

Phone and Mobile 101

Really TALK to
your supporters!!



TM101

Telemarketing
is not Evil!

“We’re calling
to let you
know your
auto warranty
has expired.”



“Will you help
me?”



Myths & Misconceptions of Telemarketing



1. Your supporters don't want to be called.

Myths & Misconceptions of Telemarketing



1. Your supporters don't want to be called.
2. No one is calling your supporters.

Who Is Calling Your Supporters?

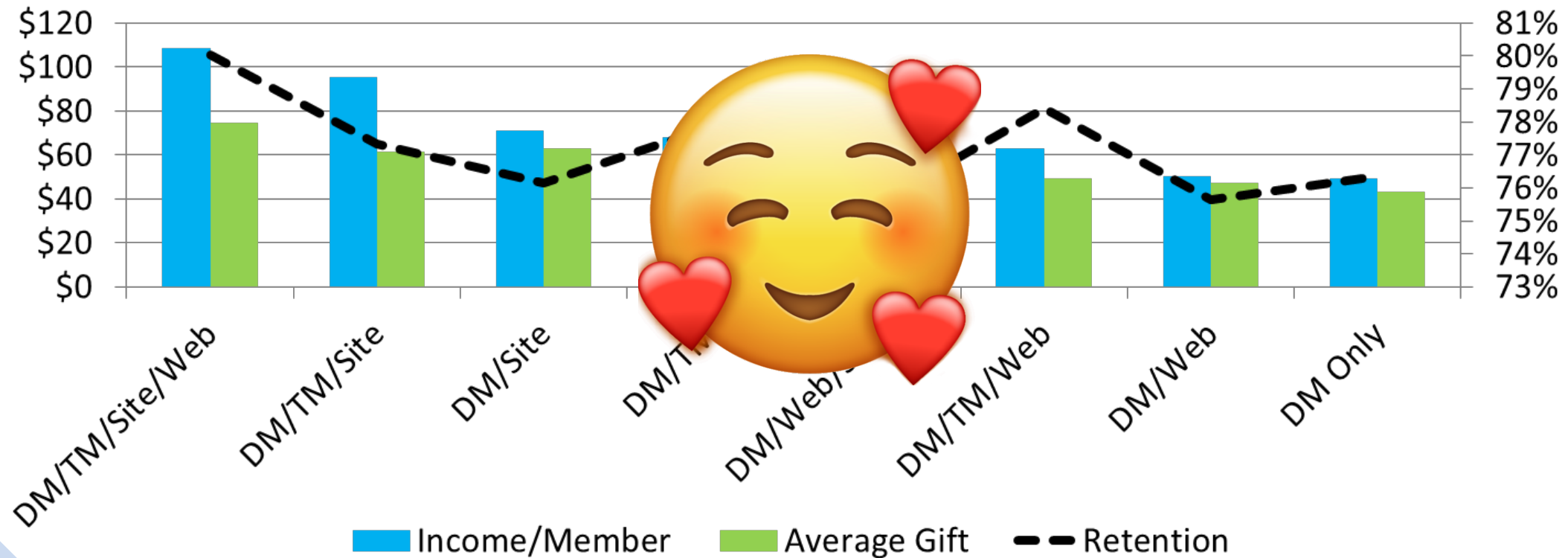


Myths & Misconceptions of Telemarketing



1. Your supporters don't want to be called.
2. No one is calling your supporters.
3. Telemarketing poaches funds from direct mail and other channel.

TM Boosts Other Channels

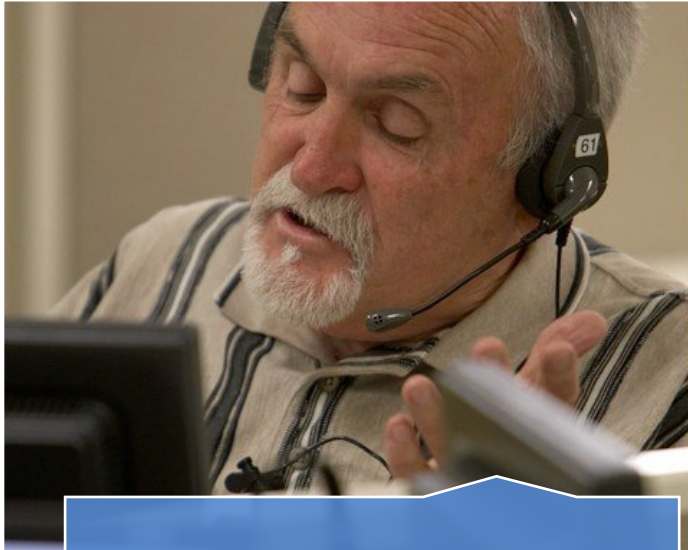


Myths & Misconceptions of Telemarketing

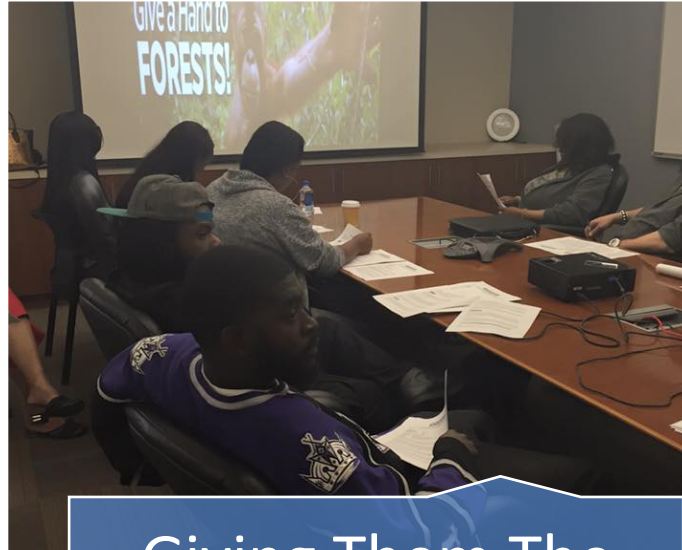


1. Your supporters don't want to be called.
2. No one is calling your supporters.
3. Telemarketing poaches funds from direct mail and other channels.
4. A telefundraising call is no different than a telemarketing call.

The Call Center



The Ideal Caller



Giving Them The
Right Tools



Creating the Best
Team Culture

Addressing Concerns

- Complaints
 - Due Diligence
 - Quality Assurance Departments
 - Supervisor Oversight
- TCPA
 - What are the rules?
- Contact Rates
 - Slight rise in contact rates during pandemic shutdown



How To Use Telemarketing

- Which Organizations Should Consider Testing Telemarketing?



How To Use Telemarketing

- Which Organizations Should Consider Testing Telemarketing?

Essentially any nonprofit should be using phone in their DM strategy unless they are simply too small (i.e. under 10,000 donors)

How To Use Telemarketing

- How many records do you need for a strong campaign?



How To Use Telemarketing

- How many records do you need for a strong campaign?

Over 10,000 records is ideal.
5,000 – 10,000 is doable w a clear
micro-focused strategy.
Ideally you want to be able to work
in daily calling sizes are over 200+
contacts to analyze results.



Types of Telemarketing Campaigns

Sustainer

Renewal

Lapsed
Reinstatement

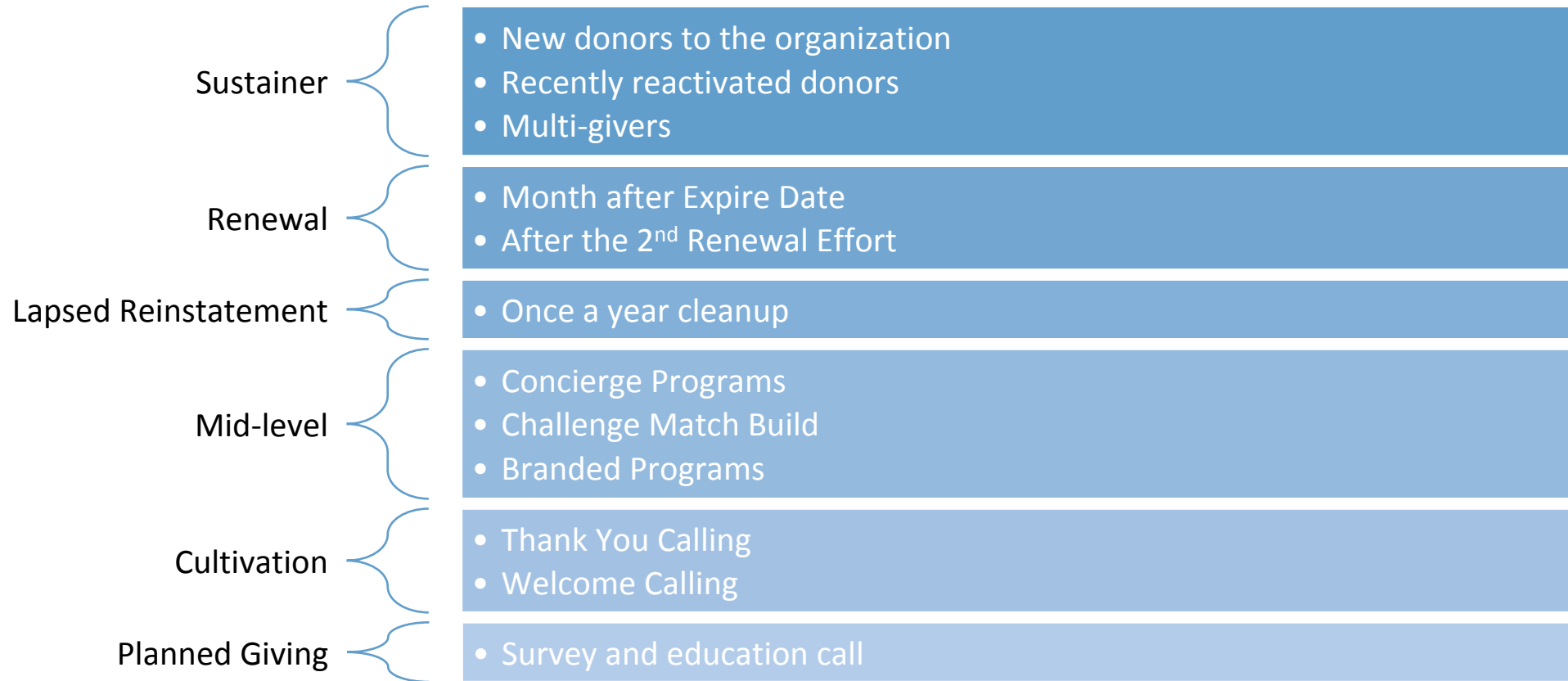
Mid-level

Cultivation

Planned Giving



Types of Telemarketing Campaigns



How To Use Telemarketing

- Introduction
- Presentation

1st ask

2nd ask

- Save your best pitch

3rd ask

- Give another compelling reason to give
- Negotiate
- Assumptive credit card ask

- Credit card rebuttal if necessary
- Whether the call results in a gift or not, thank the donor sincerely before saying goodbye (leave them with a good experience!)

How To Use Telemarketing

Fulfillment
Mail

Phone Append

Data/
Reporting
Setup

Email
Fulfillment

Compliance



How To Use Telemarketing

Fulfillment Mail

Letters to donors who pledged are sent within 24 hours.

Two reminders are sent, either at 14 and 28 day intervals or customized to fit your needs.

Fulfillment tracking comes from your organization to the TM vendor to stop sending letters to fulfilled gifts.



How To Use Telemarketing

Phone Append

Phone appends available include:

Standard Phone Append

NCOA

Cell Phone Append

Line Identification Append

Communicate to your partner how you'd like to receive those phone appended results.



How To Use Telemarketing

Data Reporting/ Setup

Reporting is typically sent nightly.

TM Firms don't process credit cards. Give your partner a few weeks in advance to set up how to send payment files to your cager.

At the end of calling, files are sent back to you showing which records were contacted, which records gave gifts and final results.

Ask your TM partner if you need any other files or reports.



How To Use Telemarketing

Email Fulfillment

Many firms have programs which can send emails to donors.

Emails are either sent immediately or at the end of calling each night.

These emails are usually set up by disposition of the call.

Emails can get a jump on the pledge letter and improve fulfillment.



How To Use Telemarketing

Compliance

To begin calling most firms will need banking info, registration numbers, script and/or letter samples.

Solicitation notices must be signed by the organization.

National registration usually requires 4 – 6 weeks for completion once forms are submitted.

Financial reports are required by the states at up to two different intervals during a year at times. Some documents require a notary.



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- Set Your Partner Up to Win
 - Connect w the Call Team
 - Share updated information / stories from the field / press releases



How To Use Telemarketing

- Focus on broad base segments to start
- Have your partner model for TM responsive donors
- Keep Things Simple
- Set Your Partner Up to Win
 - Connect w the Call Team
 - Share updated information / stories from the field / press releases
- Best Campaigns to Run:
 - Sustainer invite
 - Non-donor sustainer invite
 - Sustainer upgrade
 - Sustainer Reactivation / Recapture







**Advantages of the
Call**

**Personal
Connection**



Texting 101

Meet people where they are!



No other channel gets attention like SMS.

Texts get attention...

- **95%** of texts are opened
- **90%** of texts are read in 3 minutes

... from everyone.

- **87%** of American adults text regularly
- **9 in 10** Americans keep their phone in reach 24 hours a day
- The trends hold **across age, race, and gender**

33% of adults prefer text to other forms of communication

In fact...Americans text TWICE AS MUCH as they call.

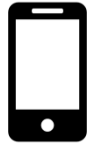


First, the basics.

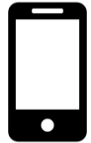


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ALLEN+HUSSEY

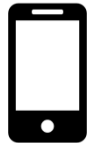
Broadcast



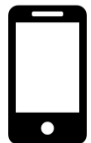
One to many. Broadcast is a “blast message” tool.



Opt-in required. To receive messages, people must explicitly opt-in.

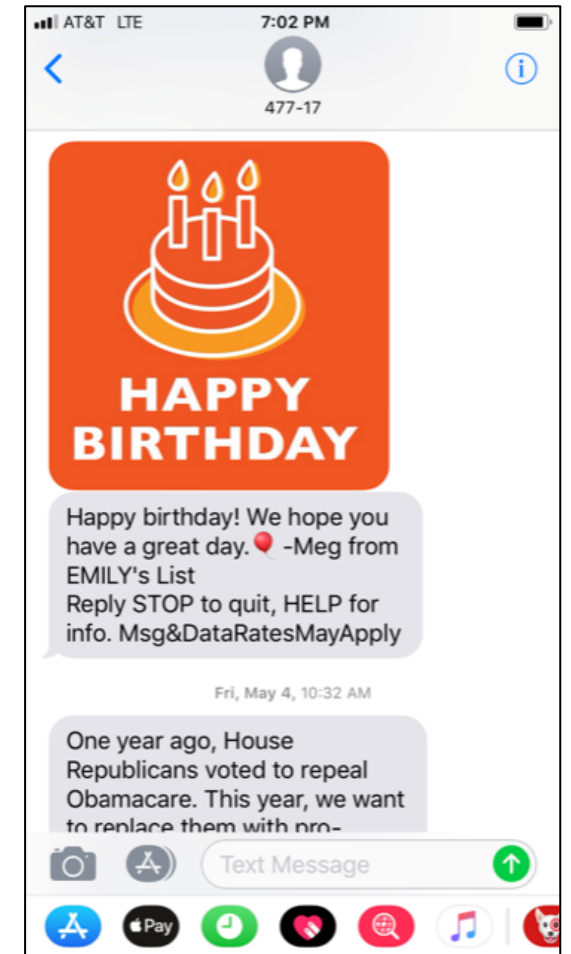
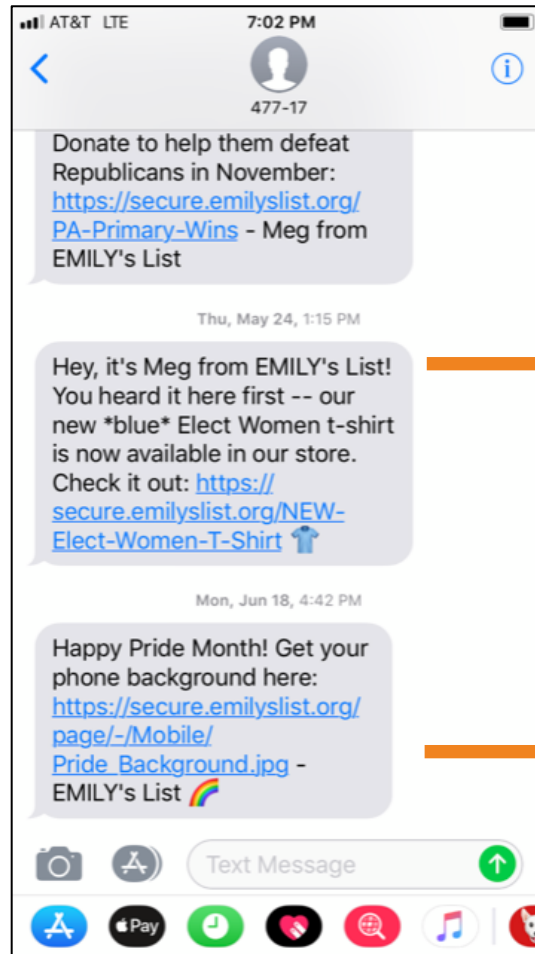
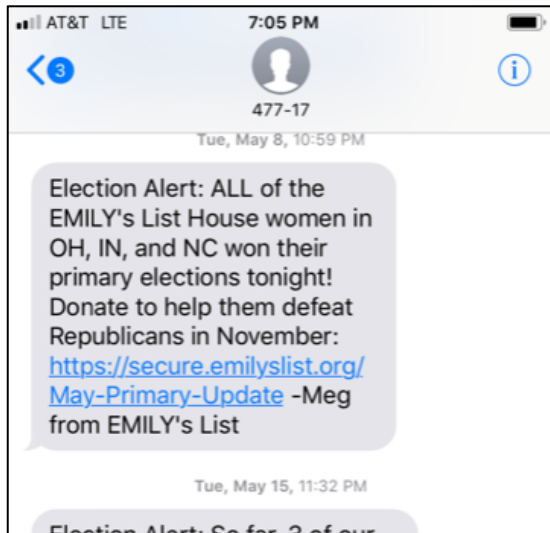


Short code needed. Organizations send these messages through a five digit number.



Program Applications: Advocacy, engagement, communication, fundraising.





Why grow your broadcast program?

Every part of your program will benefit!

**Action rates, click through rates, response rates, conversion rates
2x-4x higher than email or social**

It drives advocacy calls 10x better than email

Subscribers donate more across all channels



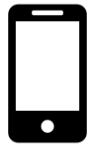
Peer to Peer



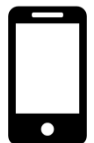
One to one. Text messages are sent by an actual person.



Opt-in may soon be required. Carriers are updating regulations as we speak.



“Regular” phone number. Messages come from a standard 10-digit number

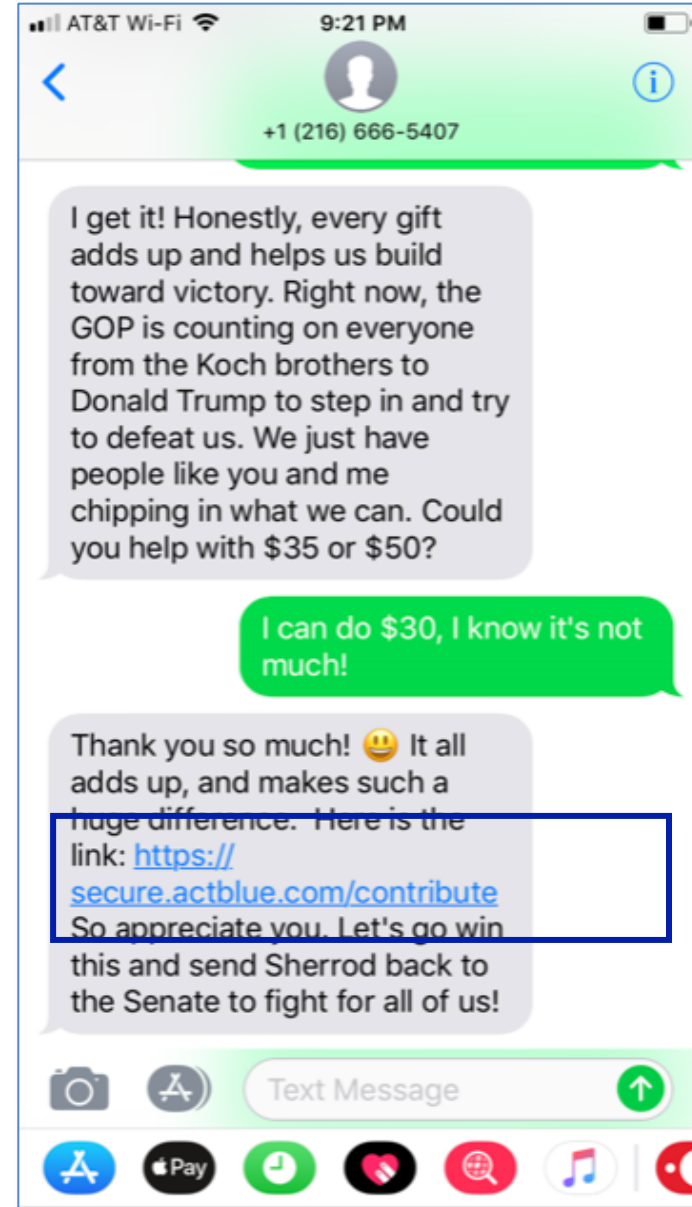
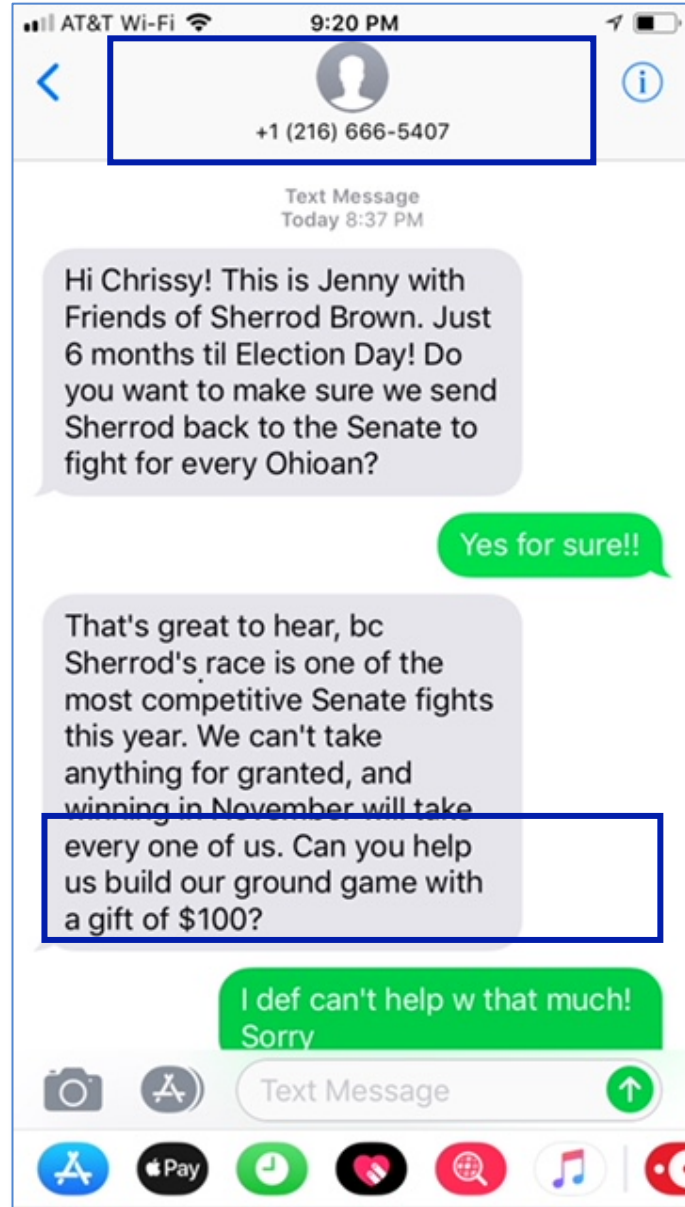


Program Applications: Advocacy, engagement, communication, fundraising.



Texts come from
a local number

Information can be
highly personalized



Everyone is directed
take action

What are the benefits of One to One?

Organizations see extraordinary results across efforts.

Two way conversations with 22% of the people you text

Increase event attendance and participation exponentially

Active donors give 15% more after receiving a text message

A text in tandem with direct mail can lift results by 30%+

Email open rates improve as much as 37%



What is “Text to Give?”



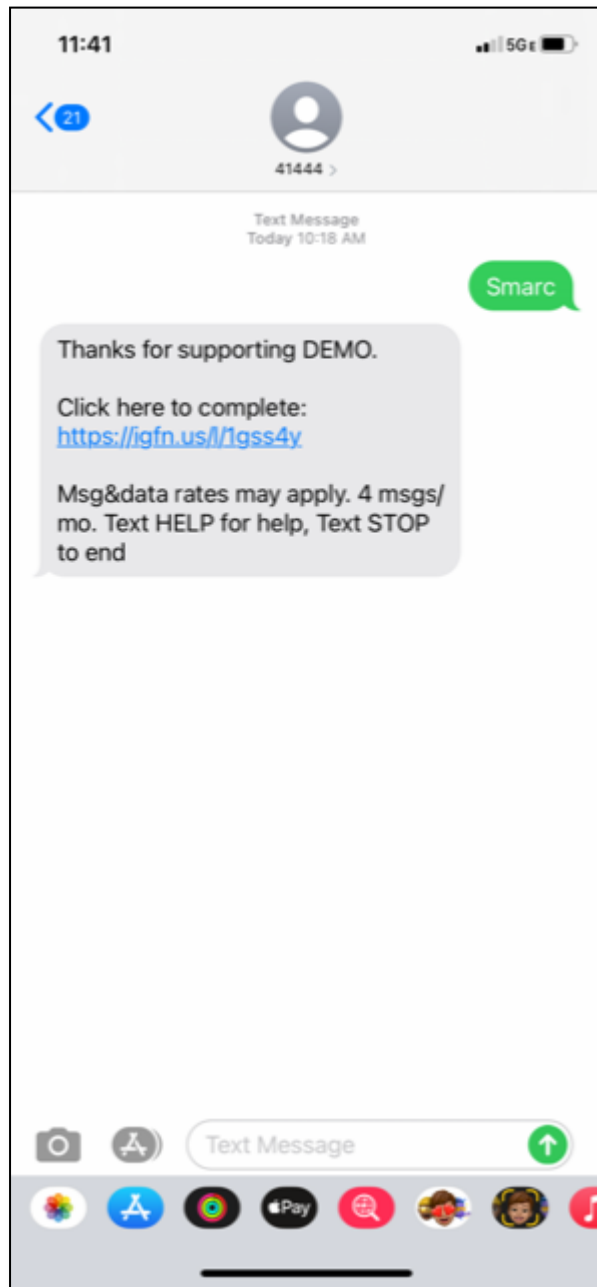
The “Original”

Strictly transactional

Small gifts are added to your cell phone bill

No donor information collected for orgs

Only available to 501 c3s

A screenshot of a mobile web browser displaying the American Red Cross Santa Monica Chapter donation page. The browser address bar shows "app.mobilecause.com". The page features the American Red Cross logo and a "Choose Donation Amount" section with buttons for \$25, \$50, \$100 (selected), and "Other", along with a custom amount input field set to \$100.00. Below this is a "Setup a Recurring Donation" section with buttons for "One Time" (selected), "Weekly", "Monthly", and "Quarterly". The "Contact Information for Tax Receipt" section includes fields for First Name, Last Name, Mobile Number (15103325063), and Email (name@example.com). The "Donation Information" section includes a secure payment notice, a Card Number field, an Expiration Date field (MM/YY), and a CVV field (123). The bottom of the screen shows a mobile browser navigation bar with back, forward, and share icons.

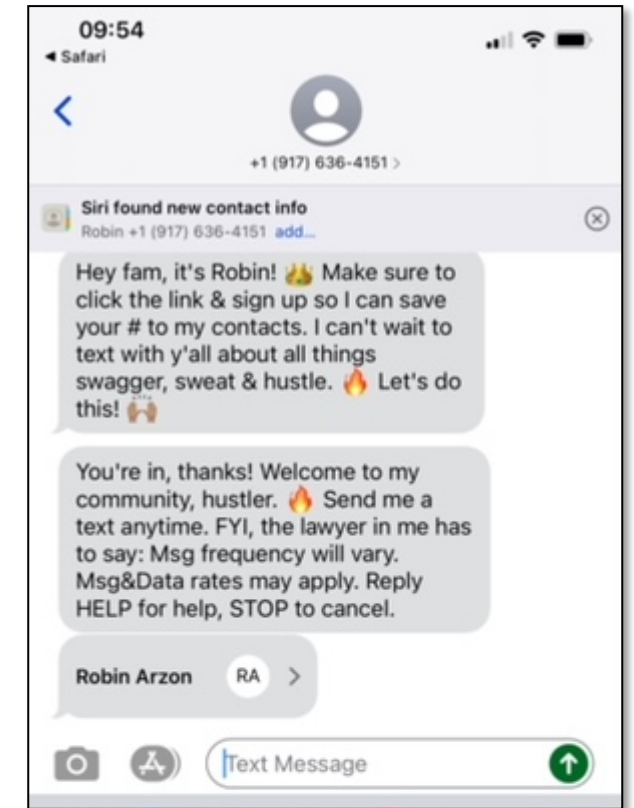
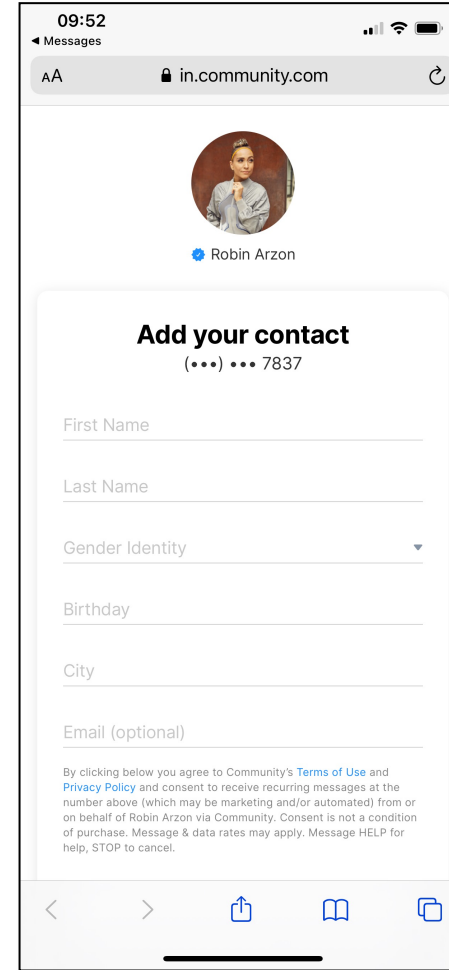
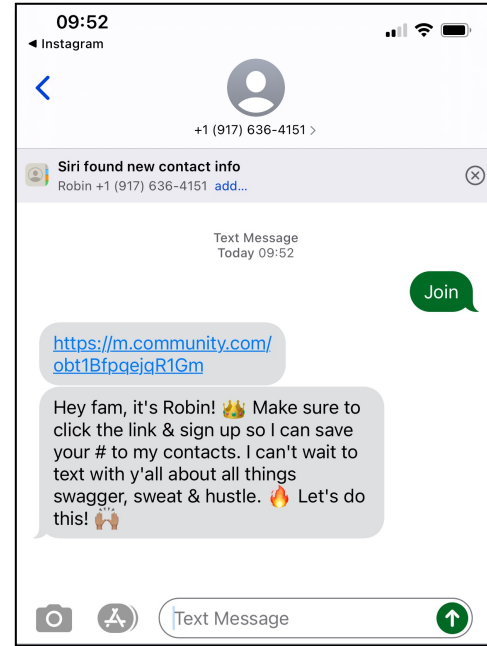
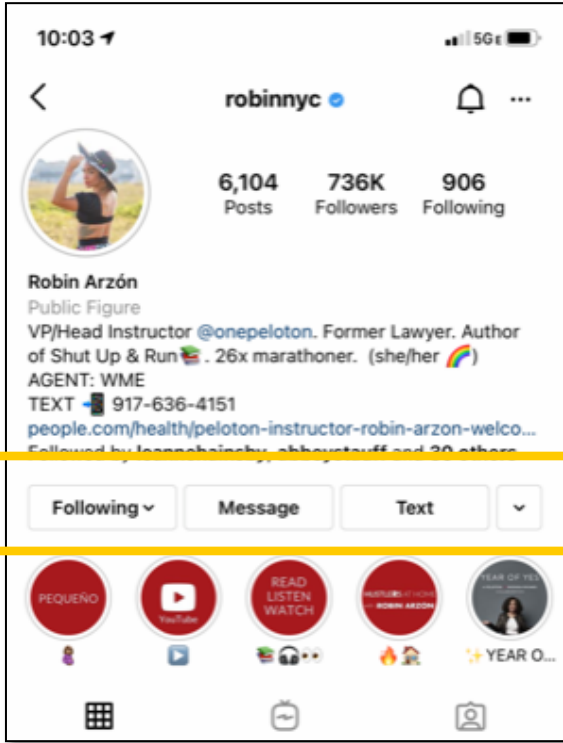
Use Broadcast

Text in a keyword

Direct to a website

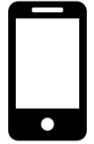
Collect all donor info

Available to all orgs



**Create a personal experience
with a 10 digit number**

Best Practices to Get Started



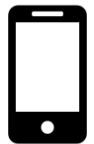
Be real. Keep it short, sweet, and authentic.



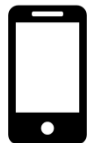
Add value. Make sure you're creating a positive experience.



Integrate. Don't let texting be an afterthought.



Collect numbers everywhere. Webforms, social, direct mail, at events... anywhere!



Text! Build rapport, deepen engagement – and raise more money!



Thank You!



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