

Transforming Fundraising through Data: Our Journey

INDIVIDUAL GIVING TRACK

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Erin Hamalainen | The Fred Hollows Foundation



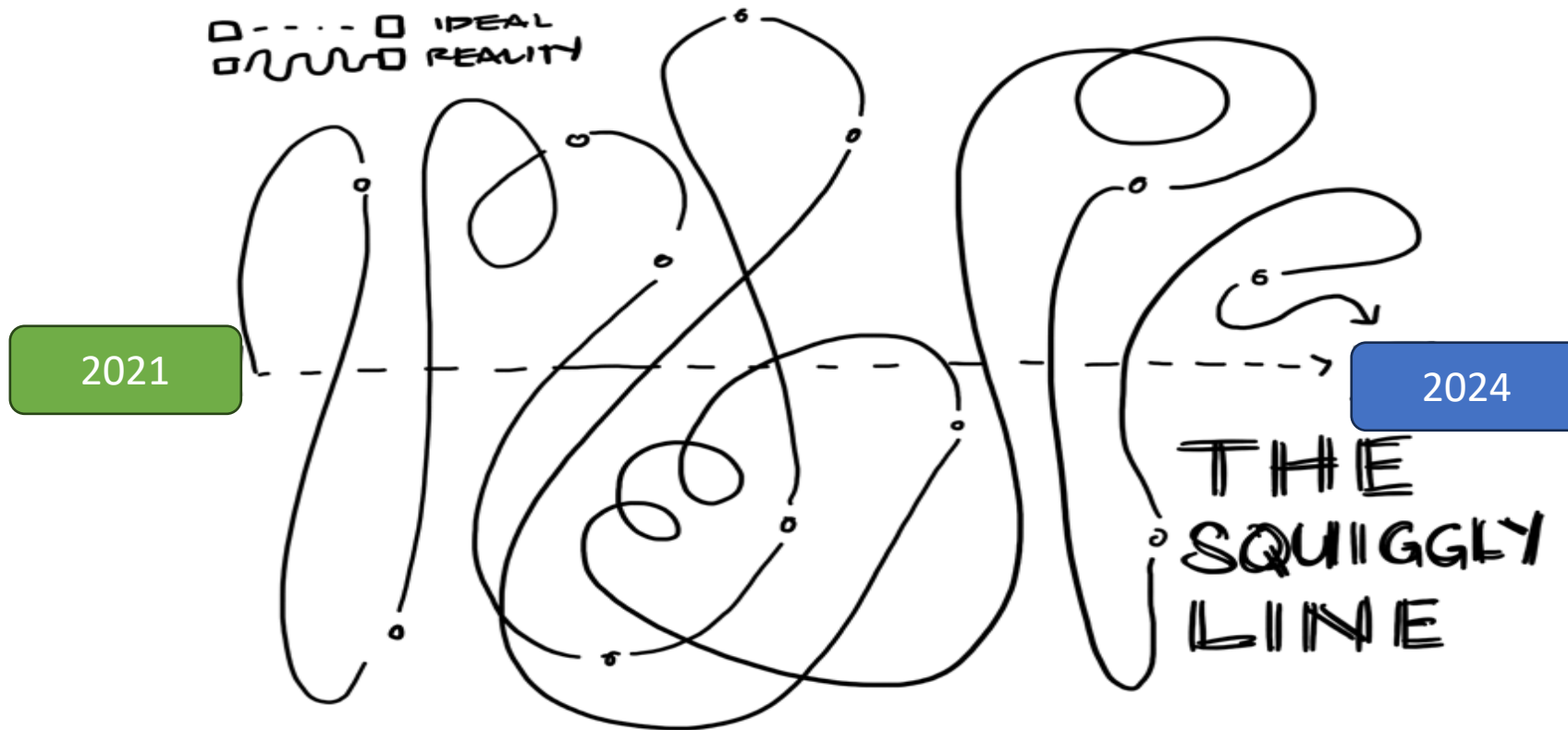
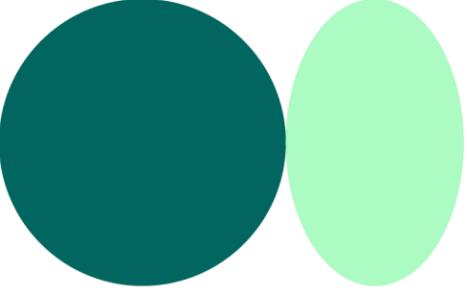
Individual Giving Track
Sponsored By:

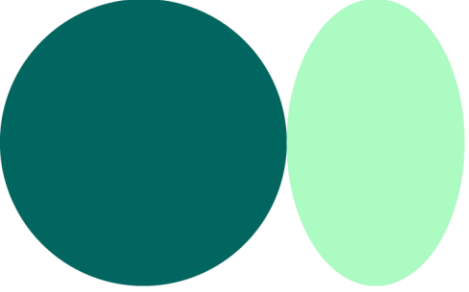
RobeJohn

The Fred Hollows Foundation acknowledges the
Traditional Owners and custodians of the lands on which we work and
recognise their continuing connection to land, waters and community.

**We pay our respects to them and their cultures;
and to Elders both past and present.**



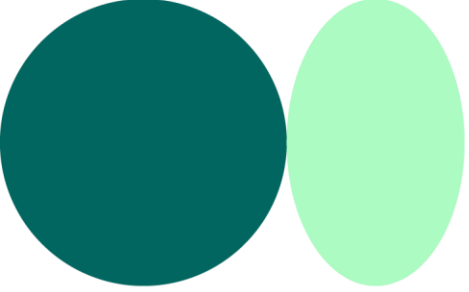




McKinsey research tells us that

70%

**of organisations fail digital
transformation projects**



How many of you have seen or been involved in a failed technology implementation?



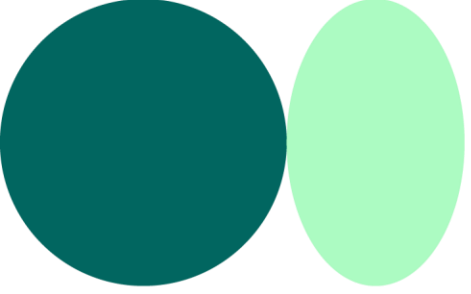
2004

**YOU DO DIGITAL
TRANSFORMATION!**

**YOU DO DIGITAL
TRANSFORMATION!**

**YOU DO DIGITAL
TRANSFORMATION!**

**EVERYONE DOES DIGITAL
TRANSFORMATION!!!!**



Session Overview

 Getting Started

 People

 Technology

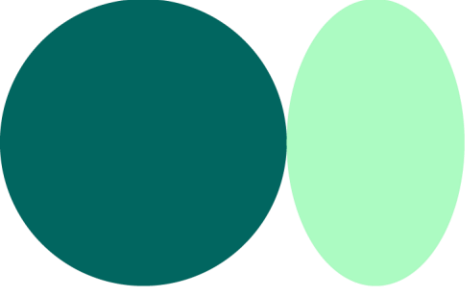
 Measuring Success

 Data

 What's Next

 Strategy

 Key Takeaways



Getting Started

In 2021 we asked:

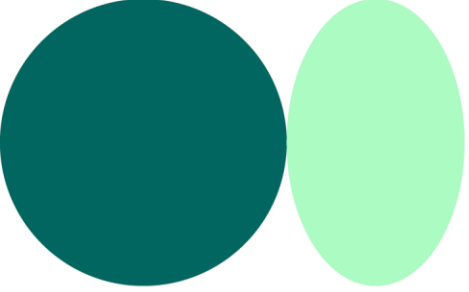
"How can we create better digital reporting"

"Do you want better reporting, or do you want to action your insights better"

Discovery Workshop

- All levels of staff involved
- Discussed analytics, data, technology, governance, media and campaigns
- 5-year outlook
- Pain points and problem areas
- Aspirations and blue-sky thinking

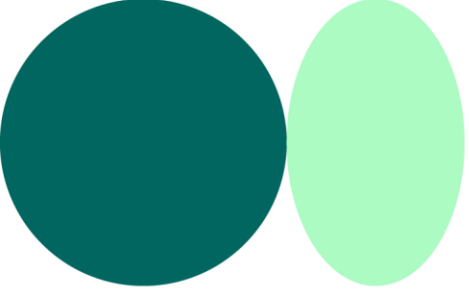
Enabled us to understand the business problem and what we needed to do to resolve it.



Getting Started

Problem Statement

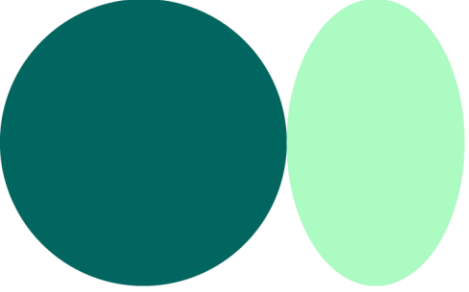
"The **systems** in place to segment, track, and attribute donations to marketing spend are **strong for offline but not cross-channel**. The donor comms and organisational marketing approaches are currently **channel-centric not "donor-centric"** and there are **gaps in attribution and efficiencies**. The Fred Hollows Foundation is looking for clarity on **where and how to invest** to get returns and react to **emerging and future market changes**."



Getting Started

Problem statement

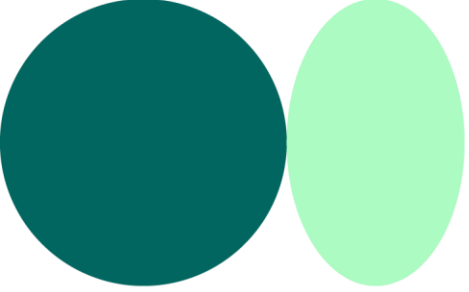
- Adoption of GA4
- Google Cookies effects on digital advertising
- Online / Offline synchronised marketing activity
- System integrations & limitations
- Declines in traditional acquisition channels



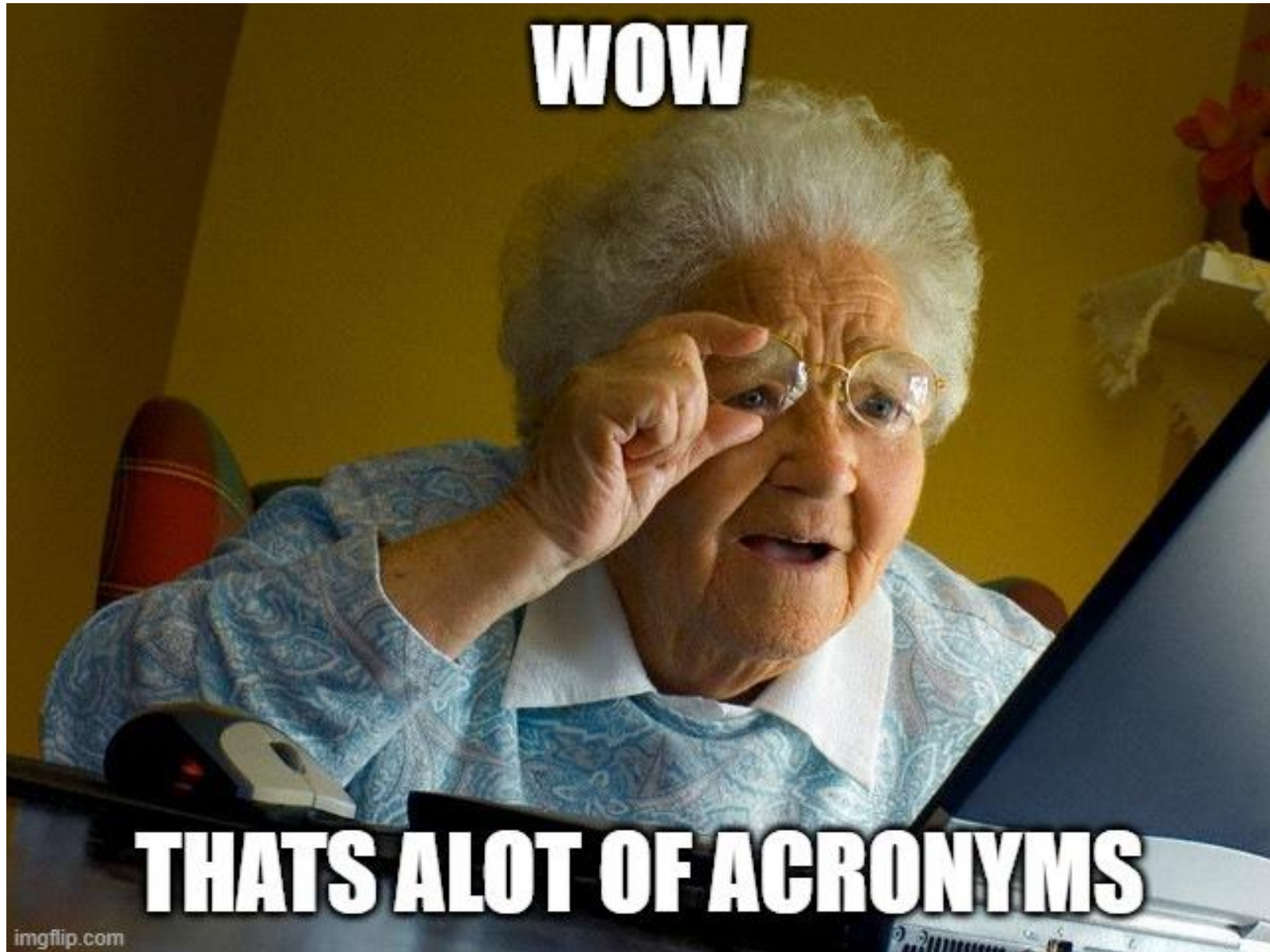
▶ Getting Started

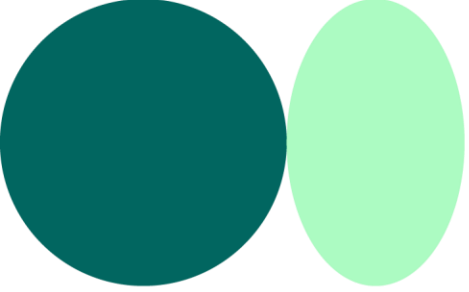
Multi-Year Roadmap: **The Focus**





 Technology





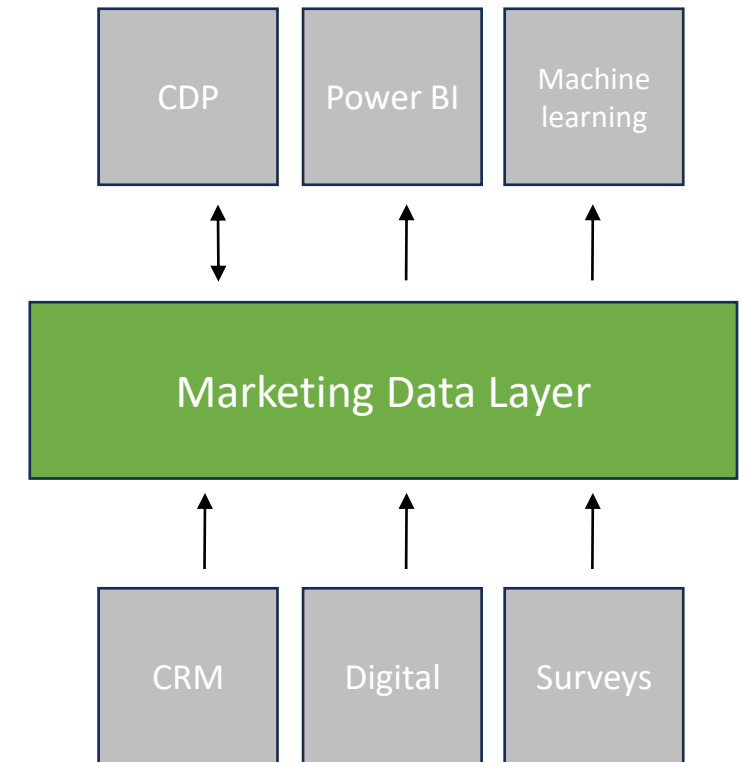
Technology

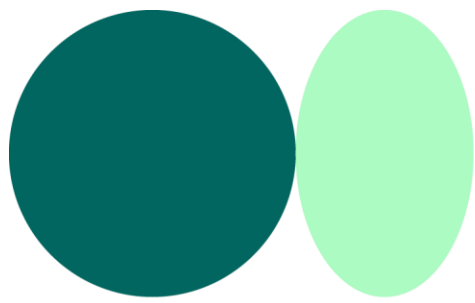
Marketing Data Layer (MDL)

- Centralised, cloud-based data storage
- Foundation of making our data accessible for reporting, orchestrating and predictive modelling

Examples: Azure / AWS / Google Cloud Platform

- 6 months completion
- Mostly external and IT Support with some analytical guidance
- Some delays with data sources
- By outsourcing we didn't have internal knowledge for ongoing support





Technology

Customer Data Platform (CDP)

- Collects, harmonizes and activates customer data from various channels, systems or data streams (CoPilot).
- Enables personalisation for the donor, orchestrates donor journeys in "real time" and provides insights

Examples: Tealium, Blueconic, Segment

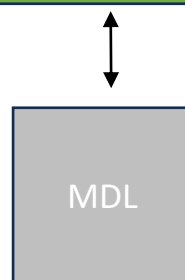
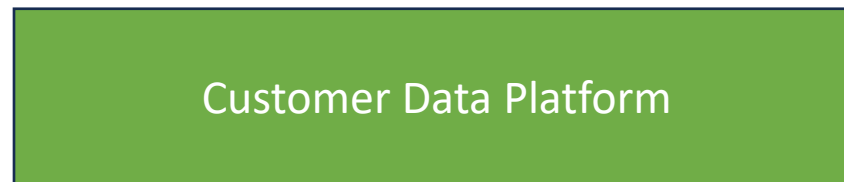
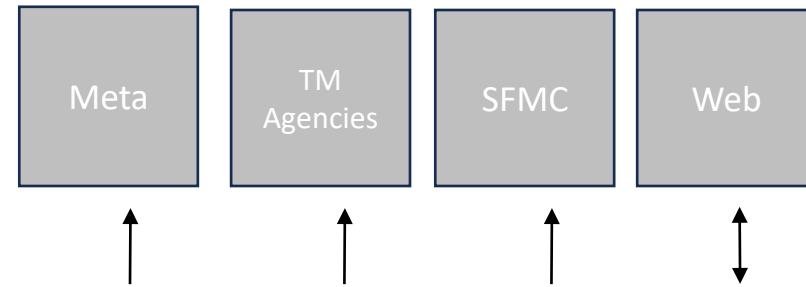


Technology

Scope
Requirements

Vendor &
implementation
partner RFP

Implementation

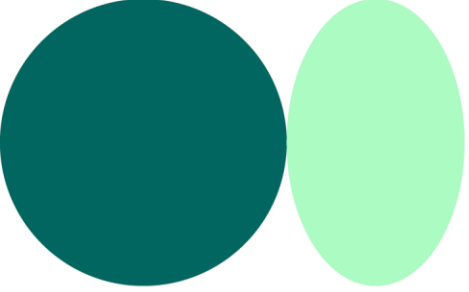


Customer Data Platform (CDP)

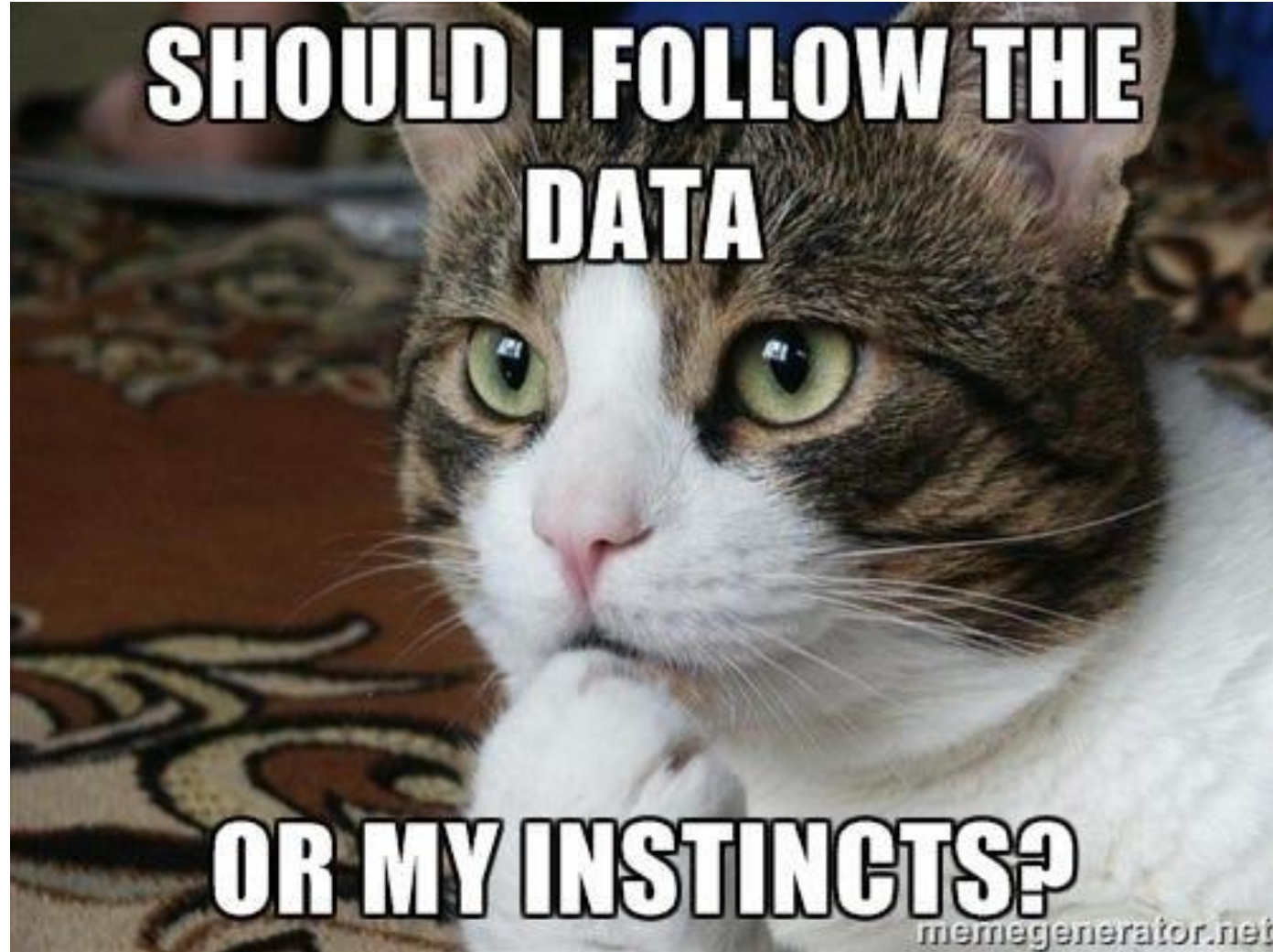
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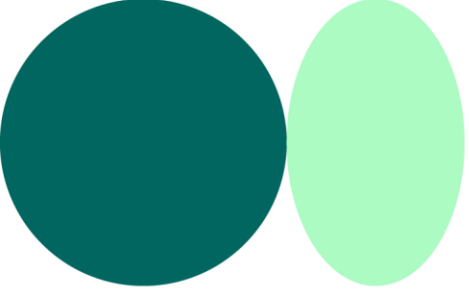
Examples: Tealium, Blueconic, Segment

- Longer than expected implementation
- Offshore partner with onshore presence
- Use Case focused strategy
- Underestimated the complexity and resources required



 **Data**





Data

Analysis

Supporter View

1. How your supporters engage versus our charity benchmarks
2. How you are performing on your net promoter score (overtime tracking improvements experience design)
3. Understand the key drivers of conversion and
4. Receive insights into your supporter's motivations and attitudes to customise future journeys.

Profile of Supporters

Contactability

Lifetime Giving History

Gift Types (% and Counts)

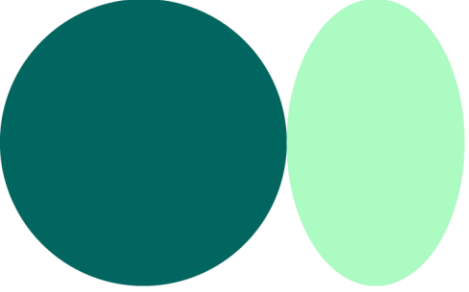
Engagement and Experience Data

Conversion Odds

LTV Drivers

FIA

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Data

Understanding Audiences



NORMA
ACTIVE CASH DONOR

*Thanks for the work you do...
it makes a real difference to
people who often have no hope.*

DEMOGRAPHICS

Age: 65 Years of Age
Job: Semi Retired
Family: Children left home
Finances: Homeowner

MOTIVATIONS

Give to charity as that is the right thing to do. Also resonate that giving is God's work. Passionate about children's health.

CONNECTION

Vision issues are prominent in age demographic and has impacted close friends.

MEMORABLE EXPERIENCE

Reading stories of beneficiaries

OPPORTUNITY

Be educated on the full breadth of work that The Fred Hollow's Foundation does.

CHARITY ENGAGEMENT

Giving to The Fred Hollow's foundation for a long time. Feel connected to Fred and love that Gabi is still involved.

CAUSE ENGAGEMENT

Believes in the work that Fred. Don't understand the full breadth of work that The Fred Hollow's Foundation does.

EXPERIENCE

Make cash donations at key times during the year (Xmas and Tax) via mail.

COMMUNICATIONS

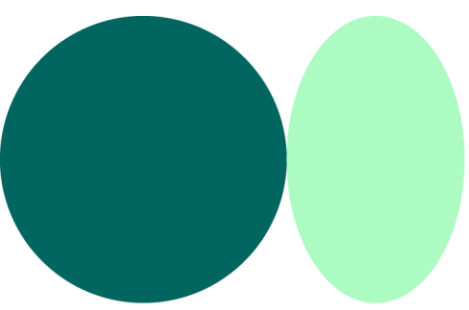
Recently started to read and engage more with emails.

PAIN POINTS

Give to multiple charities and can sometimes feel bombarded with communications.



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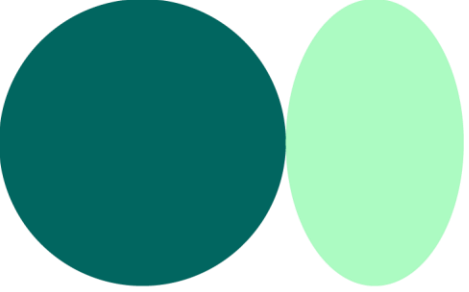


Data

Maximising LifeTime Value

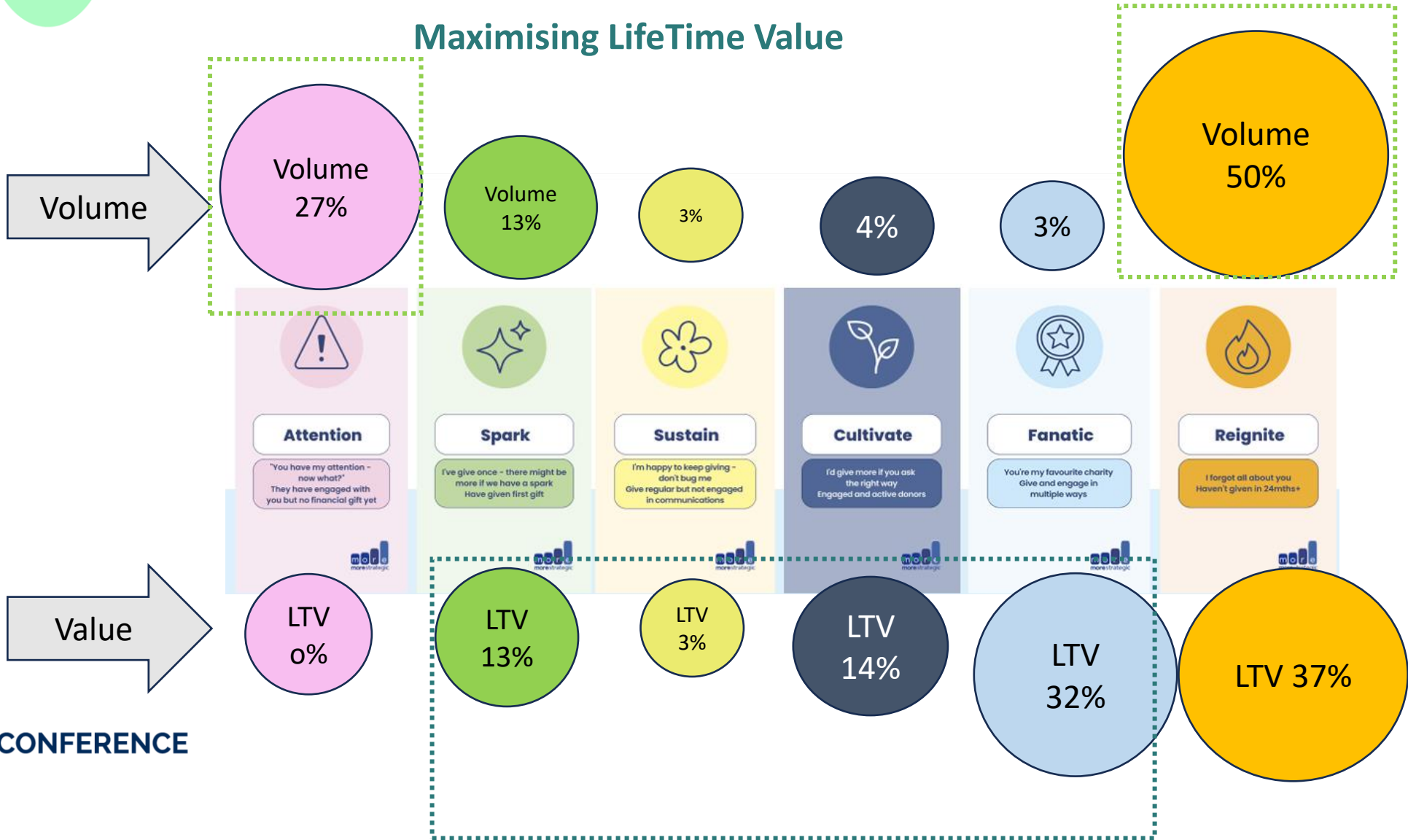


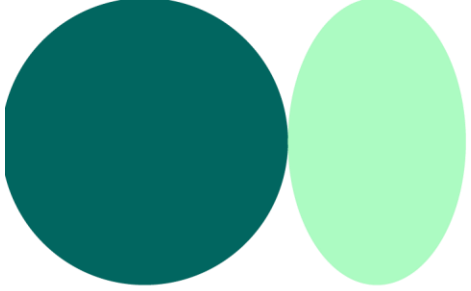
Supporter Engagement Stages



Data

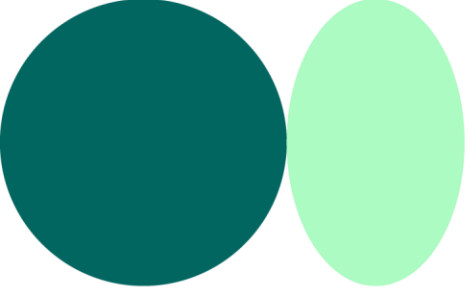
Maximising LifeTime Value





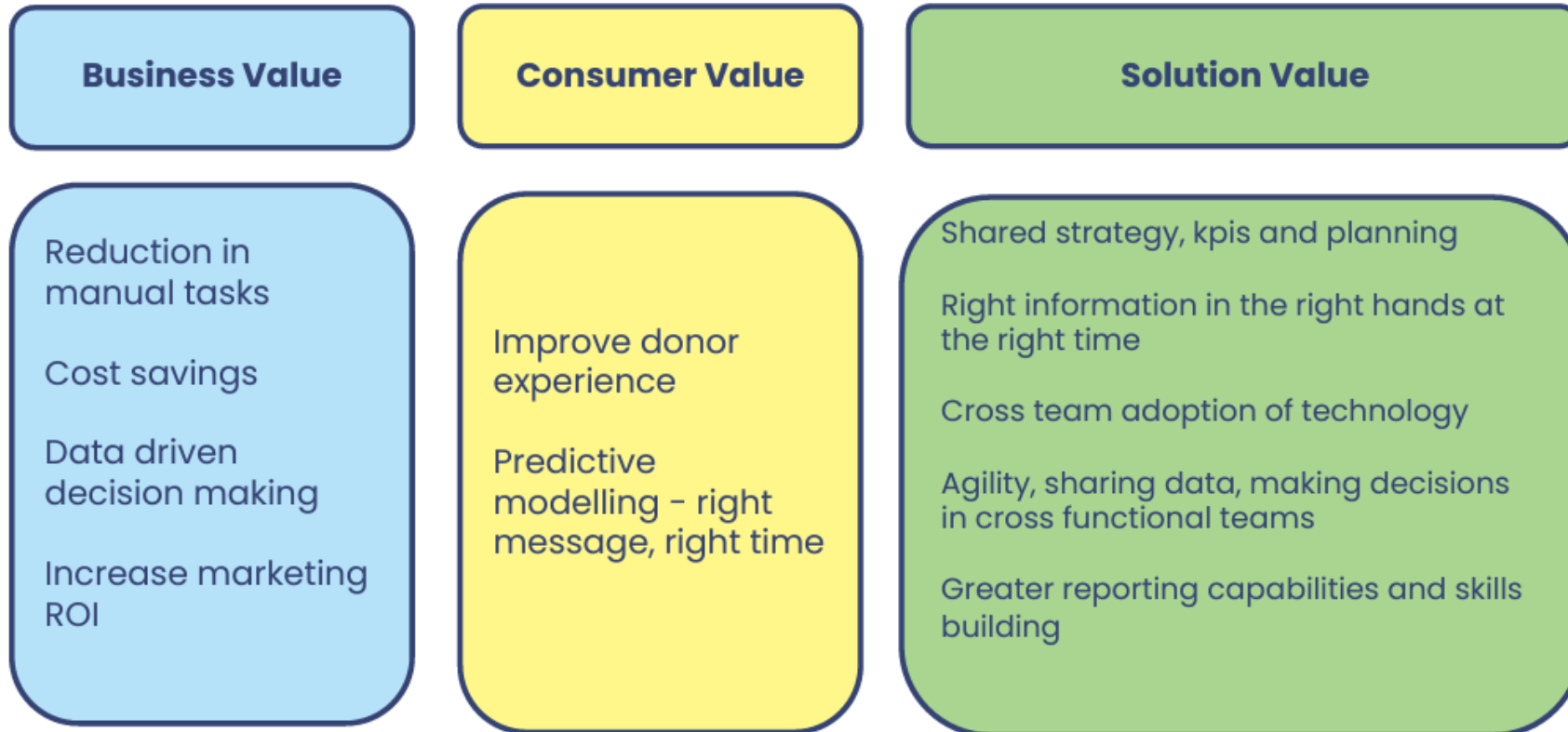
Strategy





Strategy

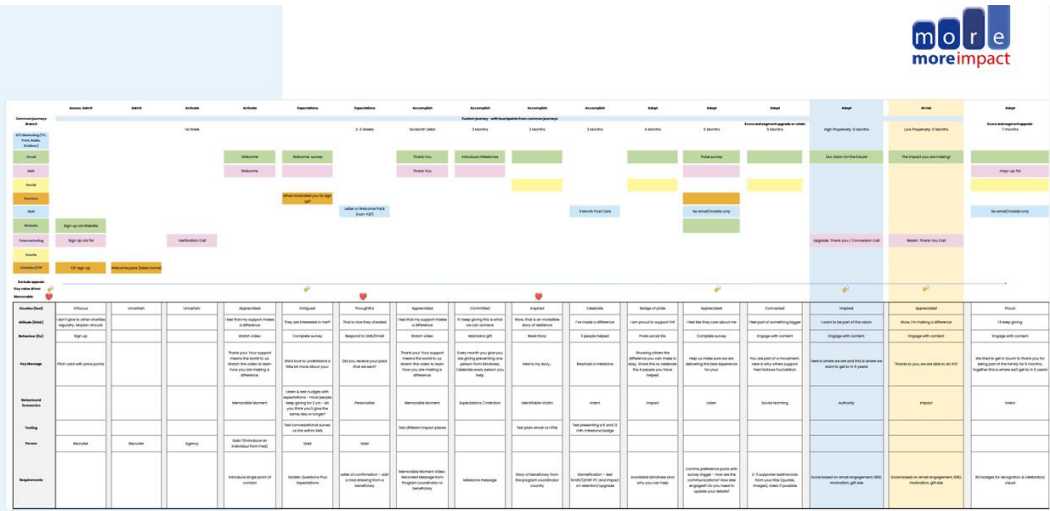
Donor Strategy – Objectives



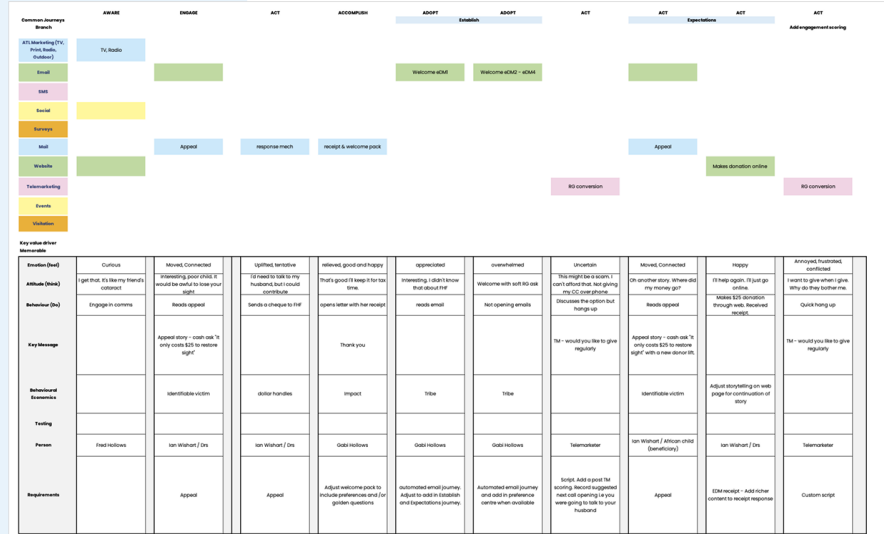
Strategy

Donor Strategy – Journey Designs

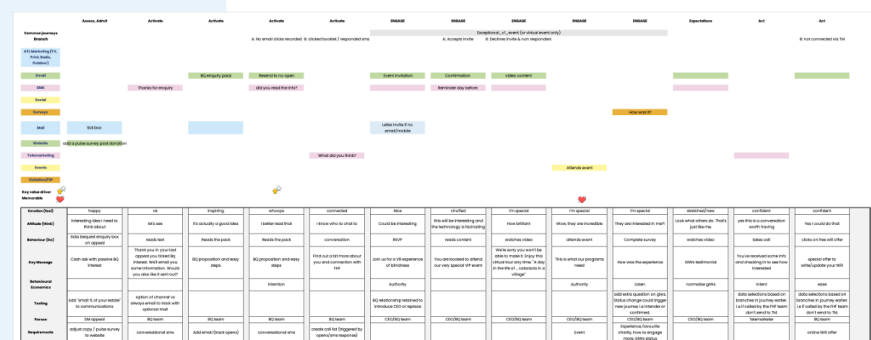
RG Journey

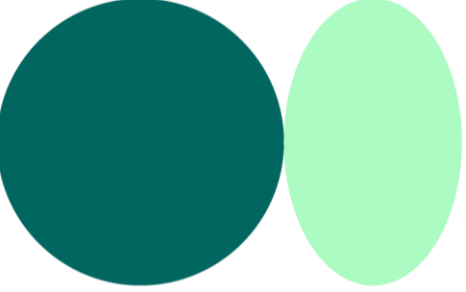


Cash Journey



GIWs Journey



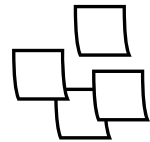


Strategy

CDP Use Case Development



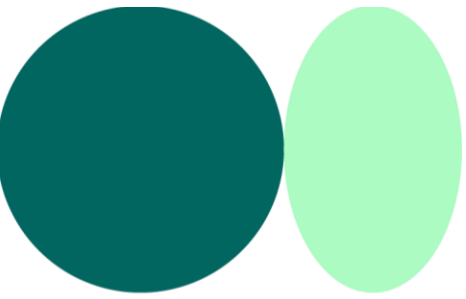
Ideas for Use Cases - KPIs and donor strategy



Prioritisation based on value – income, learnings, quick wins

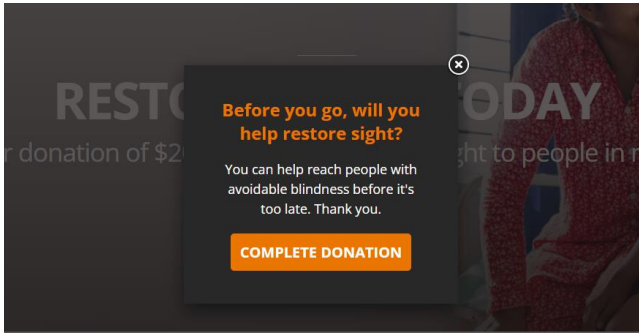


Scoped out the ideas – data, connections, timing, audience, creative/
personalisation



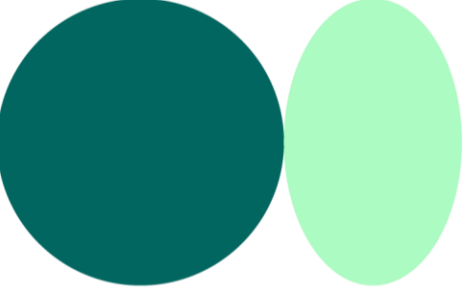
Strategy – in action

CDP Use Cases in market



Cart Abandonment Lightbox & Email

Goal	Target Audience	Channels	KPI's
Increase online conversion rate / conversion of the target donors by displaying the exit intent to complete their donation.	Desktop visitors to any donation pages that display intent to exit the page/ close their browser, and visitors who do not click on anything for more than 5 minutes.	CMS Web personalisation (Lightbox)	2- 4% conversion rate (Industry Standard)



Strategy – in action

CDP Use Cases in market



Gifts in Will Pipeline



Regular Giving Conversion



Second Cash Gift

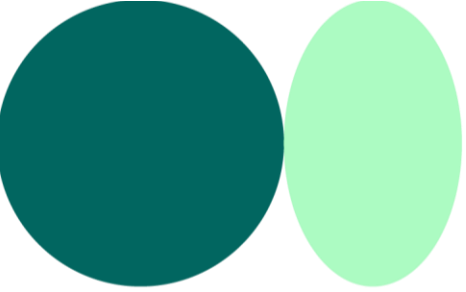


gatheredhere
FREEWILLS

Free Will writing offer

Create your own legacy of restoring sight to people living with avoidable blindness in only 10 minutes. **Write your legally binding Will for free with our partner Gathered Here**, an online Will writing platform that makes writing your Will simple and easy, with free unlimited updates for life.

[Write my Will for free](#)



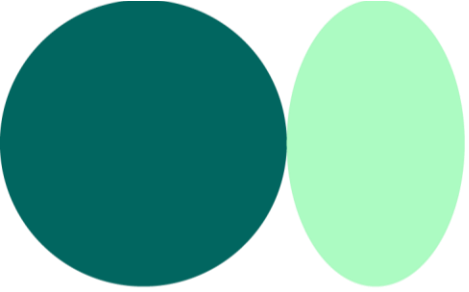
Strategy – in action

CDP Use Cases in market



Regular Giving Conversion

Goal	Target Audience	Channels	KPI's
<ul style="list-style-type: none">•Convert single giving donors to regular donors•Journey begins 4 weeks after donor makes a one-off donation.	<ul style="list-style-type: none">•New single givers who give \$20-\$499• Warm single givers who give \$20-\$499 and have made less than 5 one-off donations (ever)	<ul style="list-style-type: none">•Email•Telemarketing•Digital advertising•Web personalisation (Blue Conic dialogues)	<ul style="list-style-type: none">• Increase conversion to RG by 5%

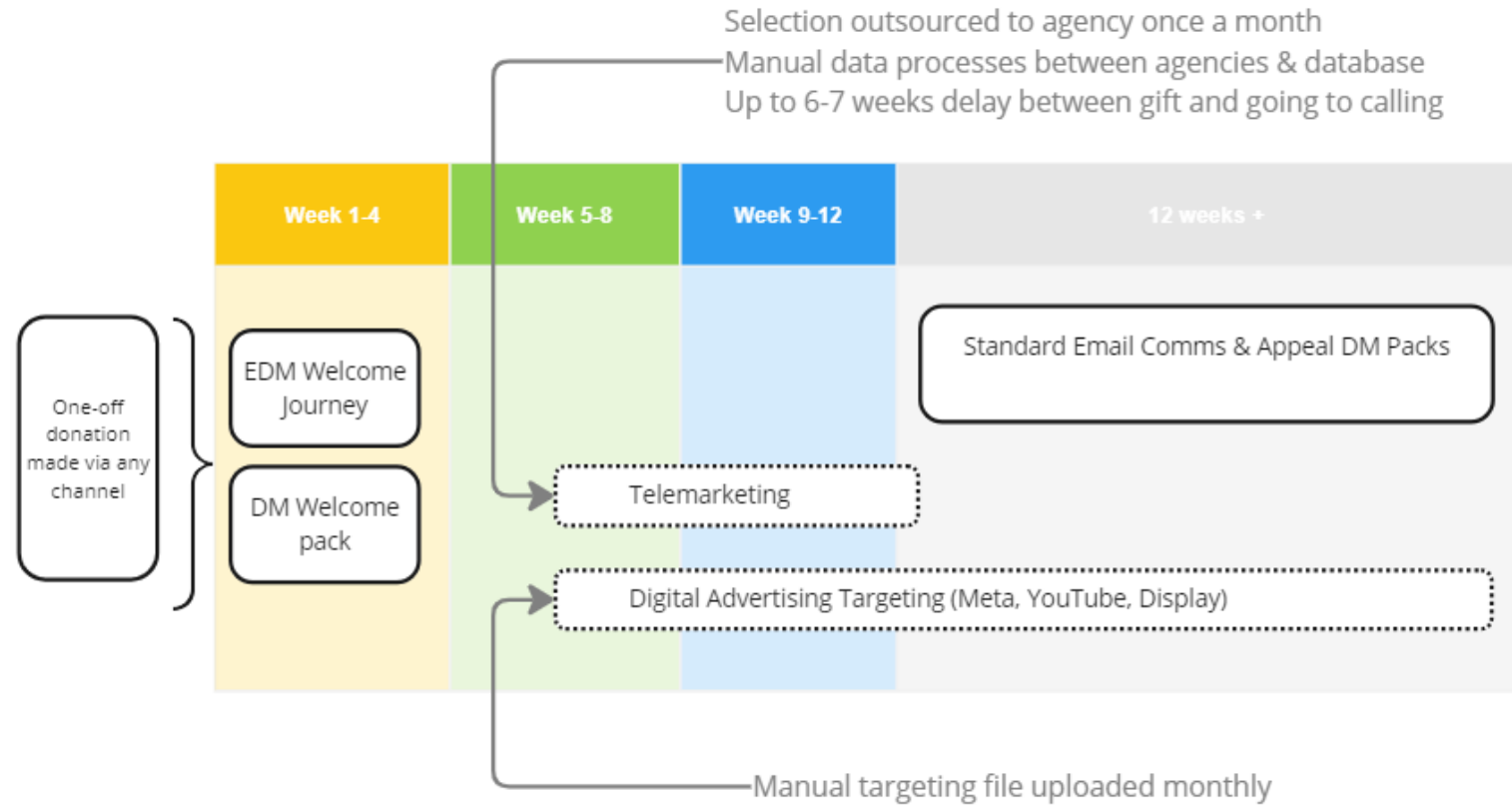


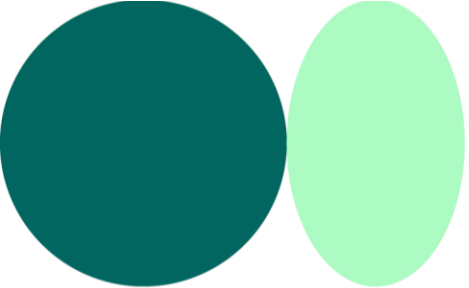
Strategy – in action

CDP Use Cases in market



Regular Giving Conversion

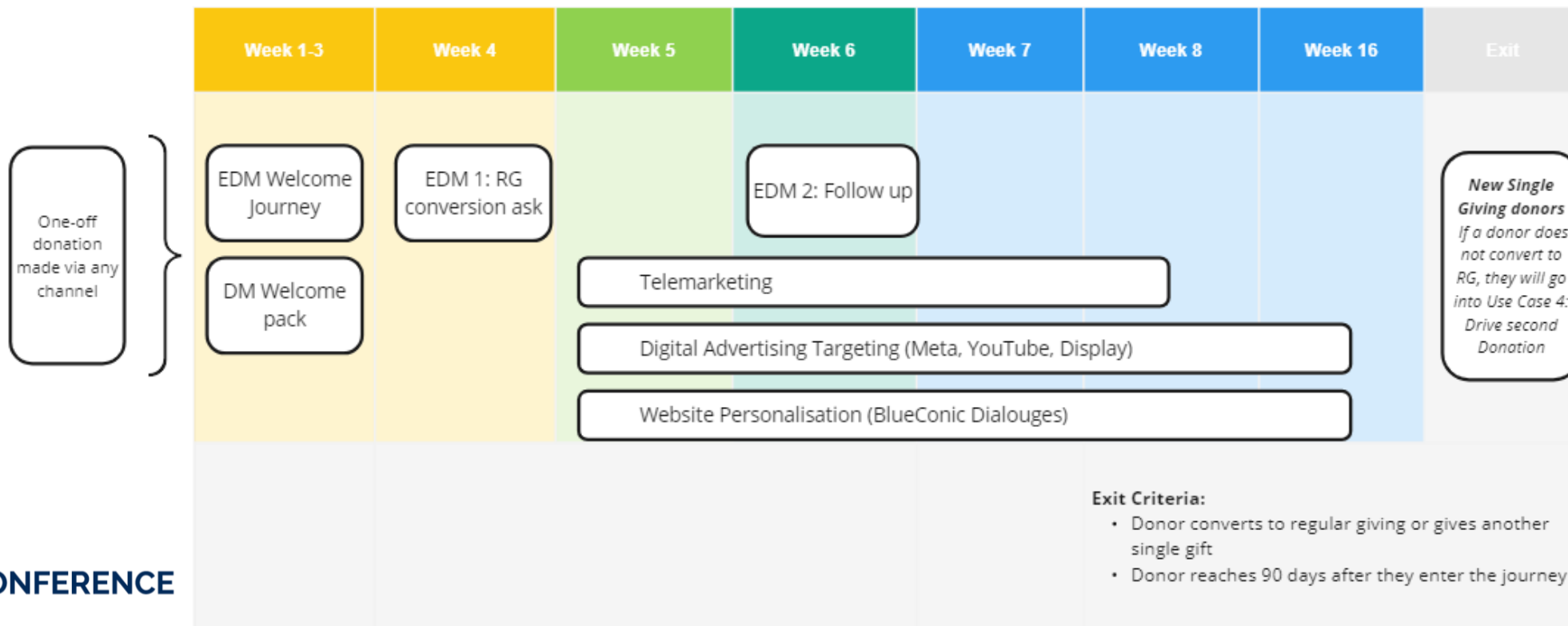


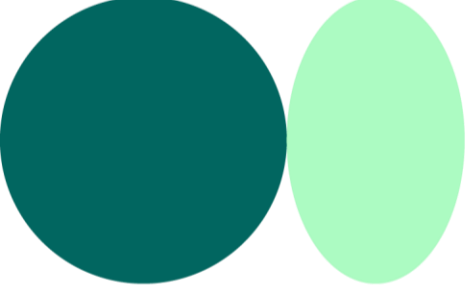


Strategy – in action



CDP Use Cases in market Regular Giving Conversion






Strategy – in action

CDP Use Cases in market



Regular Giving Conversion

The Fred Hollows Foundation **DONATE**



Dear Camila,

I wanted to thank you for recently making a remarkable impact on the lives of those suffering from avoidable blindness. Your kind gift of \$0.00 is already hard at work, helping to restore sight and transforming lives around the world.

Today, I'm thrilled to share an exciting opportunity that can amplify your impact even further. A generous group of The Foundation's supporters have agreed to [match new monthly donations for 12 months!](#)

Put simply, **every dollar you contribute monthly will be matched**, instantly doubling the number of people whose sight you will restore! That's double the number of children, mothers, fathers and grandparents who will have their lives transformed in ways we can't even begin to measure.

Camila, this offer is limited to the first 200 donors who sign up, so act quickly to ensure you don't miss out.

YES, I WANT TO DOUBLE MY IMPACT

Our monthly donors, known as Visionaries, are the heartbeat of The Foundation: a group of kind Australians who believe in a more equal world. Their ongoing commitment gives us the stability and consistency we need to plan our programs effectively and, ultimately, restore sight to more people.

Camila, by becoming a Visionary today, you will be joining a group of kind Australians who like Fred, want to make the world a better place. Plus, your impact will be doubled.

BECOME A VISIONARY

Restoring sight is a simple yet profoundly powerful act, and as a Visionary, you will make this impact every month. **Our patients count on kind people like you, Camila, so I truly hope you will [take the opportunity to have your monthly donations matched.](#)**

Thank you for believing that everyone has the right to sight—just like Fred did.

Warm regards,
Ian Wishart

The Fred Hollows Foundation **DONATE**

Dear Camila,

Did you see my last email?

I'm writing to let you know the chance to double your impact every month is still open.

Camila, this is an extraordinary opportunity you won't want to overlook. By joining us as a Visionary today, you can double the impact of your monthly donations for an entire year, enabling us to restore sight to twice as many people every month. **However, this offer is exclusive to the first 200 donors, so act quickly to secure your spot.**


DOUBLE MY IMPACT EVERY MONTH

Every month, your Visionary support will prevent another person from going needlessly blind. You will help transform their lives, and the lives of their families too.

Camila, I hope you'll take this opportunity to continue this work and **[make a lasting impact by becoming a Visionary with a matched monthly donation.](#)** Without the support of kind people like yourself, we would not be able to reach vulnerable people around the world.

Thank you for being the kind and compassionate person that you are.

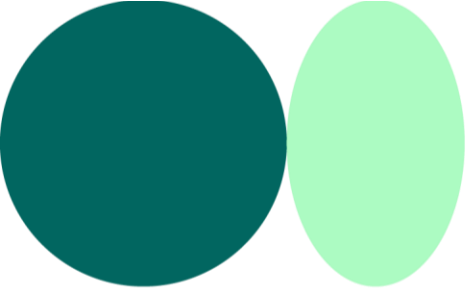
Warm regards,
Ian Wishart



Ian Wishart
CEO, The Fred Hollows Foundation

P.S. 9 out of 10 people who are blind or vision impaired don't need to be. [You can change that with a matched monthly donation.](#)





Strategy – in action

CDP Use Cases in market



Regular Giving Conversion

Double Your Impact Every Month

All monthly donations matched for 12 months!
Limited offer—don't miss out

MATCH MY MONTHLY GIFT



ABOUT FRED

WHAT WE DO

YOU CAN HELP

LATEST

DONATE

GIVE MONTHLY



MANKIND IS TO LOOK AFTER ONE ANOTHER."

- Professor Fred Hollows

Fred Hollows is a legendary Australian whose legacy continues to change the world today.

Fred never took no for an answer, and he never let anyone tell him something couldn't be done - especially when it came to restoring sight.

Fred was taken from us too soon. **But the work he started all those years ago showed us that one person really can make a difference.** And so can you, by becoming a monthly donor.

We need you, now more than ever to carry on his vision. We are living in

Become a monthly donor and keep Fred's vision alive

MONTHLY

ONCE

\$25 Your monthly gift will help restore sight to up to one person

\$50 Your monthly gift can help restore sight to up to two people

\$100 Your monthly gift can help build an eye clinic.

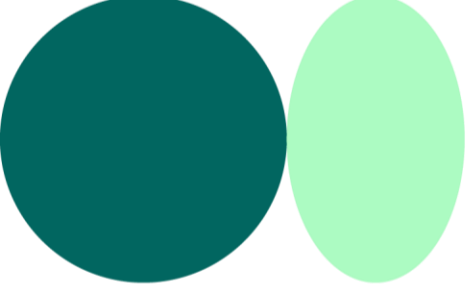
\$ Help us by donating an amount of your choice.

DONATE BY CREDIT CARD

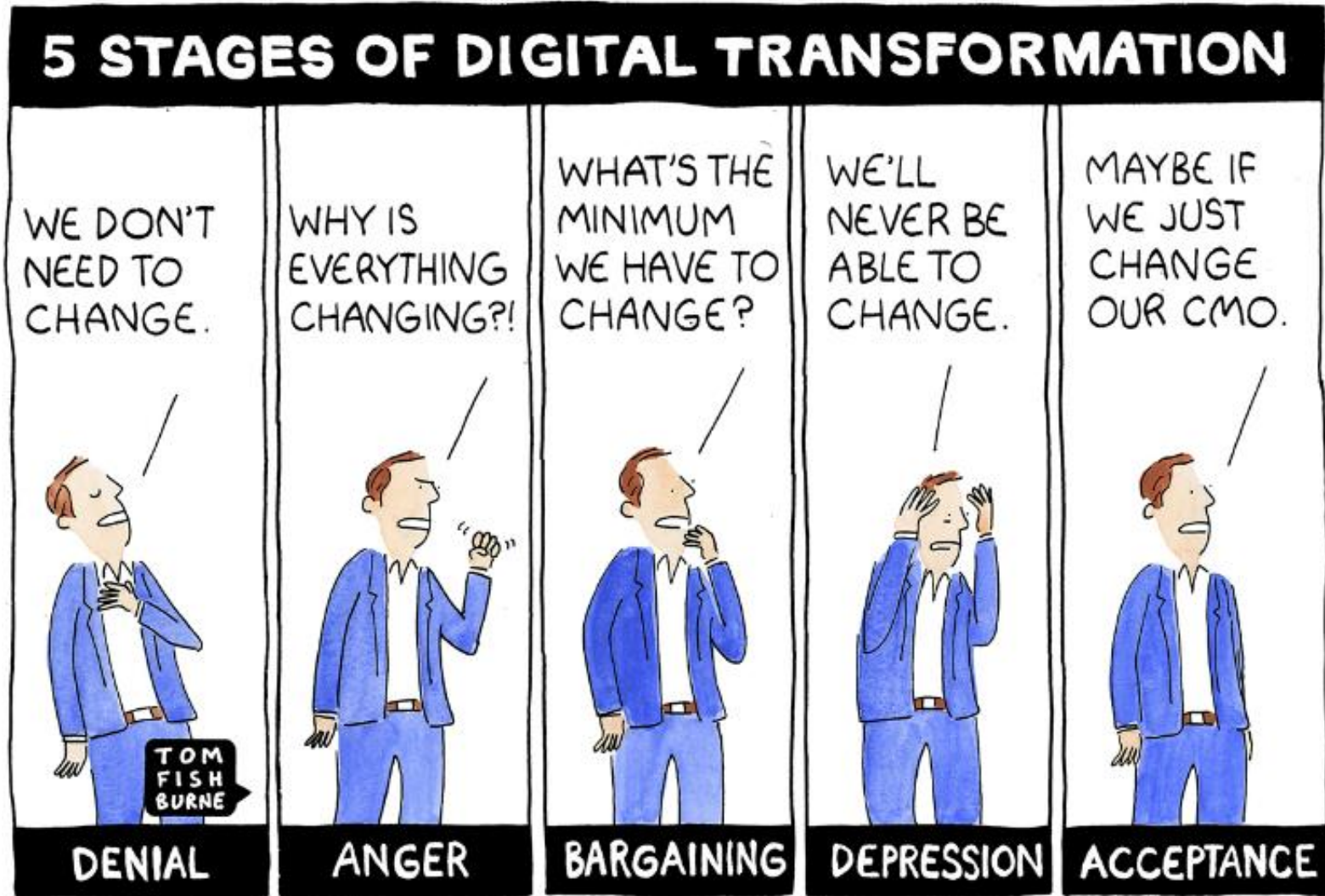
DONATE BY DIRECT DEBIT

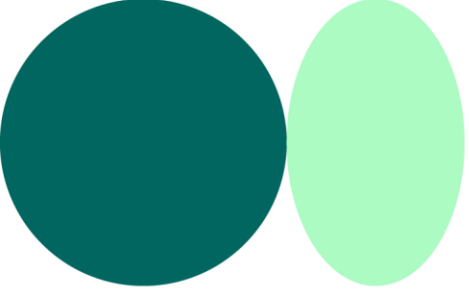


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People



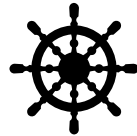


People

Cultivating Internal Support



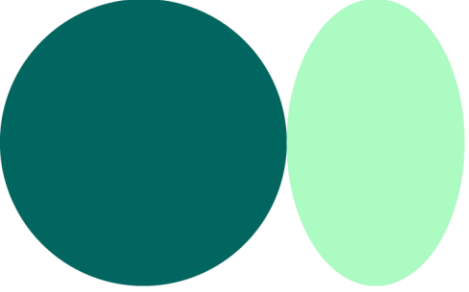
Business case for Senior Leadership investment



Steering Committee for transparent reporting lines and escalations

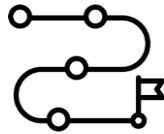


Engaged Key Stakeholders through info sessions, workshops and listening/answering questions



People

External Guidance



Technology Advisor



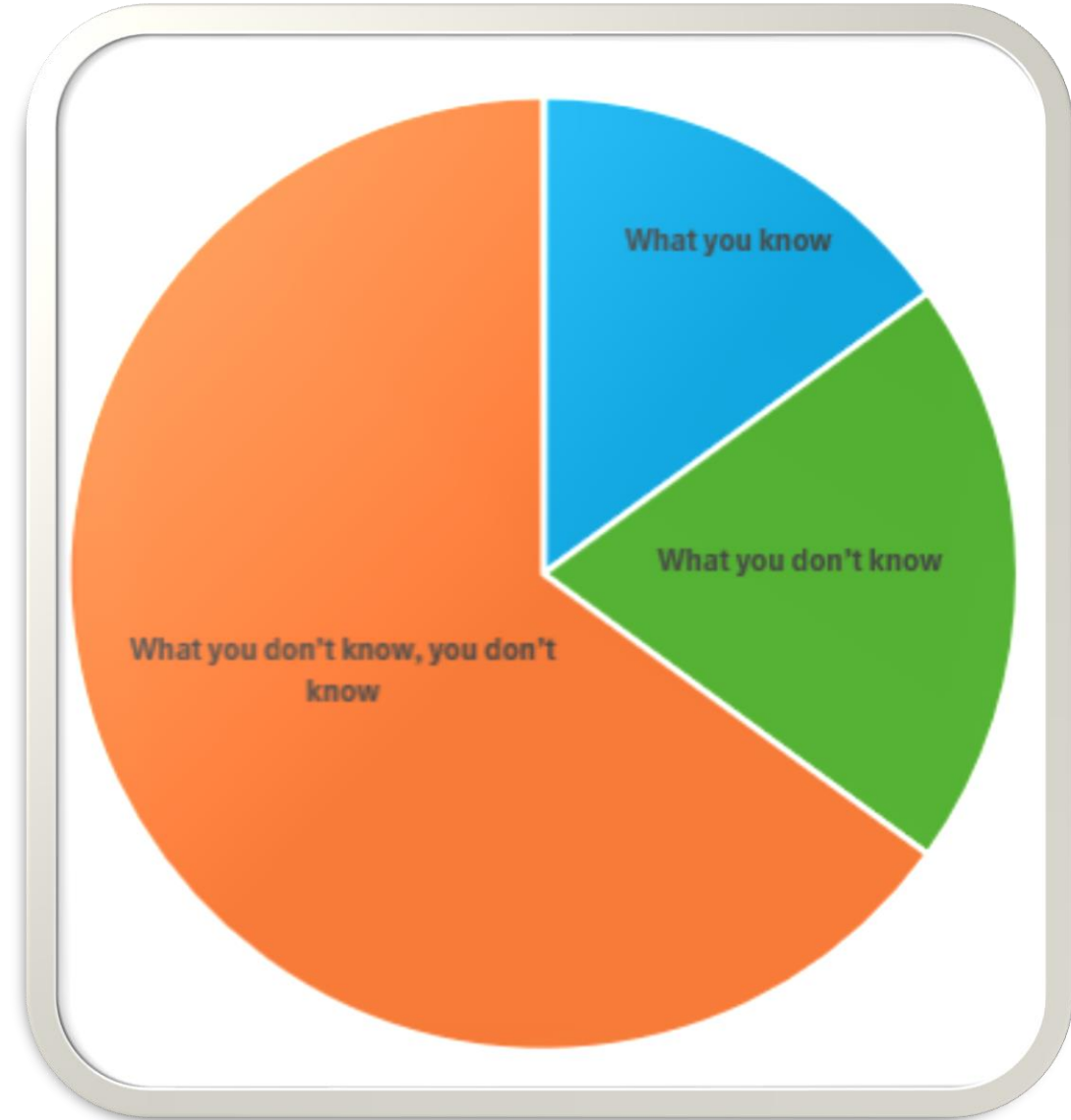
Technology Implementation Partners

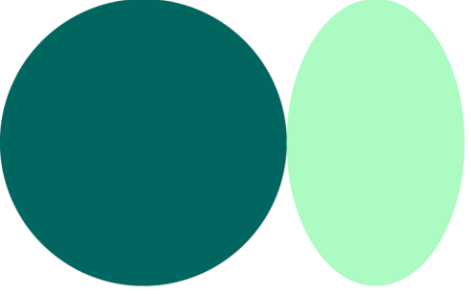


Donor Journey Consultants

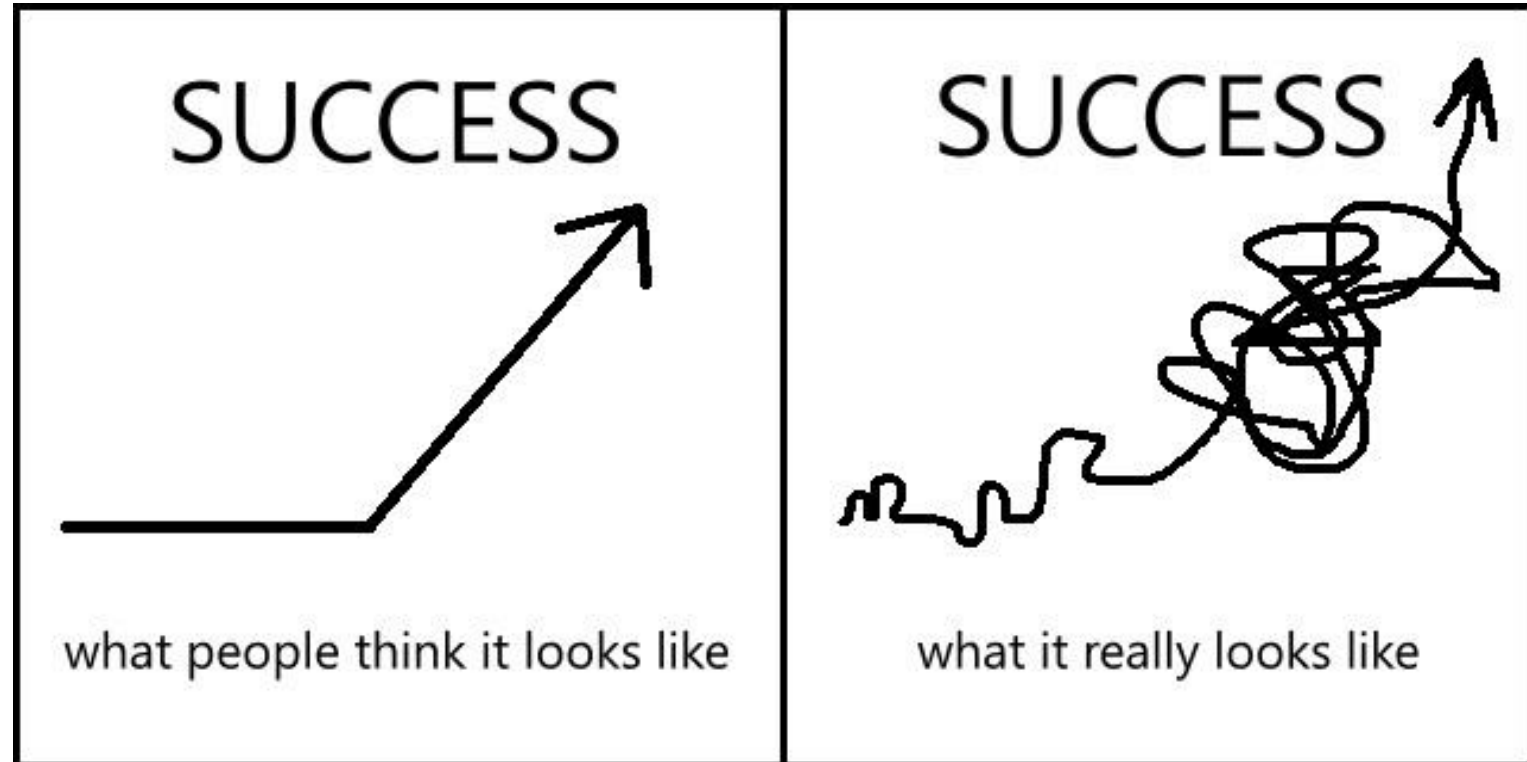


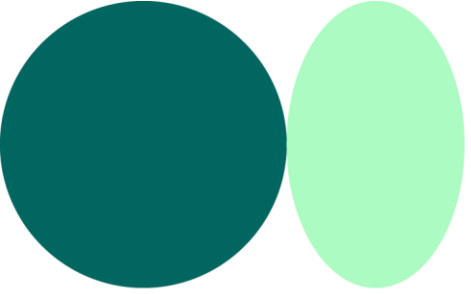
Charities & Organisations





Measuring Success

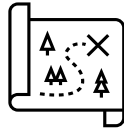




Measuring Success



Clear KPI's for all Use Cases



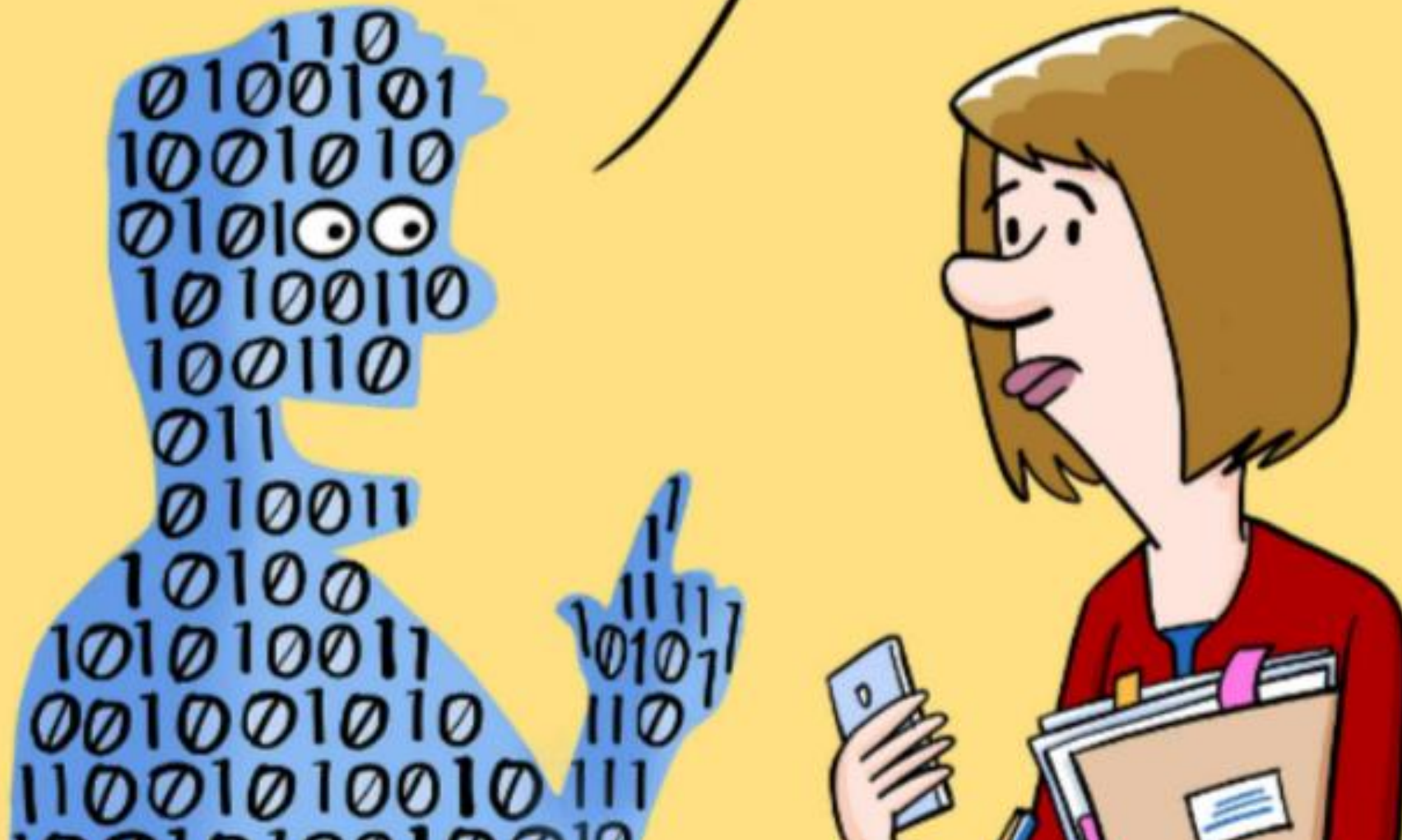
Roadmap for reporting on Donor Strategy

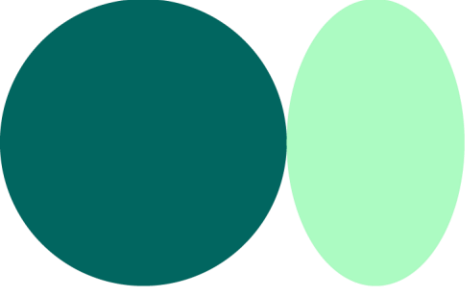


Results take time

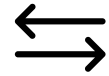


MY DIGITAL TRANSFORMATION
IS ALMOST COMPLETE...





▶▶ What's next?



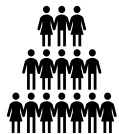
Moving from Project Implementation to Business as Usual



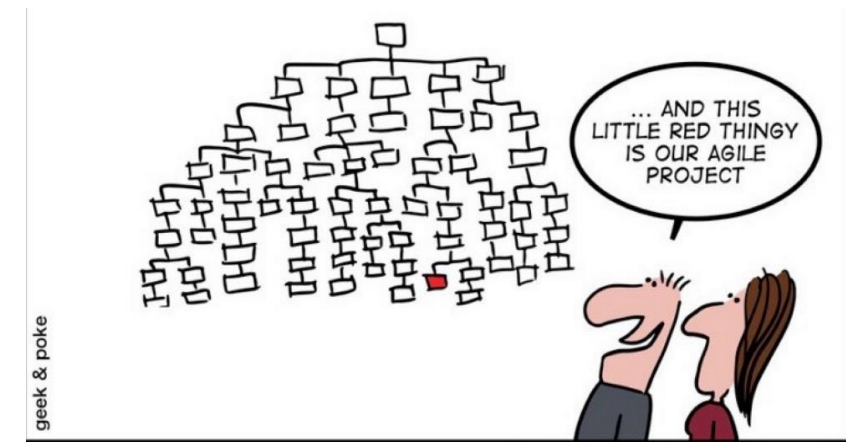
LTV guides our prioritisation of Donor journeys

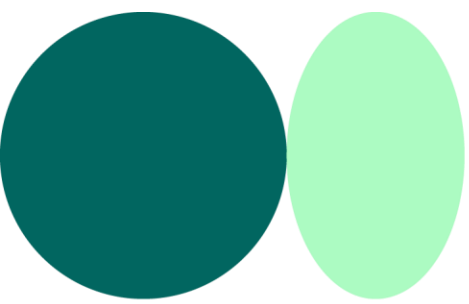


Use the right tools when implementing new journeys



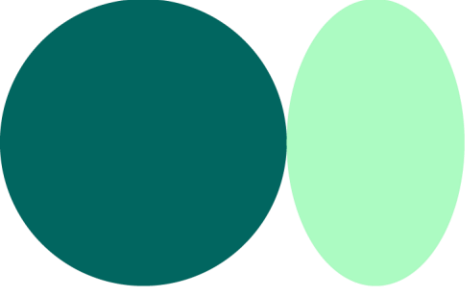
Assess our team structure and ways of working





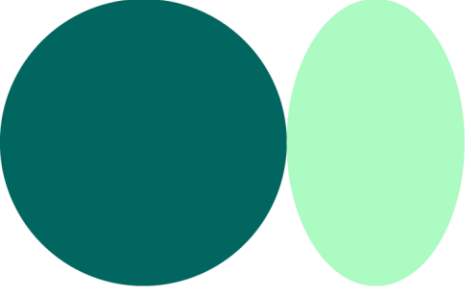
Key Takeaways

1. Defining problem statements and KPIs
2. Get your data in order
3. Change takes time
4. Use the right tool for the right job
5. Ask for help
6. Budget, senior leadership support & capabilities
7. Start somewhere



**"Perfection is the
enemy of the good"**

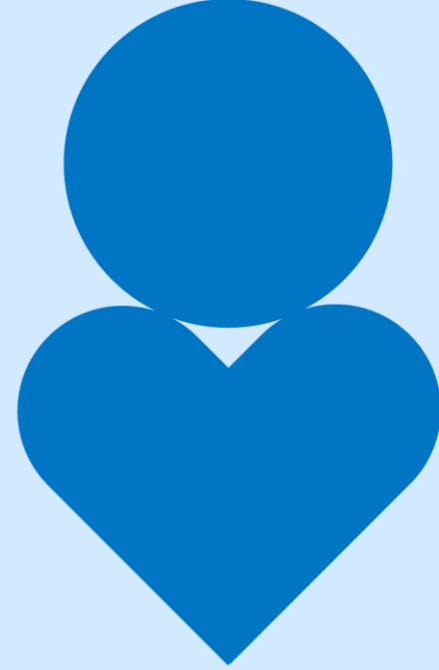
Voltaire



Q&A



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Thank you



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