

Phone and Mobile 101

Really TALK to your supporters!!



TM 101

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



**“Will you
help me?”**



Myths and Misconceptions of Telemarketing



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

Who Is Calling Your Supporters?

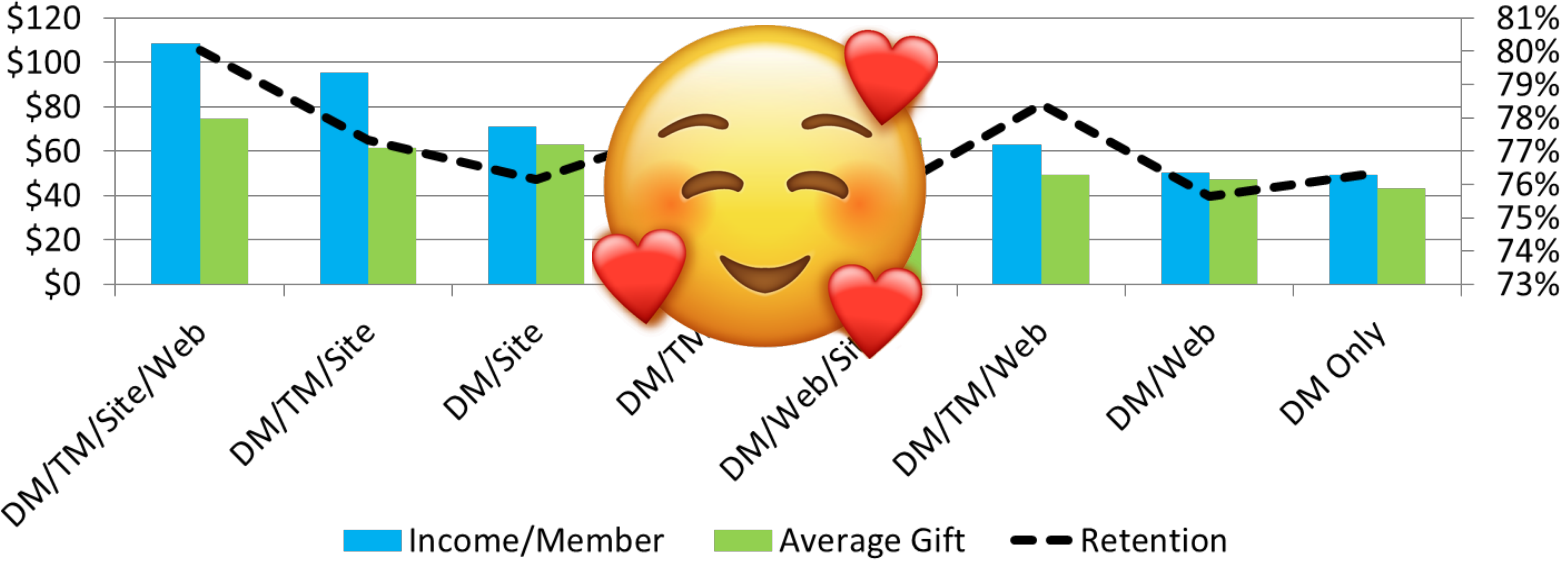


Myths and Misconceptions of Telemarketing



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2. No one is calling your supporters
3. Telemarketing poaches funds from Direct Mail and other channels

TM Boosts Other Channels

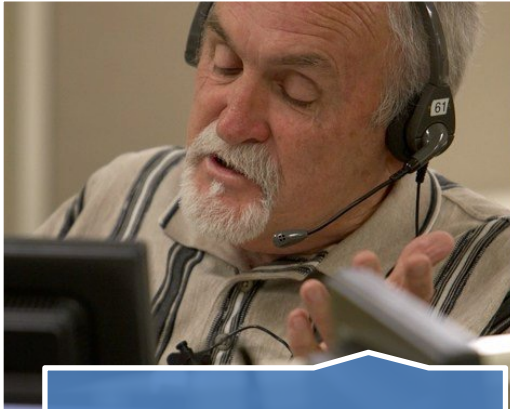


Myths and Misconceptions of Telemarketing



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

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?

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

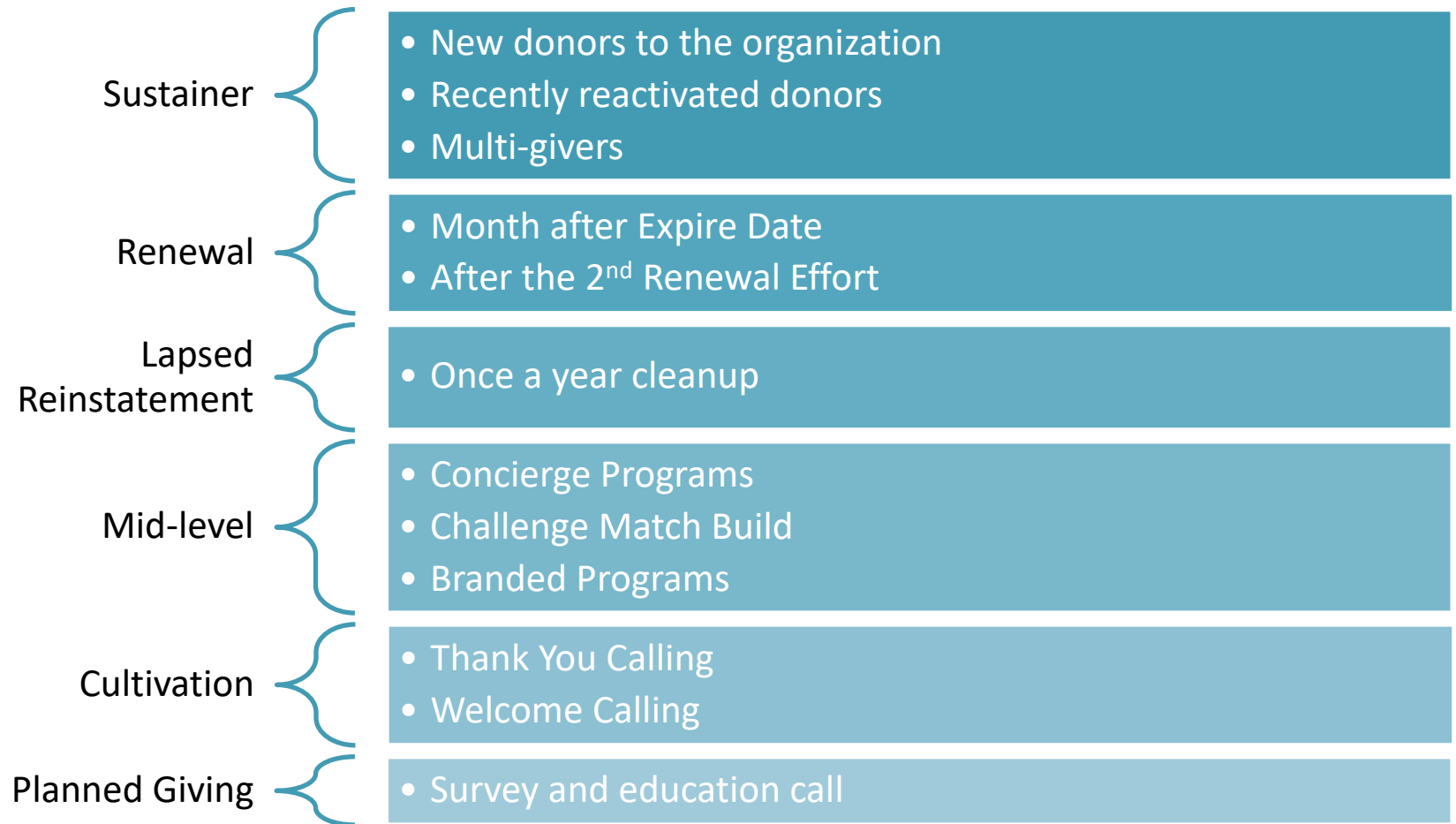
Lapsed
Reinstatement

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

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.

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.

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.

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.

How To Use Telemarketing



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



Texting 101

Meet people where they are!



CHAPMAN CUBINE
ALLEN+HUSSEY

No other channel gets attention like text.

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.

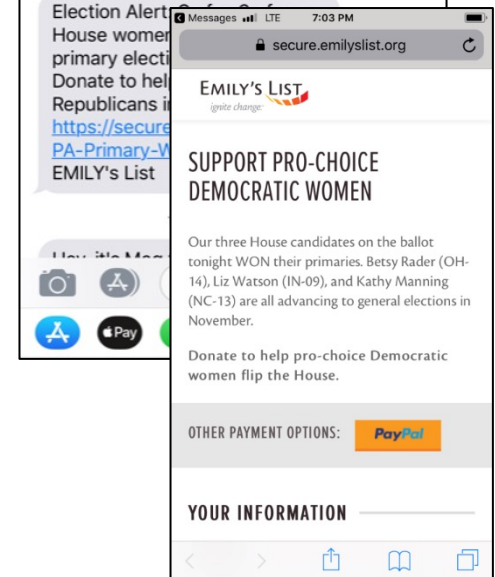
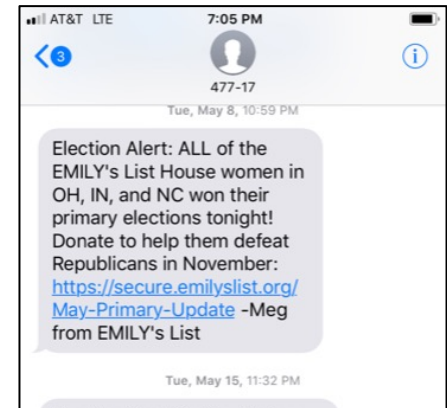
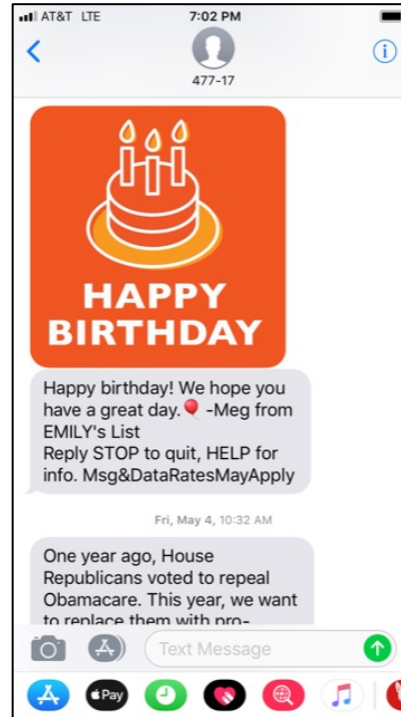
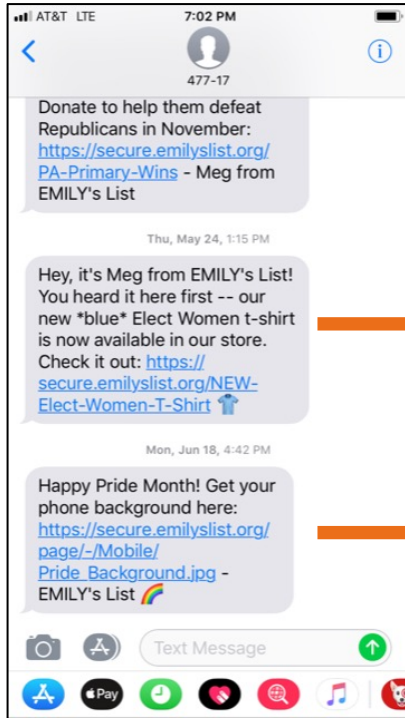
Broadcast

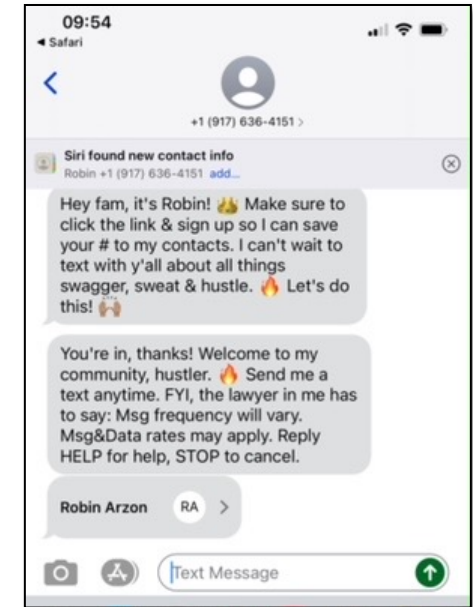
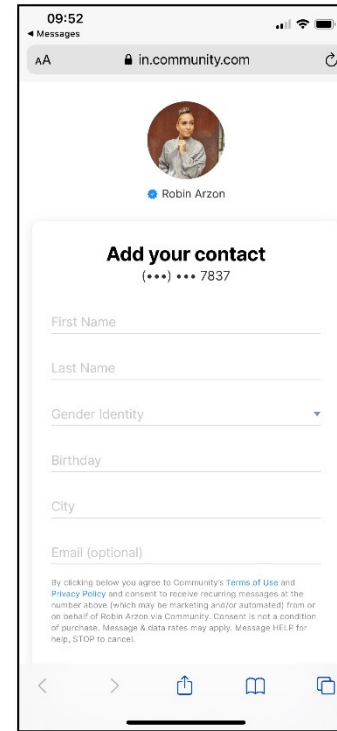
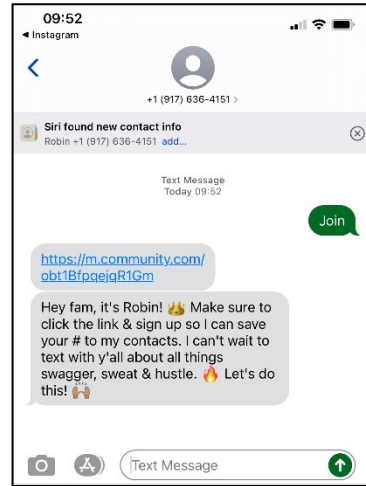
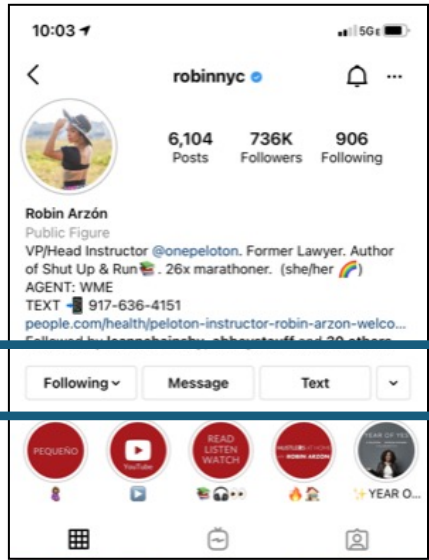
One to many. Broadcast is a “blast message” tool.

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

Short code/toll-free # needed. Messages through a five digit or toll-free number.

Program Applications: Advocacy, engagement, communication, fundraising.





Create a donor-oriented experience with a 10-digit number

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

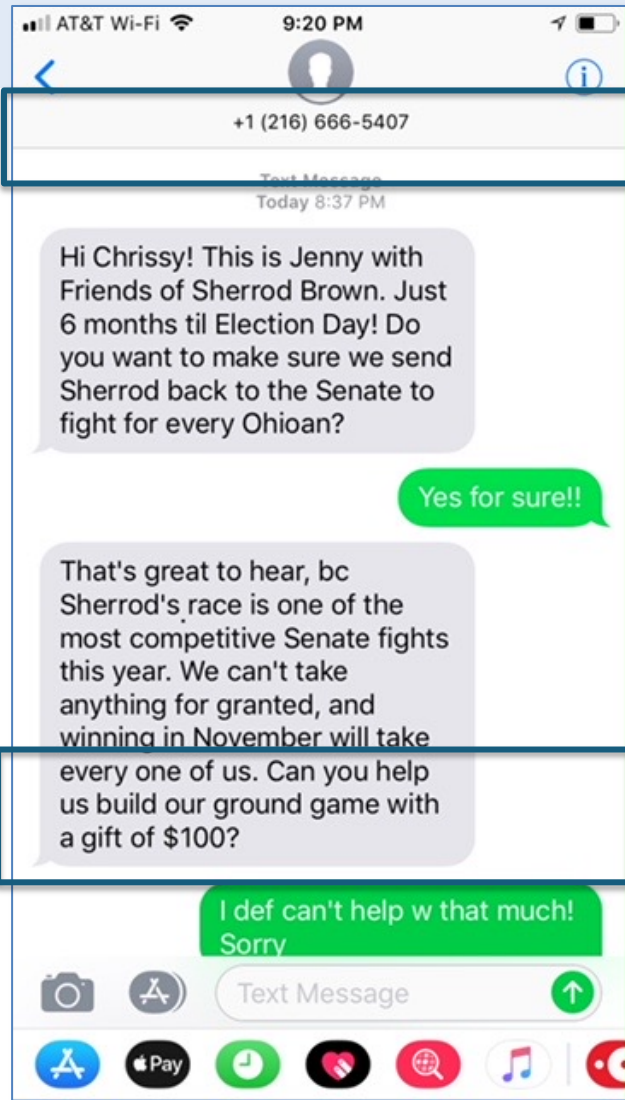
One to one. Text messages are sent by an actual person

Changing regulatory rules. Carriers are updating regulations as we speak

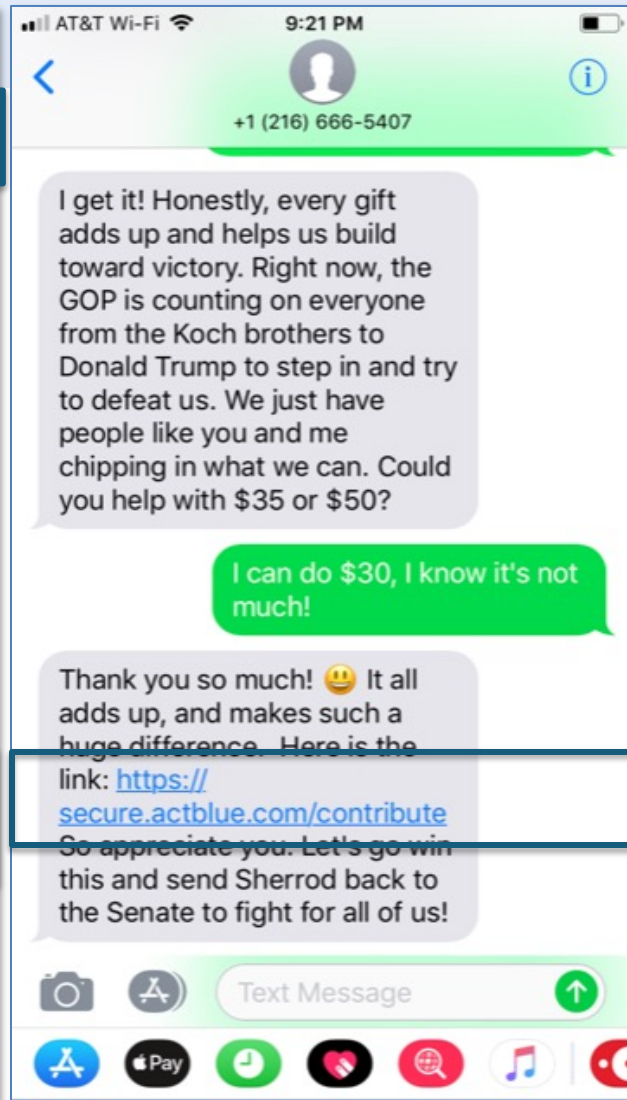
“Regular” phone number. Messages come from a standard 10-digit number

Program Applications: Advocacy, engagement, communication, fundraising

Texts come from a local number



Information can be highly personalized



Everyone is directed to take action

What are the benefits of Peer to Peer?

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%

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



TEXT TO GIVE TO HELP FIGHT COVID-19

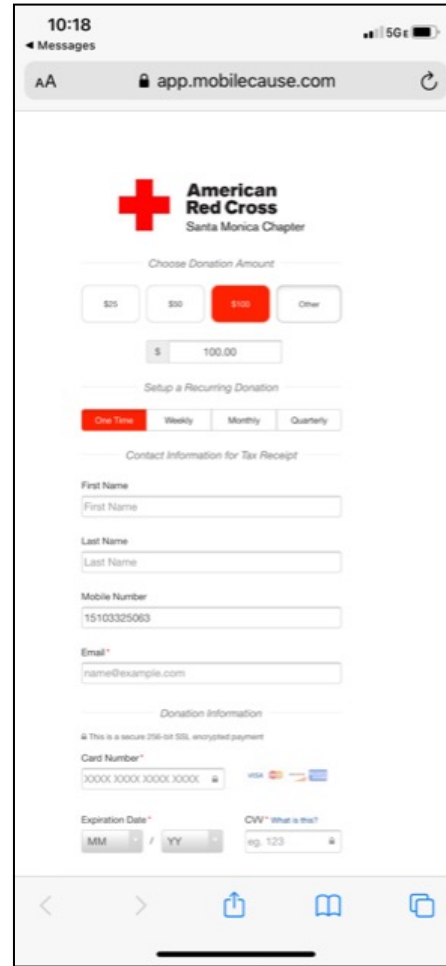
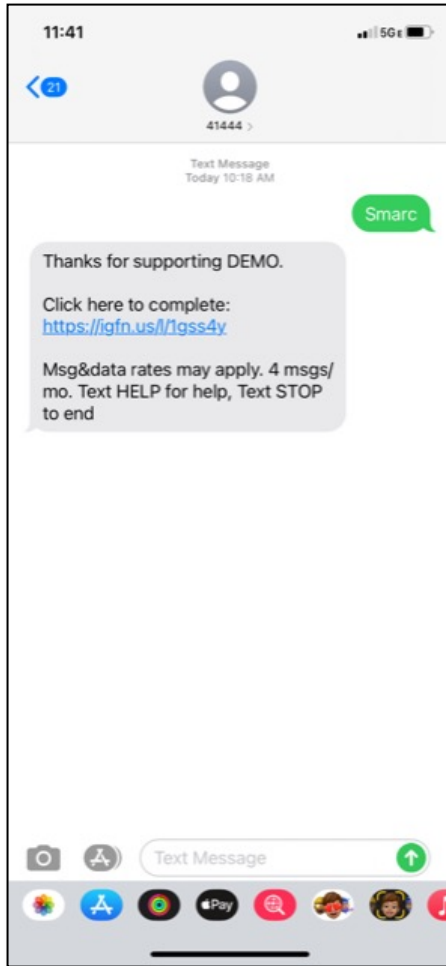
GIVE **TEXT 501501**
TO GIVE \$25, SEND WHO25
TO GIVE \$50, SEND WHO50

Available on all U.S. mobile carriers. Messaging rates may apply.

www.covid19responsefund.org

World Health Organization | UNITED NATIONS FOUNDATION | SWISS PHILANTHROPY Foundation

Text to Give



The “New Wave”

Text in a keyword

Direct to a website

Collect all donor info

Available to all orgs

THANKS FOR SIGNING UP!

Very simply, we work to elect Democratic pro-choice women to office. And we cannot do it without supporters like you.

Please donate today and help elect more women leaders like Kamala Harris, Tammy Baldwin, and Elizabeth Warren.

OTHER PAYMENT OPTIONS: 

REQUIRED:

Cell Phone Number:

DONATE

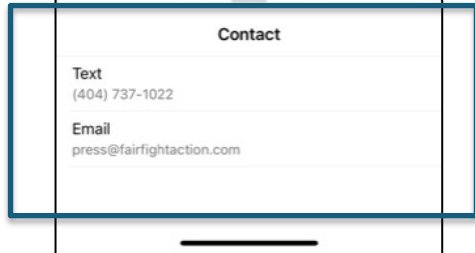
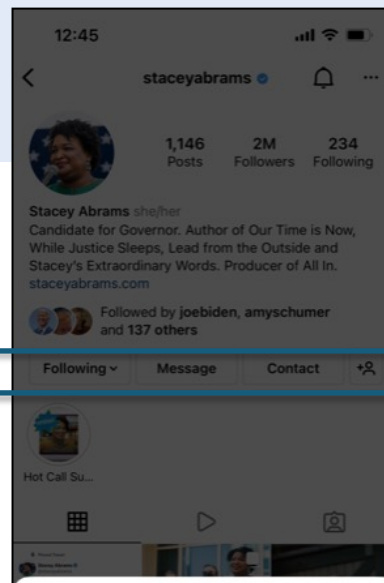
TERMS & CONDITIONS

By clicking this button, I confirm that the following statements are true and accurate.*

1. This contribution is made from my own funds, and not from those of another.
2. This contribution is not made from the general treasury funds of a corporation, labor organization or national bank.
3. I am not a federal contractor, nor am I a foreign national who lacks permanent resident status in the United States.
4. This contribution is made on a personal credit card for which I have the legal obligation to pay, and is not made either on a corporate or business entity card or on the card of another person.

Federal law requires us to use our best efforts to collect and report name, mailing address, occupation and name of employer for individuals whose contributions exceed \$200 in a calendar year and in the case of candidates, election cycle.

By providing my mobile phone number, I agree that EMILY's List and its representatives may send me periodic text messages about ways to take action and support EMILY's List. Standard message and data rates may apply. Text STOP to stop and HELP for help.



Donor Information

First Name Last Name

Street Address

City State

- State -

Email

Mobile Phone (Optional)

Yes, keep me informed about LDF's work via text.

Yes, sign me up for email updates.

We're launching our campaign to build a stronger Georgia, and it begins with you. **Join us.**

First Name Postal Code

Email

Cell Phone (Optional)

Join Us

*By providing your cell phone number, you are consenting to receive recurring automated text messages & automated calls from Stacey Abrams and Abrams for Governor with news, updates, and information about the campaign and related issues. Message frequency will vary. Message and data rates may apply. Text HELP for more information. Text STOP to stop receiving messages. Privacy policy and SMS terms available at: staceyabrams.com/privacy-policy/.

Donate

Please charge my renewal in the amount of

\$ _____ to my:

- American Express Visa
 Mastercard Discover

NAME AS IT APPEARS ON THE CARD

CARD #

EXPIRATION DATE

SIGNATURE

DATE

Federal law requires us to use our best efforts to obtain, maintain, and submit the name, mailing address, occupation, and name of employer for each individual whose contributions exceed \$200 in a calendar year.

OCCUPATION

NAME OF EMPLOYER

IF SELF-EMPLOYED, PLEASE PRINT NAME OF BUSINESS. IF RETIRED, PLEASE PRINT "RETIRED."

EMAIL ADDRESS

- Please send me information about leaving a gift to EMILY's List in my will or trust or by beneficiary designation.
 I have already included EMILY's List in my will or estate plan.

- Yes, I'd like to receive periodic automated text messages and calls on my mobile number from EMILY's List. For SMS, standard message and data rates may apply. Text STOP to cancel or HELP for help. Privacy policy: emilyslist.org/go/privacy.

Cell Phone: _____

Please charge my gift to: Visa Mastercard AmEx Discover

Name as it appears on card

Card #

Exp. date

Signature

Please provide your email address to stay up to date on DGA News:

Contributions or gifts to the DGA are not tax-deductible. Contributions and membership dues are used to support DGA's activities and to make non-federal contributions to support the election of Democratic candidates for governor. Contributions will be used at DGA's sole discretion to support its programs and activities. The DGA may use all or part of a contributor's funds, and disclose them as necessary, in states of its choosing. DGA files public disclosure reports with the IRS and states in accordance with state election laws. Please confirm that your name and address on the front of the card are correct and provide your occupation and employer information below.

Occupation

Name of Employer

If self-employed, please print name of business. If retired, please print "retired."

Address

TEXT LEADERS TO 30201 FOR OFFICIAL DGA UPDATES!

By providing your cell phone number, you consent to receive periodic committee updates through automated text messages from the Democratic Governors Association. Msg&Data rates may apply. Txt HELP for help, STOP to end. <https://democratcgvomors.org/privacy-policy/>



Paid for by the Democratic Governors Association.

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!

Best Practices to Get Started



Caroline Mendez
Vice President of Client Services
SD&A Teleservices
323-787-6849
cmendez@sdatel.com



Chrissy Hyre
Principal, Senior Vice President
CCAHA
510.332.5063
chyre@ccah.com