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Maximizing Telemarketing – A Conversation

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Agenda for Today's Conversation

- Program Overviews
- Reality Check – What does the data say?
- Challenges and Opportunities
- Best Practices

Today's Reality – Program Overviews



Program Overviews - Results

- Are dollar and donor numbers increasing, decreasing, remaining flat?
- How is success measured and how has this changed over time?

Program Overviews - Logistics and Strategy

- Is the program managed internally or by a vendor?
- What tools (software, etc.) are used to run the program?
- What is the main goal of phonathon (acquisition, pipeline building)?
- Are you considering the “Stanford Solution?”

What Does the Data Say?



Giving by Source

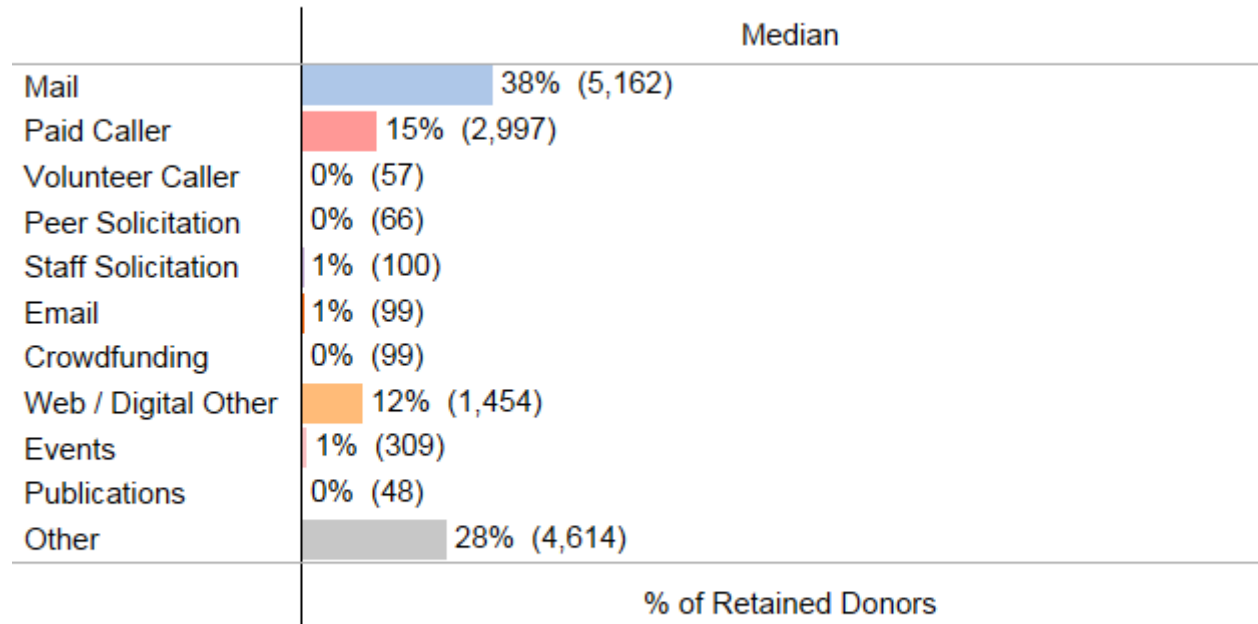
Active Donor and Revenue Comparison by Source (2016)

	Median	
	% of Donors by Source	% of Revenue by Source
Mail	35%	18.9%
Paid Caller	22%	5.4%
Volunteer Caller	0%	0.0%
Peer Solicitation	0%	0.1%
Staff Solicitation	1%	3.2%
Email	1%	0.6%
Crowdfunding	2%	0.5%
Web / Digital Other	12%	10.7%
Events	2%	1.7%
Publications	0%	0.1%
Other	32%	55.7%
	Donors	Revenue
	24,452	\$13,065,366

Percent of Donors by Source may add to more than 100% if a donor gave to more than one source in the current year. Median percentages may not add to 100%.

Phonathon Plays a Part in Retention

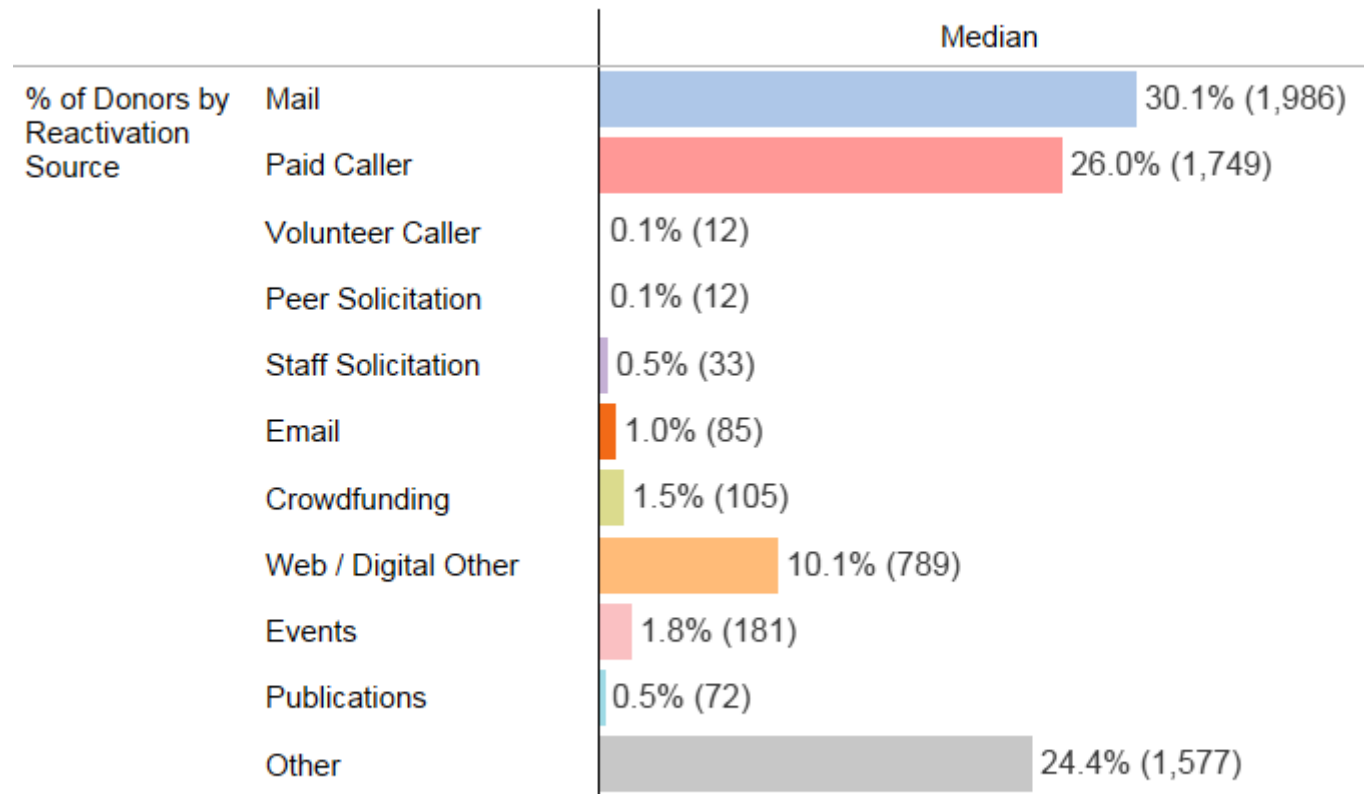
Distribution of Retained Donors by Retention Source in 2016



PY = the prior year of giving. CY = the current year. Includes only donors who were not new to the file in the prior year. Includes only donors who had given in the prior year and who were retained in the current year. The number of donors appears in parentheses after the donor percentage. Percentages add to 100% for each school.

Phonathon is Supporting Reactivation

Distribution of Reactivated Donors by Reactivation Source in 2016



Includes only donors who last gave 2 years prior to the current year or earlier before lapsing and who were reactivated in the current year. The number of donors or revenue appears in parentheses after the donor percentage. Percentages add to 100% for each school.



Phonathon is Driving Acquisition

Distribution of New Donors by Origin Source (2016)

	Donors	Revenue	Median		% of Donors	% of Revenue
			Revenue per Donor	Gifts per Donor		
Mail	330	\$42K	\$119	1.14	8%	8%
Paid Caller	877	\$88K	\$73	1.10	28%	13%
Volunteer Caller						
Peer Solicitation	8	\$1K	\$37	1.17	0%	0%
Staff Solicitation	15	\$13K	\$655	1.10	1%	2%
Email	48	\$6K	\$144	1.20	2%	1%
Crowdfunding	262	\$12K	\$83	1.08	6%	3%
Web / Digital Other	452	\$74K	\$133	1.18	16%	18%
Events	144	\$21K	\$127	1.17	4%	3%
Publications	10	\$1K	\$143	1.09	0%	0%
Other	763	\$205K	\$269	1.22	20%	43%

Medians will not always add to 100%.

So....

- Is it the chicken or the egg? Is this a function of the channel or of strategy?
- Can declining ROI be justified?
- How can digital fundraising replace the losses?

Challenges and Opportunities

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What are the biggest challenges?

- Difficulty in reaching prospects/diminishing contacts
- Shifting alumni populations, such as alumni living abroad
- Inability to find and retain phone numbers
- Difficulty maintaining staff, both professionals and students
- Decreasing support from leadership – COST
- Poor fulfillment rates
- Other challenges?

What are the biggest opportunities?

- This is still the #1 way to acquire donors (based on the data)
- Important segment of a multi-channel strategy – phone can drive online giving
- Average gifts are up even as donor numbers are down
- Sustaining giving tool
- Building our professional bench
- Other opportunities?

Best Practices

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Maximizing the Telemarketing Strategy – Best Practices

- True multi-channel approach that integrates phonathon into the overall annual giving strategy
- Maximize digital opportunities (social media, online ads, etc.)
- Expand the audience – parents, friends, grateful clients, etc.

Maximizing the Telemarketing Strategy – Best Practices

- How long since caller training was reviewed?
- Empower students – pipeline building
- Alternate scheduling
- Pre-call communications
- Ease of fulfillment
- Test strategies – what have you got to lose?!

Maximizing the Telemarketing Strategy – Best Practices

- Create synergies with campus partners – how else can we use the space?
 - Cultivation and stewardship calls
 - Planned giving warm leads
 - Event RSVPs
 - Recruiting (admissions, greek system, etc.)



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Further Conversation

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