

Using Fast Data to Drive Quality in Regular Giving Acquisition and Reactivation

INDIVIDUAL GIVING TRACK

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Cerebral Palsy Alliance



CONFERENCE

Individual Giving Track
Sponsored By:

Robejohn



Acknowledgement of Country

We acknowledge the Traditional Custodians of Country throughout Australia and recognise their continuing connection to land, waters and community. We pay our respects to Aboriginal and Torres Strait Islander cultures; and to Elders past and present.

Artwork by Leah Cummins, a proud Mayi woman from North-Western Queensland



every
20hrs

an Australian child is
born with cerebral
palsy

Using fast data to drive quality in RG acquisition and retention

Cerebral Palsy Alliance (CPA)

CPA's quality ethos

Defining and measuring quality

Importance of fast data

MSX survey in acquisition and retention campaigns

Opportunities

Key learnings



Fundraising at CPA – clear goal

Reduce the number of babies born in Australia with cerebral palsy

1 in every 700
babies
today

1 in every 1000
babies
by 2030



Fundraising at CPA – clear goal

Reduce the number of babies born in Australia with cerebral palsy

Established team

Diverse fundraising portfolio

36% of net revenue comes from RG net revenue in last 5 years

FY25 target: \$30M in FY25 (excl bequests)

Low brand awareness

40,000 RGs – CPA's Big Family

91% of RGs acquired via F2F





CPA's approach to RG quality - evolution



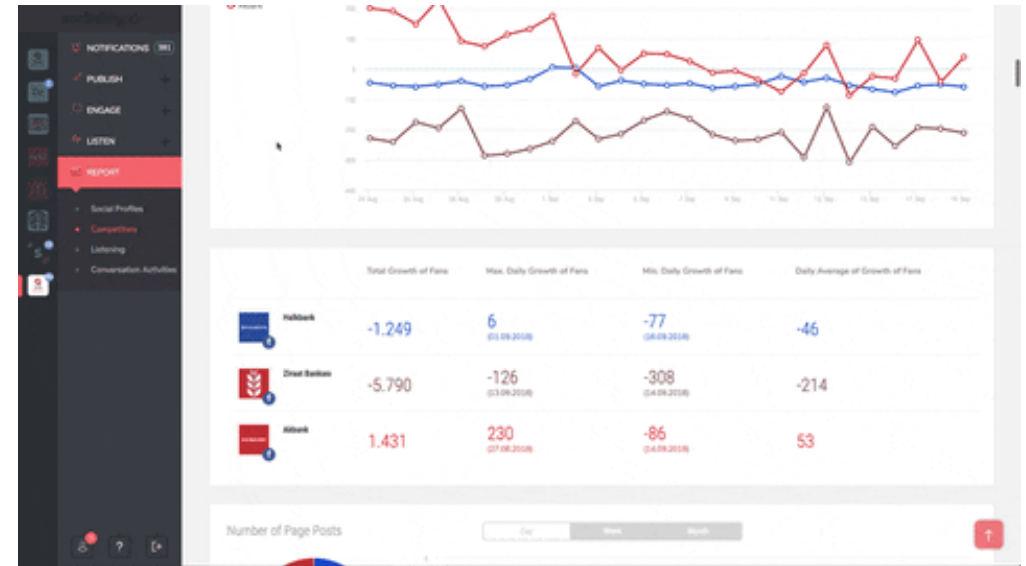
Smaller team, limited resources

Focus on what had the biggest impact on quality

Built 'quality'-focused KPIs into acquisition tactics

"If you get rubbish in, you get rubbish out" ethos

CPA's approach to RG quality - evolution



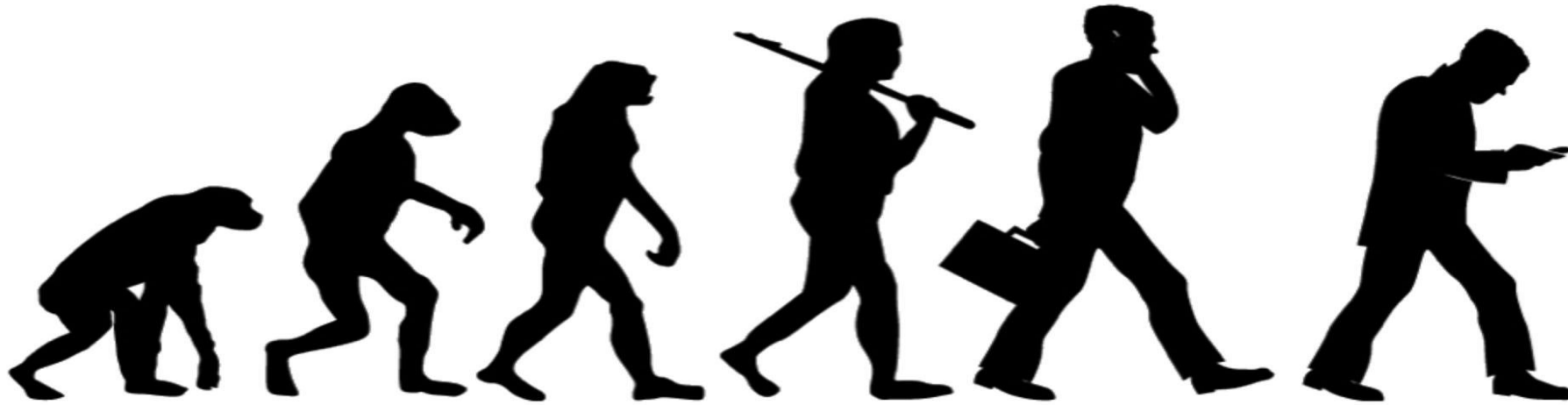
- Smaller team, limited resources
- Focus on what had the biggest impact on quality
- Built 'quality'-focused KPIs into acquisition tactics
- "If you get rubbish in, you get rubbish out" ethos



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- Larger team, greater resources
- Ability to enhance donor experience, improve retention
- Developing two-way dialogue, nudge, extend and save RGs

CPA's approach to RG quality - evolution



Retention starts at acquisition

**Donor experience, 2-way dialogue,
nudge & extend**

What do we mean by *quality*?

RGs understand CPA's need for long-term commitment (maximum impact with a minimum of 2 years)

Partner with reputable F2F agencies and sub-contractors committed to quality and training

Age based fee structures: 25-30yrs, 31-39yrs, 40-75yrs

Campaign KPI = 45% over 40 years (prioritise older RGs)

Campaign KPI = 70% verification/welcome call + call recordings

Tight management of monthly gifts amounts

Maximum contactability: Mobile + email + mail

Regular fundraiser training and engagement

Mystery shopping – fundraisers and CPA's internal processes

Locations management – knowing where *not* to fundraise

Strong lines between Donor Support team and F2F acquisition team



Measuring RG quality

Slow

- Monthly
- Transaction-based

- Attrition – F2F agency, sub-contractor, fundraiser, age, postcode, payment type, verification call
- 1st gift rates - success, cancellation, decline, on hold
- Declines reasons
- Age group proportion, age group success rates
- Average gift
- Cost per acquisition
- ROI, IRR, BE

Fast

- Daily/instant
- Sometimes slanted towards negative sentiment

- Cancellations
- Complaints
- Social media comments
- Feedback via phone, email, word of mouth
- EDM open, click-through rates
- TM contact, conversion rates
- Meta ad performance
- **MSX survey**





Introduction to MSX

Send a short survey after signup

Data is delivered to More Strategic and uploaded into Qualtrics

Based on the survey responses around experience and motivations each supporter is allocated into a segment and is delivered differentiated content

A series of inbuilt business rules mean email alerts are automatically triggered to an internal representative (s) of the charity to take appropriate action

a simple methodology to listen to and address supporter needs in the moment

01

Timing

1pm v 7pm

02

Channel

SMS v Email v 2-way

03

Content

Subject lines, content, nudges, images

04

Questions

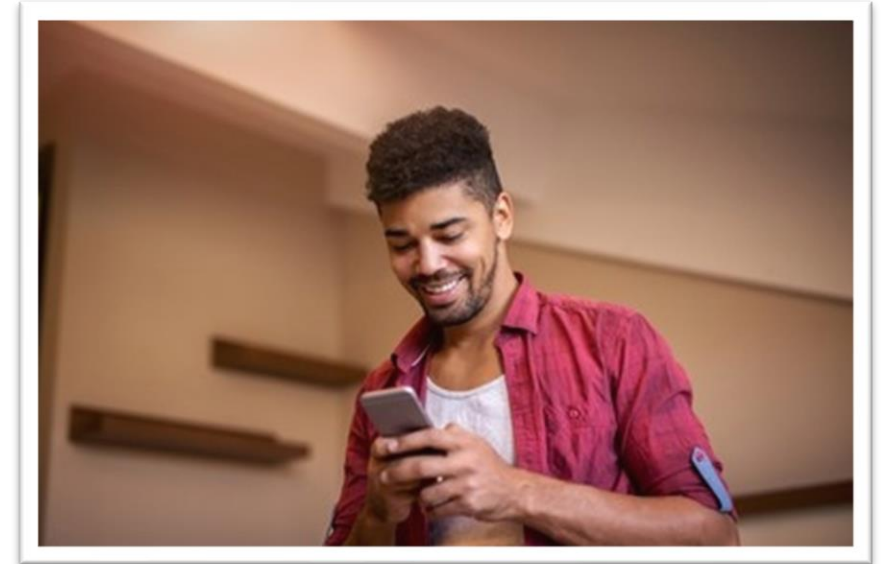
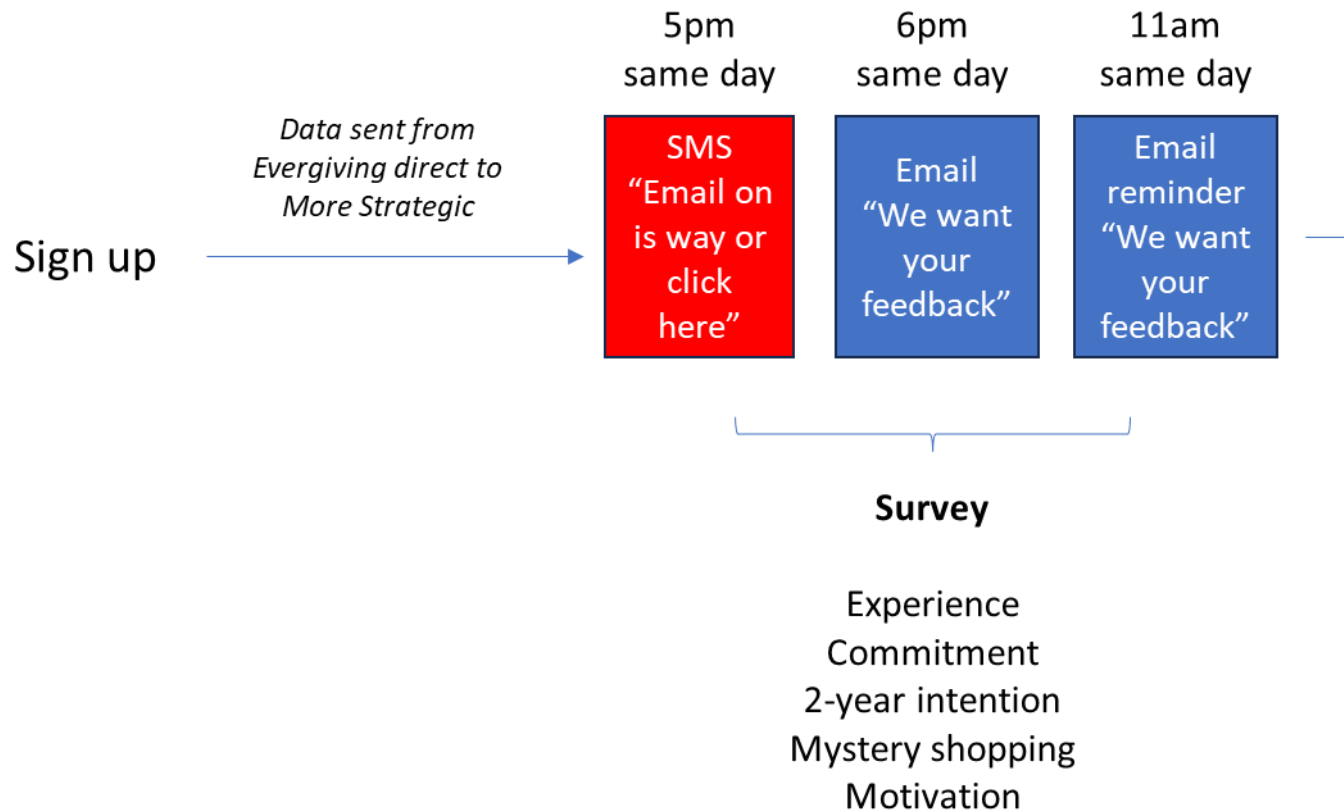
Questions, choices, order, format

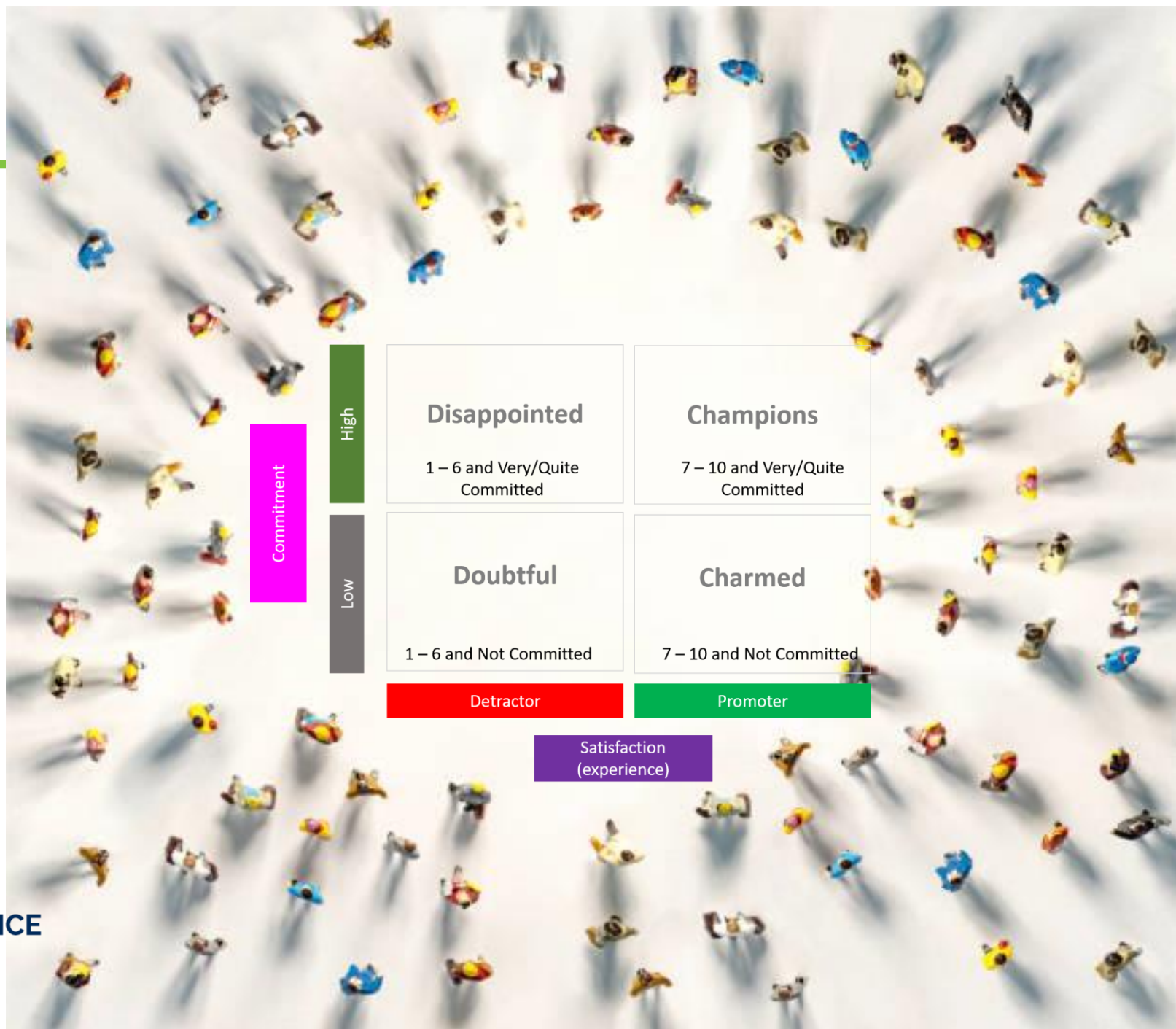
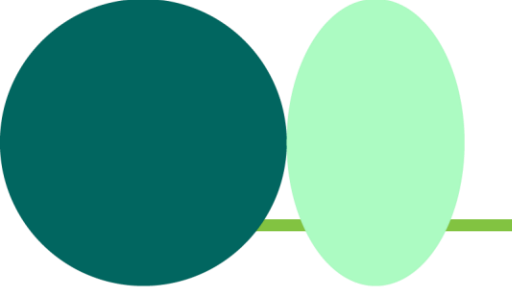
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Triggers

Business rules

Data Flow





Objectives

Agency Management

Comparability, Agent management, value

Quality

Identify "at risk" supporters, find VIP's

Motivation

Segments and sentiment for use in journey

Engage

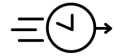
Dialogue, test and learn, apply elsewhere

Brand

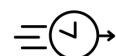
Representation, right thing, media defence

MSX survey for F2F RG acquisition

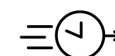
Day 1



Day 1 at 7pm



Day 2 at 11am



Day 2 Fast Data
to drive quality

Engagement /
commitment levels

Experience scores

Motivations

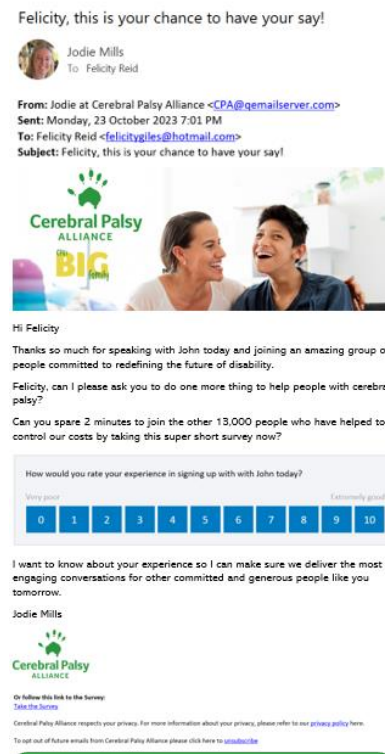
Extended interests

Connection to cause

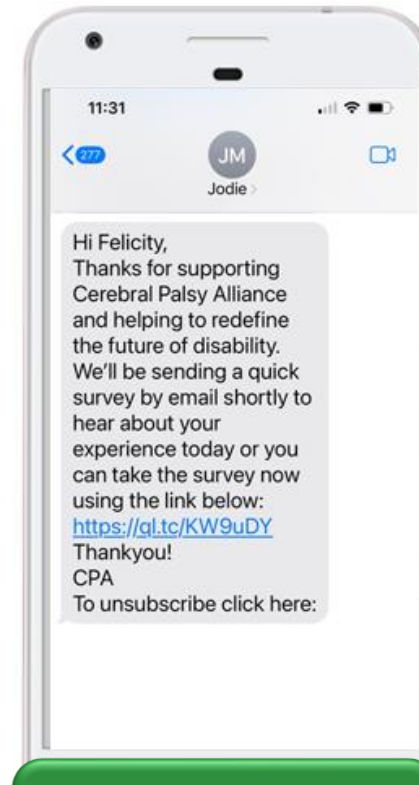
Sentiments



Conversation with F2F
fundraiser



RG receives email
survey



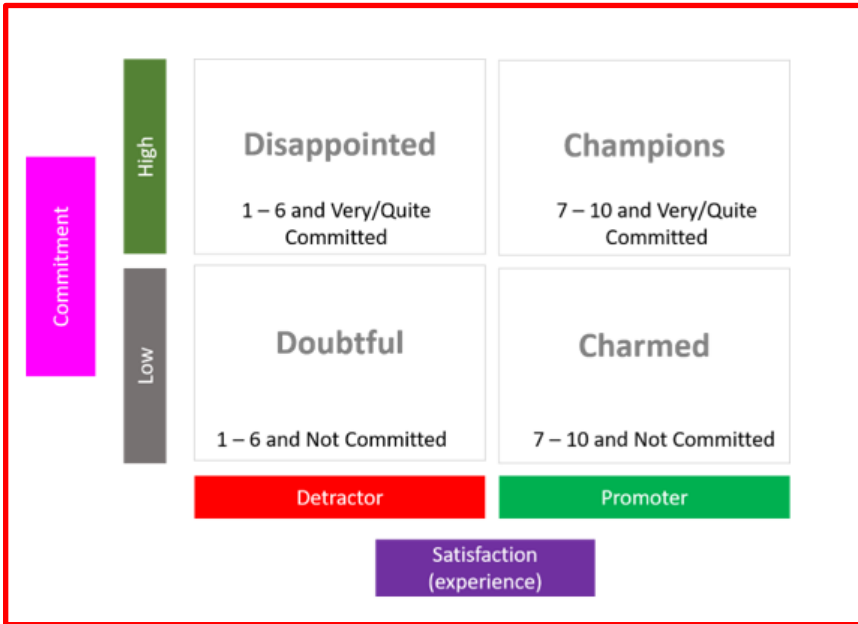
RG receives SMS
survey
(if no reply)

Fast data – MSX survey for F2F acquisition

Thank you, Taylor for taking the time to chat to Travis and signing up as CPA's newest Big Family member.

- How would you rate the experience? *> score 1 – 10.* We would love to know more about why you gave that score. *>free text*
- How committed are you to supporting Cerebral Palsy Alliance? *>choice of 5 prompts*
- Do you think you will still be giving to CPA in 2 years? *If 'probably not' or 'definitely not'* > What are the top 2 main reasons you may not be giving in 2 years? *> choice of 11 prompts*
- We're committed to ensuring our fundraisers uphold our brand and exceed our supporter's expectations. We'd love your feedback on how we did. Please indicate whether you agree or disagree with the following statements.
> statements related to fundraiser's delivery of donor impact, need for long-term giving, passion/inspiration, presentation, pressure
- Have you ever spent significant time with someone who has a disability? If yes, what is the relationship? *>choice of 5 prompts*
- Would you be interested in doing more to support the work of CPA? If yes, which of the following would you be interested in hearing about? *> choice of 5 prompts*

Using MSX data to drive quality in CPA's F2F acquisition



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- Experience
- Commitment
- 2-year intention
- Mystery shopping
- Motivation



Quality Control & Brand Protection

Agency Management

Tailored Fundraiser Training

Enhance RG Engagement



MSX provides F2F quality control

Tuesday	
Martin Paul CPA - Potential to cancel or made comment CAUTION: This email originated from outside of the organisation. Do not click	Tue 20/02 Inbox
Martin Paul CPA - Potential to cancel or made comment CAUTION: This email originated from outside of the organisation. Do not click	Tue 20/02 Inbox
Martin Paul F2F Sign up survey willing to do more for CPA CAUTION: This email originated from outside of the organisation. Do not click	Tue 20/02 Inbox
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Martin Paul CPA - Validation Required (Not giving in 2 years) CAUTION: This email originated from outside of the organisation. Do not click	Tue 20/02 Inbox
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- Tangible link between field and office
- Empathy for frontline fundraisers
- Immediately identify donor segments
 - RGs 'at risk'
 - Vulnerable
 - Buyers' remorse
 - Champions
 - Bequest prospects
- CPA can act to repair, save, cancel before we pay

Shift to one-off donation
"I am not able to continue with support after chatting to my husband, as we have a joint account, however, I am happy to make a one-off donation to CPA and provide as and when I can."

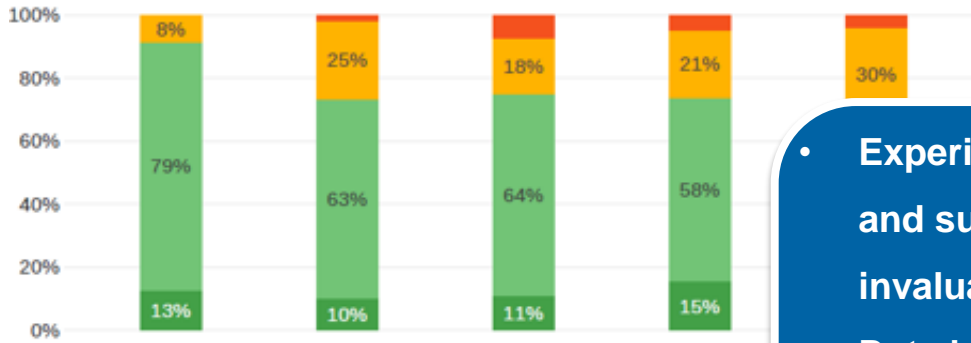
Identification of vulnerable donor – cancel and follow up with fundraiser
"I am housebound and disabled myself now but I used to do volunteer and take part in fundraising events. Keep up the good work."

Buyers' remorse can be cancelled before CPA is charged by agency
"I am not able to continue with support after chatting to my husband, as we have a joint account, however, I am happy to make a one-off donation to the charity and provide as and when I can."

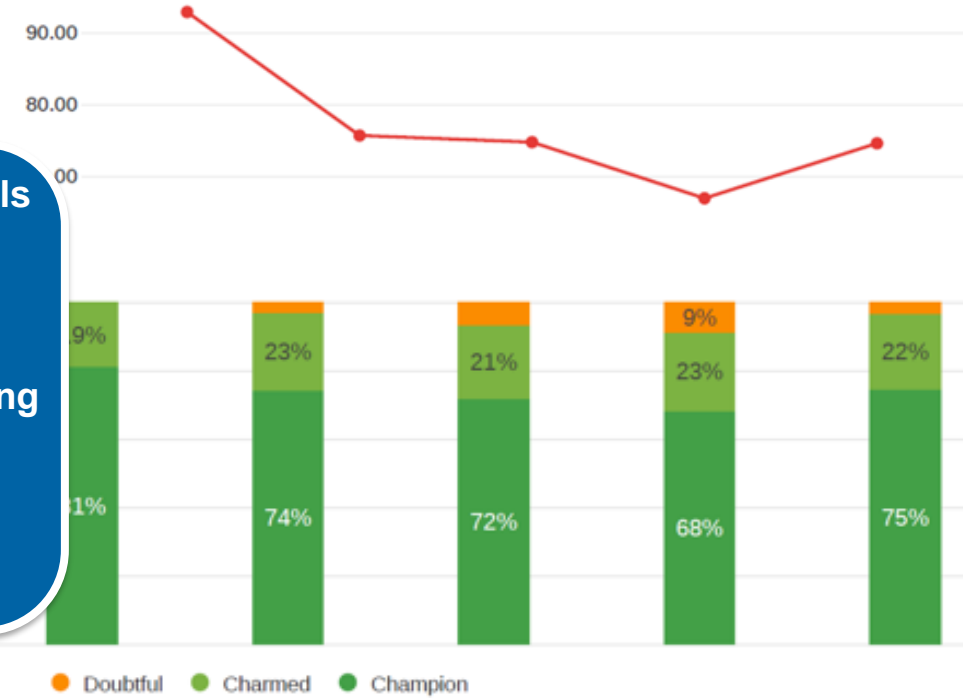
Reach out to RG and suggest a lower amount
"I have taught several students with Cerebral Palsy over many years. These students have had a range of disability, one being a Paralympian Gold Medalist to others that had mobility difficulties and gross fine motor skill disabilities. My wife has recently retired and I have ongoing serious (and costly) health issues and will likely retire in 2025 so I am not sure I can commit to \$420 annually. It's the largest charitable donation we have ever made."

MSX supports F2F agency management

Do you think you'll still be giving in 2 years?

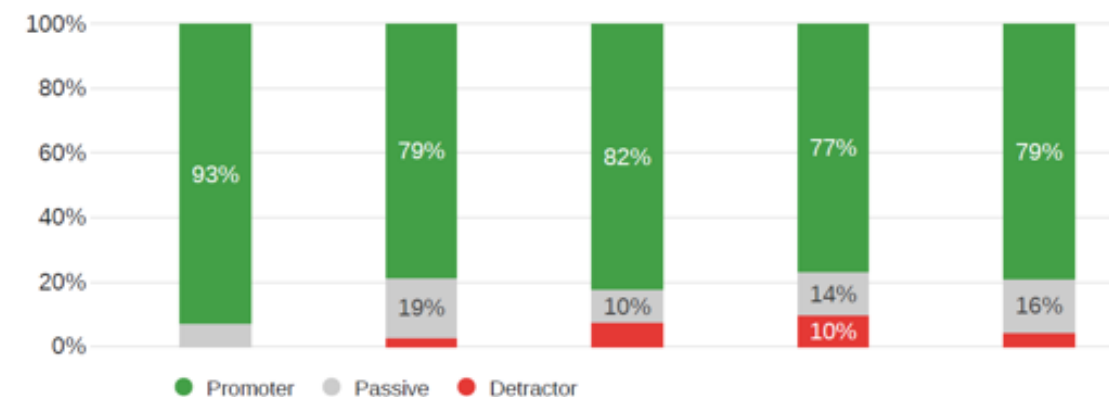
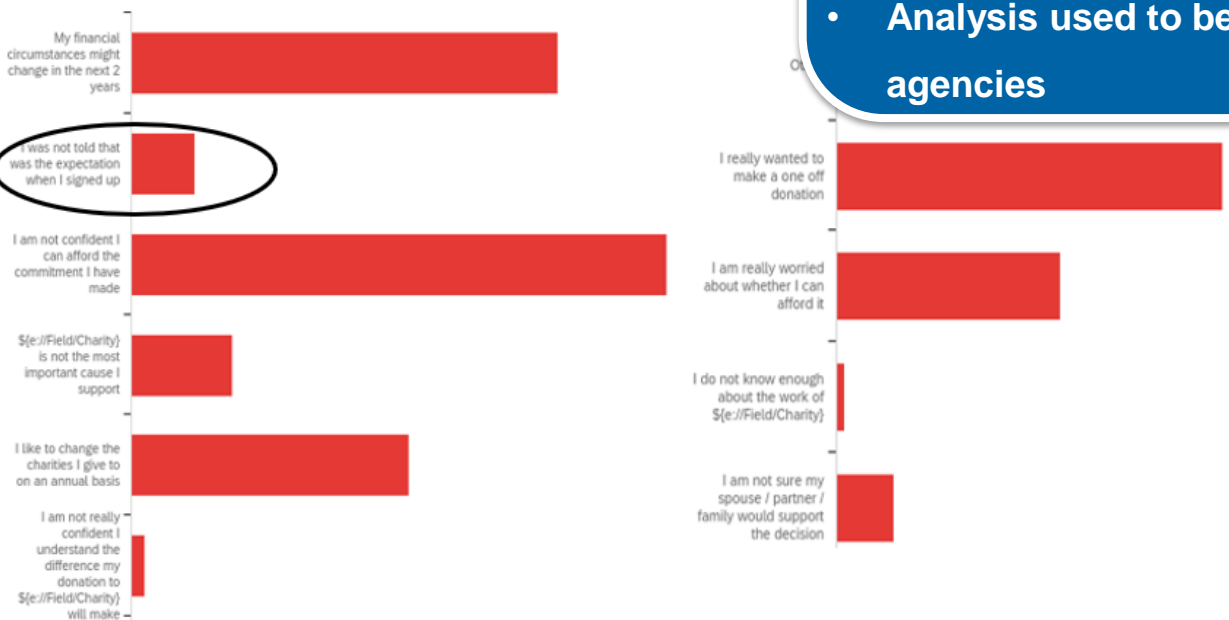


How would you rate your experience in signing up to CPA' Big Family with our fundraiser, Travis?



- Experience scores, commitment levels and supporter comments provide invaluable mystery shopping
- Data helps to fill an 'invisible hole' long before attrition reports
- Analysis used to benchmark across agencies

Why will you not be giving to CPA in 2 years?



MSX supports tailored fundraiser training



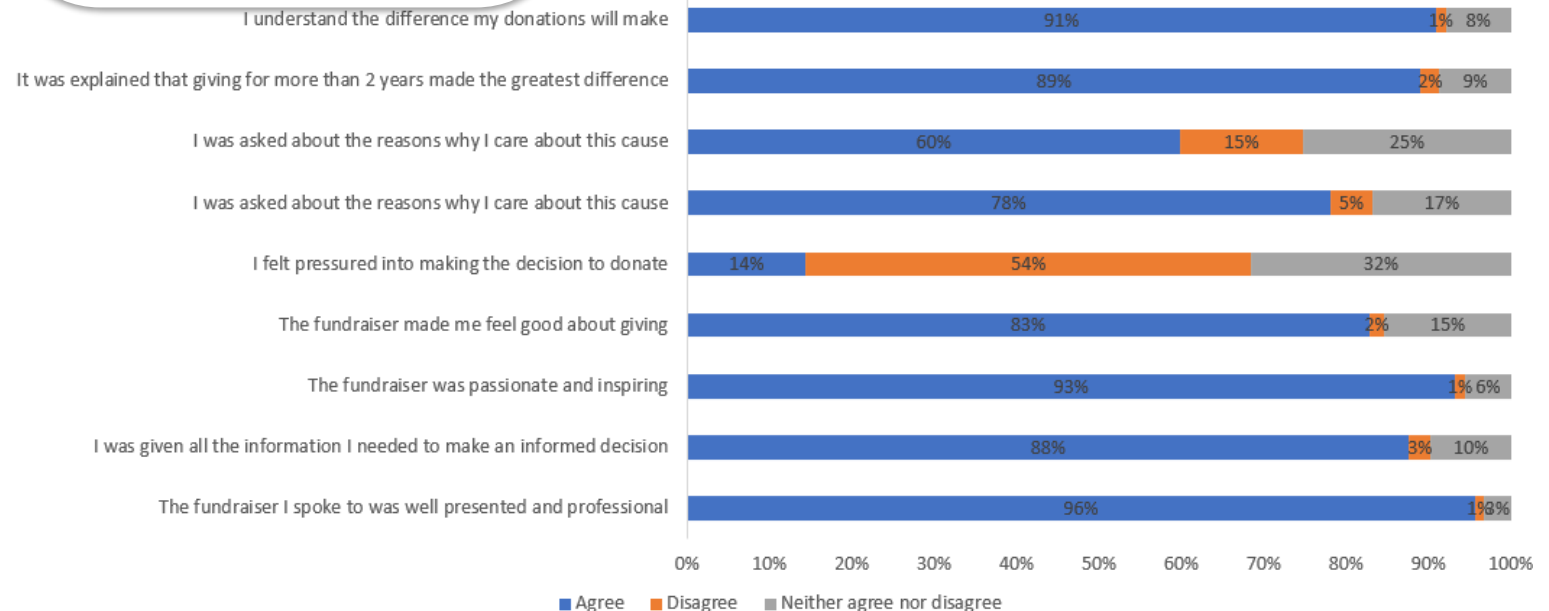
- Use fast data to better support, train, engage and celebrate fundraisers
- Purposely don't incentivise fundraisers to increase survey response rate

Positive comment given to fundraiser first-thing next day

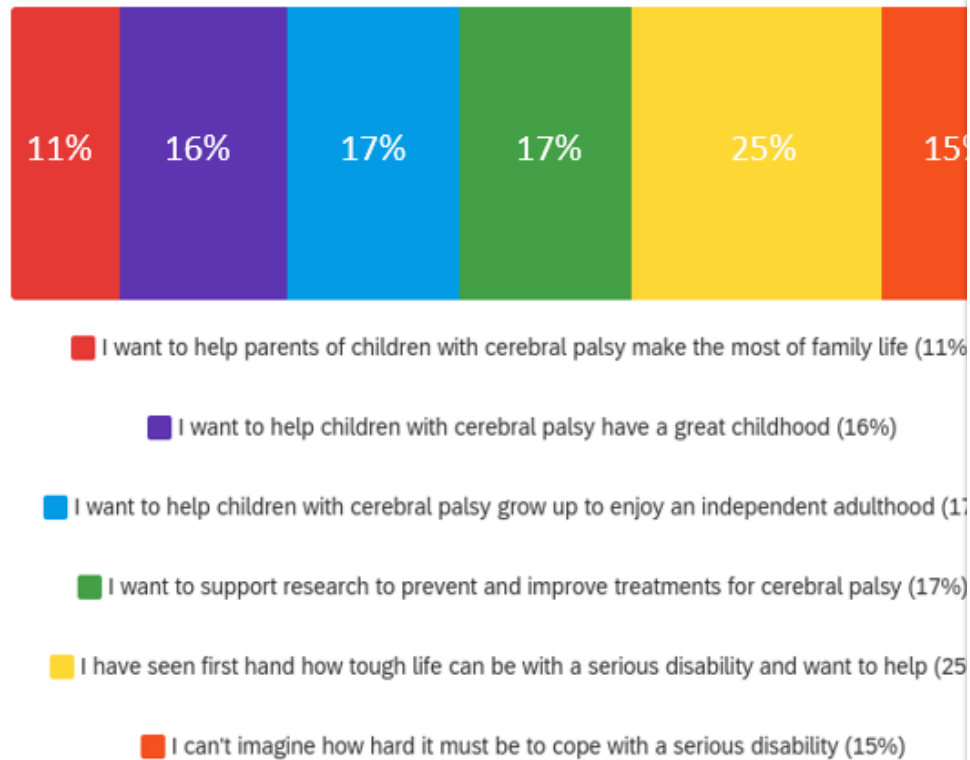
"The young man was absolutely amazing he was super friendly, easy-going and passionate about the cause and what it means. We spoke for a good 30 minutes and he was honestly the most amazing person that's ever approached in regards to helping a cause. If I could give him a 100/10 I would. Amazing person."

Terrible fundraiser feedback prompts immediate re-training

"He was quite pushy about it and when I said that I will go home and think about it and will ring up, his response was then he won't get any recognition for it. I have already sent an email asking to remove me from what I signed yesterday"



MSX supports enhanced RG engagement



- Create dialogue with RGs so they feel heard and understood
- Sets tone for future engagement and paves way for 2-way dialogue
- Start to sprinkle surprise and delight moments
- Opportunity to use motivational data for tailored donor journey and key pivotal moments eg upgrade

Opportunity to reach out and provide more information of supporter impact and deepen their commitment

What % of the money donated actually goes towards Cerebral Palsy individuals?

Start a conversation with RG and thank for such in-depth feedback

"I did feel some pressure to say yes, I normally try very hard to avoid eye contact or talking to people selling or promoting products and services in malls or on the street. CP is a condition I've had a lot of experience with and the fundraiser was very passionate."

Start a conversation with RG so they feel heard

"Sales pitches tend to be too pushy. I want to feel like I have donated for my own reasons rather than for someone else's. I have a child with CP, happy to donate, but feel that the sell is always too strong. This is not a statement about one person in particular, but the donation scene as a whole, across organisation."

Chance to let RG know issue is resolved – not expecting human at the other end

"Sorry I hit the unsubscribe by mistake! Please reinstate"

Integration of MSX into Telemarketing

CPA wanted to apply the same learnings from F2F to our telemarketing campaigns

- Quarterly calling for reactivations and upgrades
- Monthly Declines

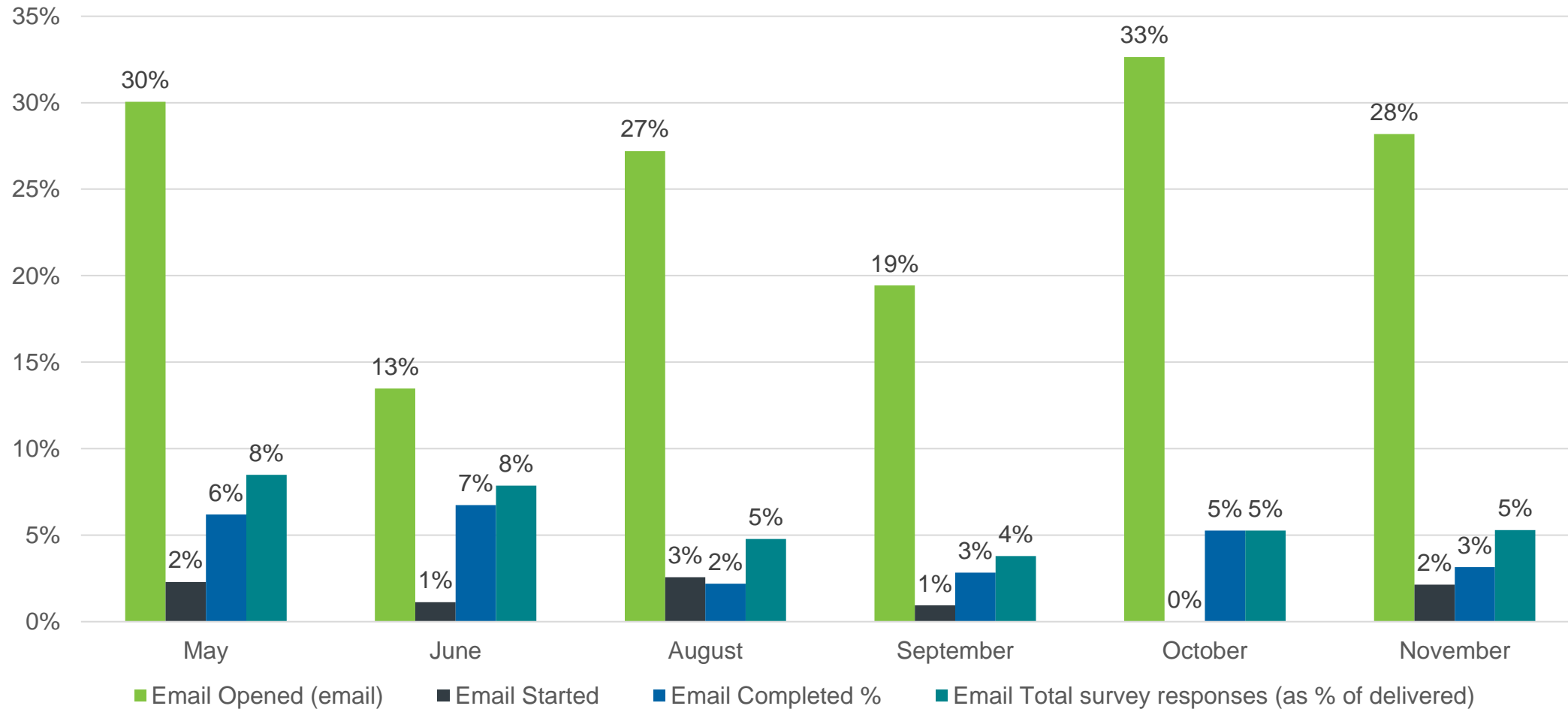
Campaign based calling:

- Bequests
- 2 Step
- Event to RG
- Primed Campaigns
- Raffles

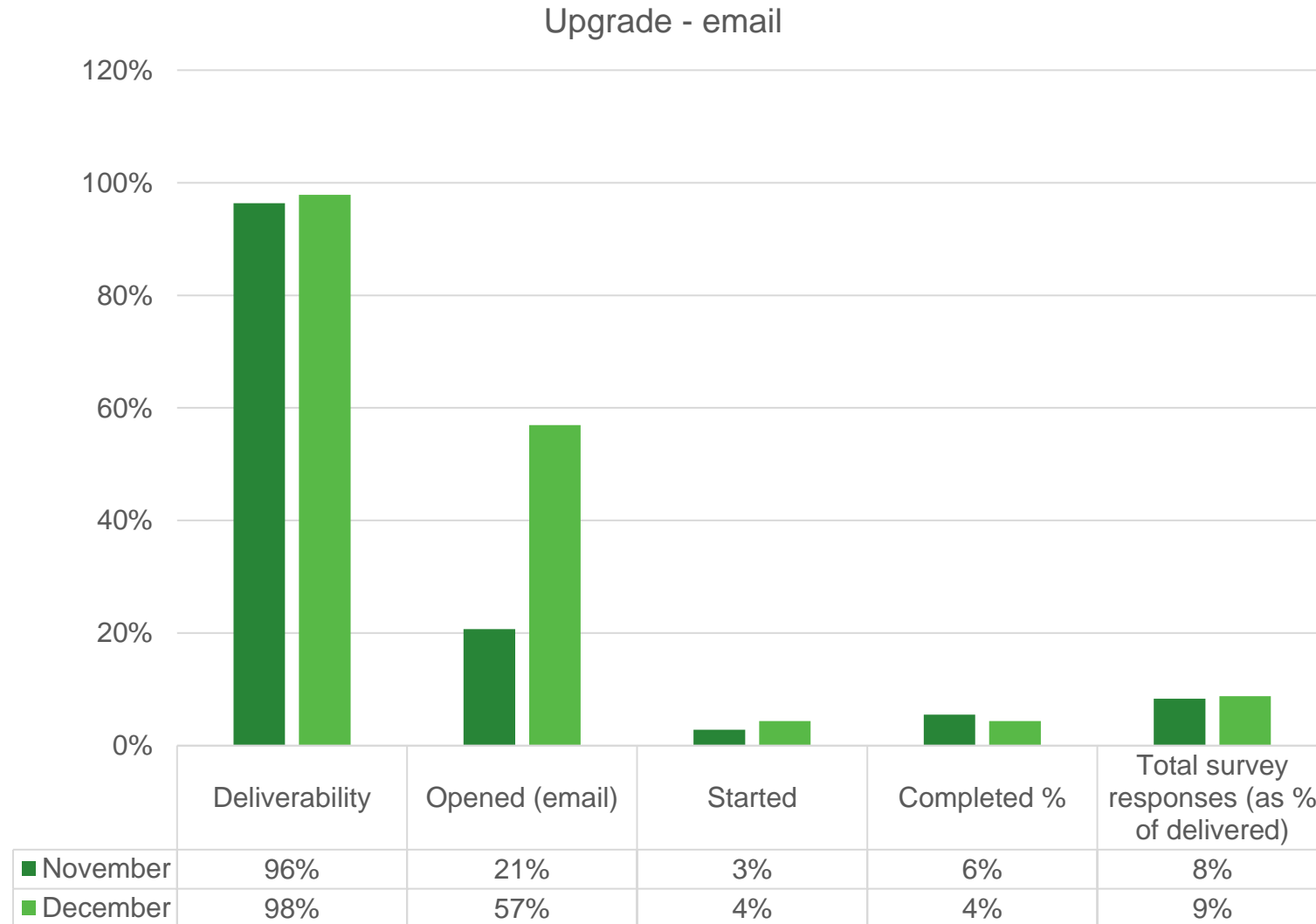


Results from Telemarketing Reactivations

Month by Month - reactivation - email



Results from Telemarketing Upgrades



Feedback from Donors

“Thanks for listening, not many organisations do” – Tom, Sydney

“I will tell your organisation if and when I want to donate more. Be happy with my donation” – Andrew, Toowoomba

“Please pass on my apology to the young man who called me. I was having a bad day. – Robyn, Nowra



Feedback from Donors

“I couldn’t get a word in with the guy on the phone, do better.’ Peter, ACT

“Thanks for the call, I couldn’t give any extra but your team made me feel very special and updated me on what my donation is doing.” Chris, Cairns

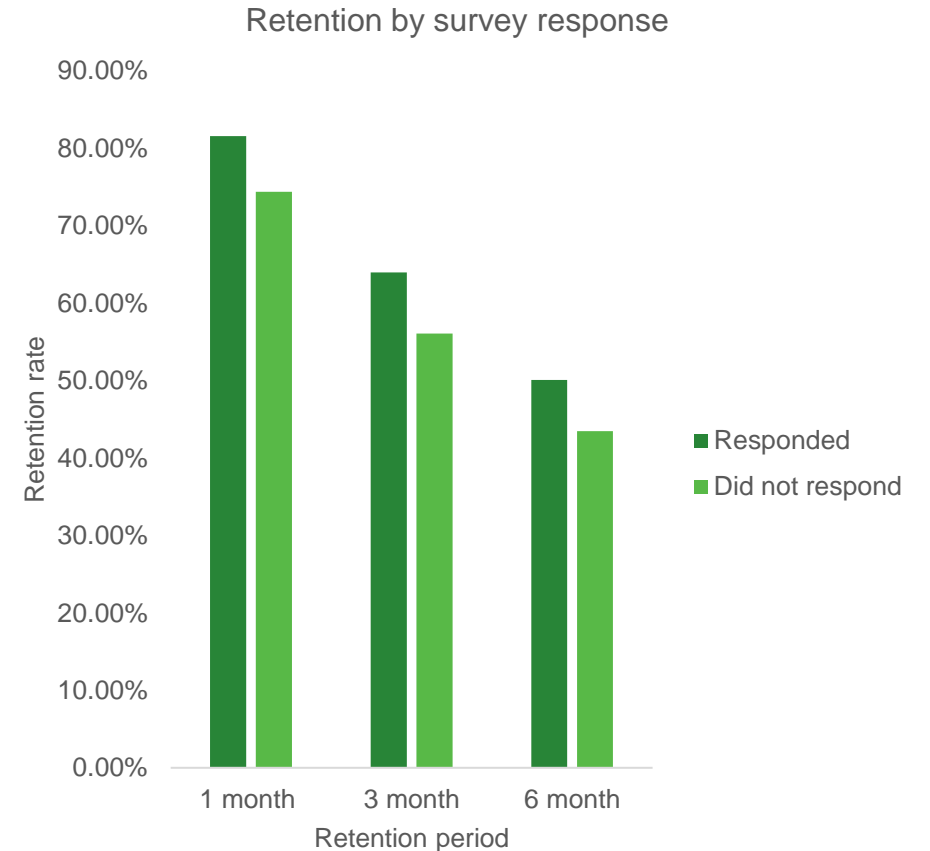
“I explained the young lady on the phone that I can’t commit monthly but I’ve had a think and would like to make a \$500 donation. Please call me. Keep up the good work” Mary, Albany



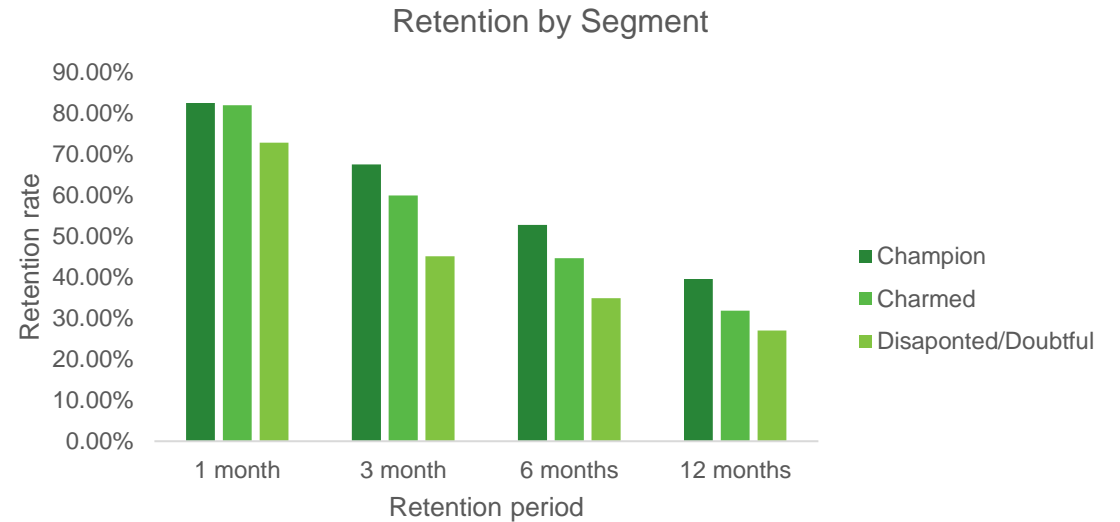
Key results and learnings

Two years after the trial began More Strategic ran analysis that demonstrated;

- **Sending the survey has no correlation with retention**
- **Respondents have significantly better retention than non respondents**



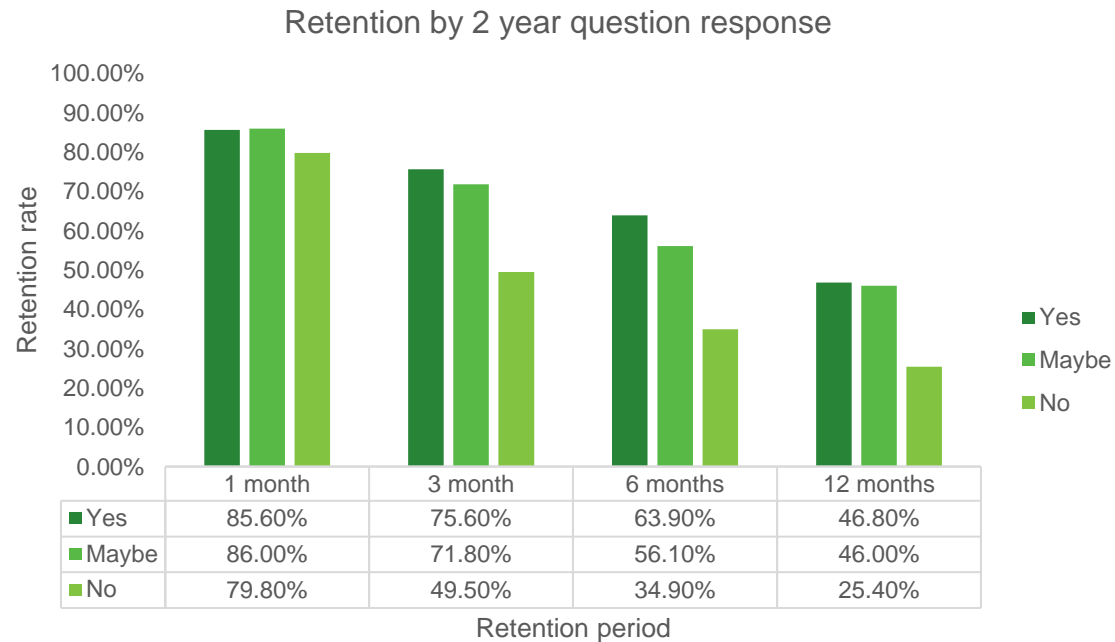
CHAMPIONS have the best retention



This was measured by matching survey respondents to charity CRMs and analysing the status of people in each of the 4 segments

The best indicator of quality

'Do you still intend to be giving in 2 year's time?'



Opportunity – increase F2F survey response rate

Lodgment time/ing

Channel

Subject line

Incentivisation

Language nudges eg:

- Personalisation
- Urgency/deadline
- Anchoring
- Norming
- Social compliance
- Social altruism

Need to keep testing and optimising

Felicity, this is your chance to have your say!



Jodie Mills
To Felicity Reid

From: Jodie at Cerebral Palsy Alliance <CPA@qemailserver.com>

Sent: Monday, 23 October 2023 7:01 PM

To: Felicity Reid <felicitygiles@hotmail.com>

Subject: Felicity, this is your chance to have your say!



Hi Felicity

Thanks so much for speaking with John today and joining an amazing group of people committed to redefining the future of disability.

Felicity, can I please ask you to do one more thing to help people with cerebral palsy?

Can you spare 2 minutes to join the other 13,000 people who have helped to control our costs by taking this super short survey now?

How would you rate your experience in signing up with with John today?

Very poor



I want to know about your experience so I can make sure we deliver the most engaging conversations for other committed and generous people like you tomorrow.

Jodie Mills

Opportunity – survey people that say ‘no’ to F2F fundraisers



Protect brand

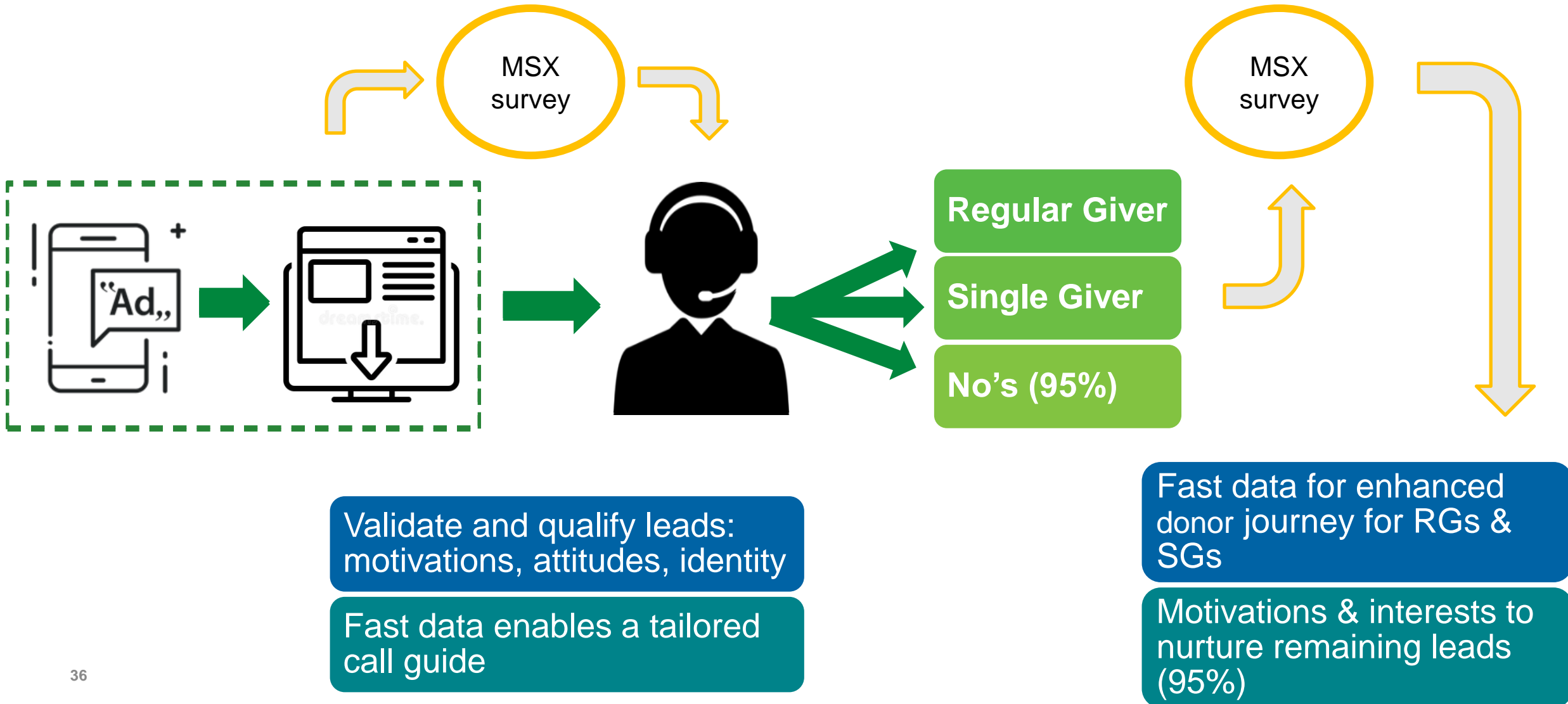
Opportunity to say ‘YES’ later

Opportunity to become a fundraising lead eg:

- Single gift in their own time
- Lottery lead
- STEPtember participant
- User experience

Fundraiser mystery shopping

Opportunity – Fast data in 2Step campaigns



Opportunity – using RG motivations and identities to improve supporter centric, tailored journeys and campaign selections

MOTIVATIONS

I am most interested in providing *care* to people with cerebral palsy

vs

I am most interested in finding a *cure* for cerebral palsy

I most want to help people with *cerebral palsy*

vs

I want to help anyone with a *disability*

I have *personally known* someone with a disability

vs

I have *never known* anyone with a disability

=

Tailored journeys that speak to and support RGs motivations

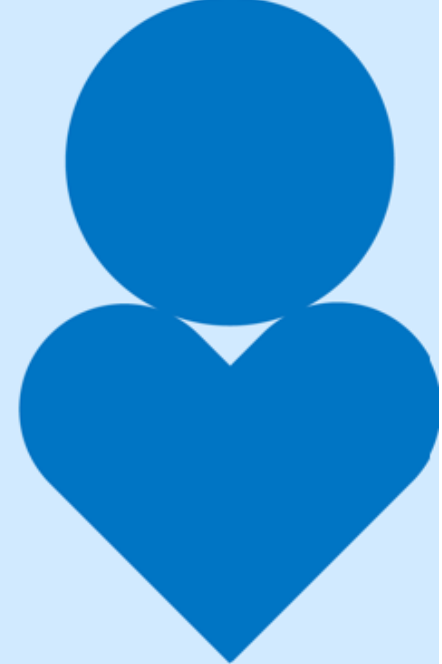
IDENTITY

+

Caring
Compassionate
Hopeful
Helpful
Encouraging
Friendly
Other

Throughout donor journey
eg selections and scripts for upgrade and reactivation

**FIA
Conference**
2024



Thank you



Individual Giving Track
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