



Is it time to **transform marketing**
at your organization?

MEASURING PERFORMANCE AND DEMONSTRATING ROI

Presented by:

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► **MEASURES THAT MATTER**

- Return on Investment (ROI)
- Return of Mission (ROM)
- Trust
- Loyalty



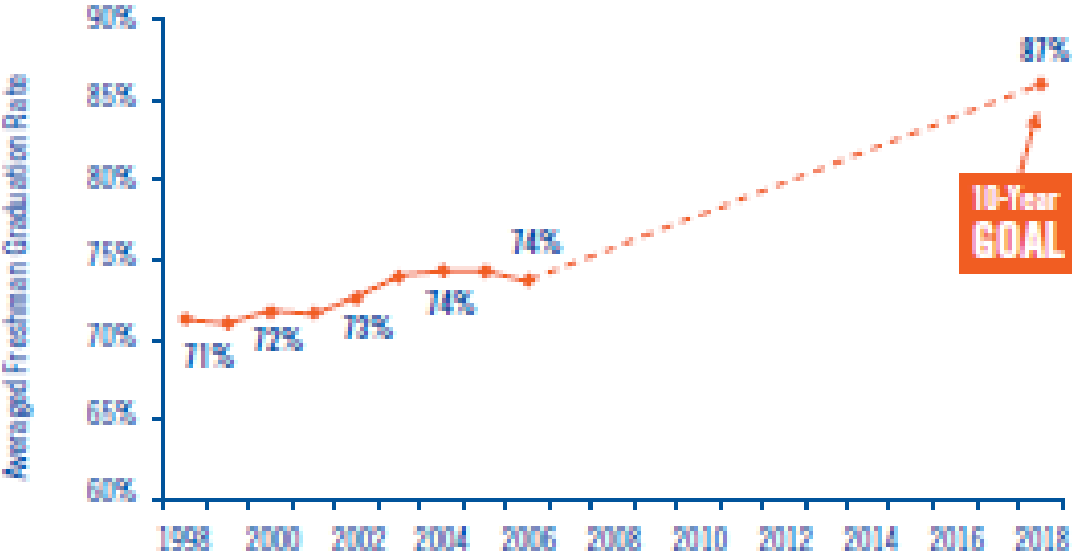
United Way
Brand Scorecard

DIFFERENTIATION	REACH	RELATIONSHIP
Brand Value: \$ Billions	# Investor/Donors: Millions	Trust United Way: %
Effective in Advancing the Common Good: %	# Volunteers: Millions	Net Promoter Score: NPS
Makes a Difference in: Education: % Income: % Health: %	% Asked to give:	Thanked: %
Enables Me to Make Difference: %	Top of Mind Awareness: %	Informed/Received Information: %
LIVE UNITED Awareness: %	% Giving:	Lets Me Know Value of My Contribution: %
LIVE UNITED Attribution to United Way: %	# Reached in Workplace Campaigns: Millions	Churn: % Lapsed donors
	Total Media Awareness: % Advertising: Traditional Media: Online Media:	
	Total Donated Media: \$ Millions	
	Earned Media Value/PR: \$ Millions	
	Public Web Site: Total "touchpoints" Web Visits: Flickr: YouTube Video Views: Twitter Connections: Facebook:	
	Total Donated Online: \$ Millions	
	Total Online Supporters/Emails: Millions	
Source of Data on Scorecard: 1. United Way Brand Value calculated by Interbrand and by Forbes.com/WPP's Mindshare (World's Most Valuable Brands) 2. Net Promoter Score calculation: See Page 32. 3. Ratings from United Way annual public opinion tracking study		



Education, Income & Health 2018 Goals

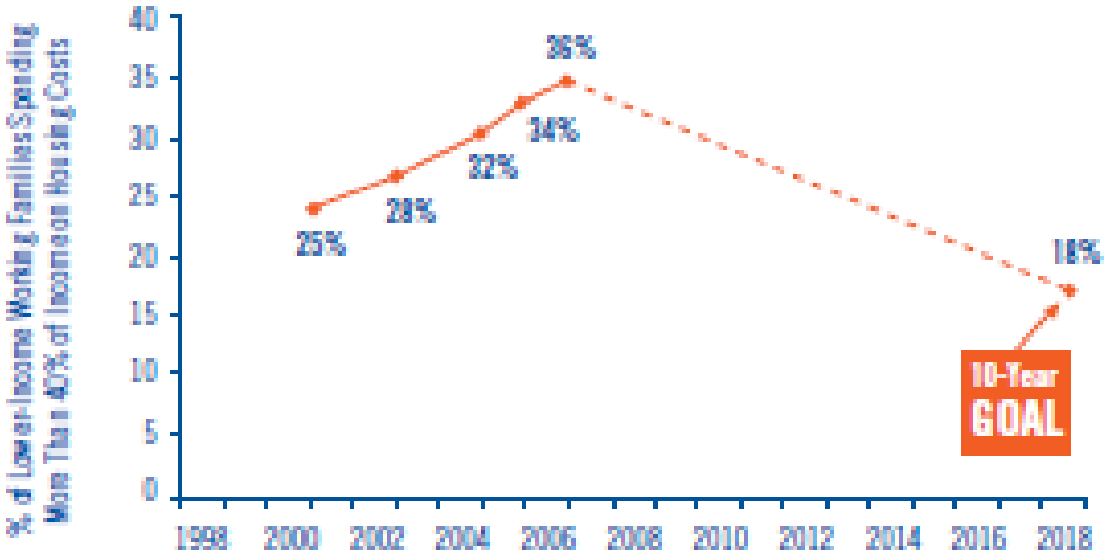
EDUCATION 10-YEAR GOAL: Raise the Graduation Rate



SOURCE: COMMON CORE OF DATA, NATIONAL CENTER FOR EDUCATION STATISTICS

Education, Income & Health 2018 Goals

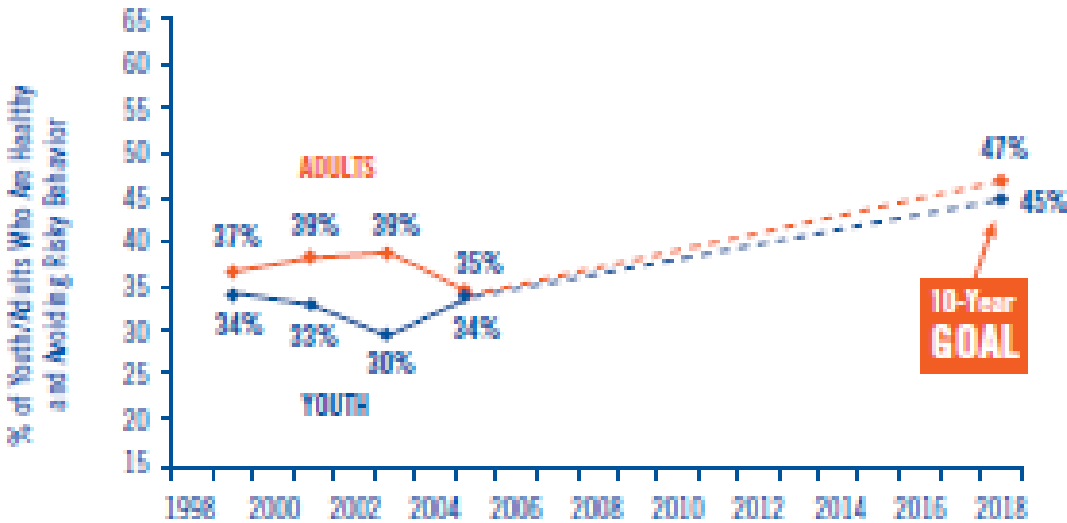
INCOME 10-YEAR GOAL: Reduce the Number of Lower-Income Working Families Who Are Financially Unstable



SOURCE: AMERICAN COMMUNITY SURVEY

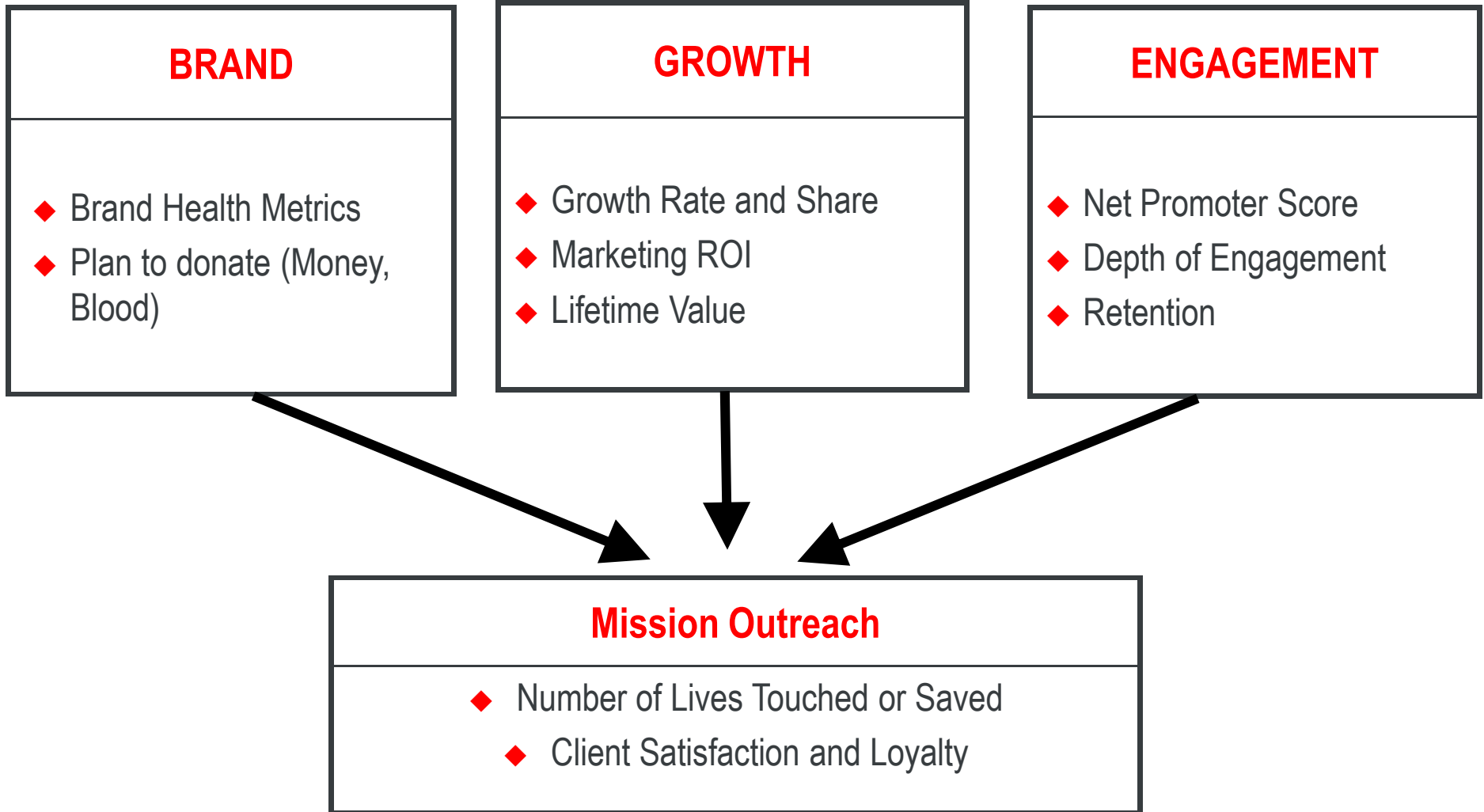
Education, Income & Health 2018 Goals

HEALTH 10-YEAR GOAL: Increase Youth/Adults Who Are Healthy and Avoiding Risky Behavior



SOURCE: YOUTH RISK BEHAVIOR SURVEY AND BEHAVIOR RISK FACTOR STUDY, CENTERS FOR DISEASE CONTROL AND PREVENTION

MARKETING DASHBOARD





▶ AN EXAMPLE – SPECIAL EVENTS ROI

- Common framework to evaluate events
- Gross revenues – expenses = net revenues
- Includes all revenue and expenses including donated / In-Kind
- Net revenue compared to opportunity cost



➤ **AN EXAMPLE – SPECIAL EVENTS ROI**

Revenue

- Corporate sponsorships
- Individual sponsorships
- Exhibit/advertising fees
- Tickets – event
- Tickets – raffle
- Food & beverage sales
- In-Kind donations – event specific
- Total auction revenue donations
- Other revenue

➤ AN EXAMPLE – SPECIAL EVENTS ROI

Non – Personnel Expenses

- Facility fees
- Auction reimbursement
- Equipment rental (tables, chairs, etc.)
- Permits
- Promotional materials (t-shirts, goodie bags)
- Advertising & outreach materials
- Advertising outreach design costs
- Printed materials
- Food & beverages
- Value of complimentary tickets
- Security & service cost
- Speaker fees
- Transportation / travel costs
- Entertainment & photography / videography
- Postage & mail services
- Prizes & appreciation gifts
- Supplies



► TIPS FOR IMPLEMENTING SUCCESSFUL MEASUREMENT PROGRAM

- Laser focus on value proposition for stakeholders
- Be resourceful
- Craft the ROM story
- Find a champion at the board level
- Hire and train talented people
- Get creative and experiment



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JULY 11-13, WASHINGTON, DC



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