not received this mailing before (A user will only be sent this mailing once, even if they meet the criteria at future mailing dates)

EDITING RECURRING EMAILS

- Even after the mailing starts sending, changes can be made to the query receivers list, mail content or the schedule at any time

- A Stop Recurring Mailing option is provided for Scheduled (Open) mailings

Locate your mailing and display View Occurrences

Mailing Name ▲	Mailing Type	Date Modified	Campaign Name	Owner/Collaborator	Receivers	Content	Schedule	Status
$350 Incentive Recurring	Email User	8/4/2011	2011 AW & JBR St. Louis	Karen Wills	ReceiverQuery_1328345	Content_1869731	Recurring	Scheduled
$250 Incentive Recurring	View Occurrences	8/1/2011	2011 AW & JBR St. Louis	Karen Wills	ReceiverQuery_1328341	Content_1869726	Recurring	Scheduled
Team Building Test	Property Single Mailing	7/19/2011	2011 AW & JBR St. Louis	Karen Wills	ReceiverQuery_1326436	Content_1854093	7/19/2011 2:18:42 PM	Closed

| Mailing Name ▲	Date Modified	Owner/Collaborator	Receivers	Content	Schedule	Status
$350 Incentive Recurring Test	7/25/2011	Karen Wills	ReceiverQuery_1328345	Content_1869731	7/26/2011	Closed
$350 Incentive Recurring Test	7/26/2011	Karen Wills	ReceiverQuery_1328345	Content_1869731	8/2/2011	Closed
$350 Incentive Recurring Test	8/2/2011	Karen Wills	ReceiverQuery_1328345	Content_1869731	8/9/2011	Open

Stop Recurring Mailing   Select Stop Recurring Mailing button for Open mailings

ALSO REMEMBER TO:

- Segment your audience – use template queries
- Create custom messages based on queries
- Use emails to engage with participants and drive online activity
- Start early, have a plan, and set the expectation
- Always have a clear call to action
- Keep it short, sweet, and scannable
- Ask for feedback, and refine your results for next year's eCommunication plan!
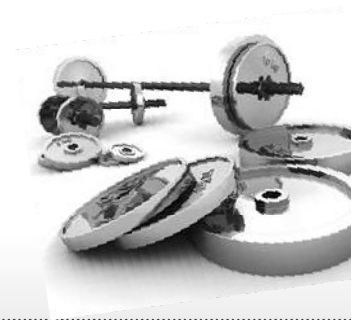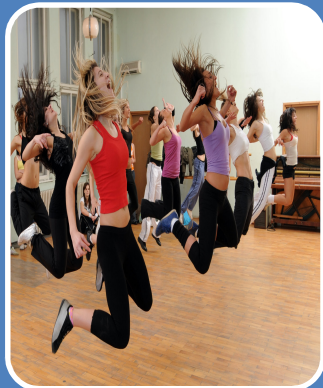
BOOT CAMP SCHEDULE

The Machine You Never Use

- Thursday, November 10, 2011
- Committee management, tracking expenses, My HQ communications. Plus… advanced reporting

Bonus Session: Group Training

- Tuesday, November 15, 2011
- Here from your fellow fundraiser on what their doing to increase their fundraising muscle

WANT TO LEARN MORE? BE SURE TO CHECK OUT...

Blackbaud Blogs

http://www.FriendsAskingAmy.com

http://www.NetwitsThinkTank.com

Friends Asking Amy
The blog with fun and fresh ideas for peer-to-peer fundraising events.

Need Inspiration?