

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?



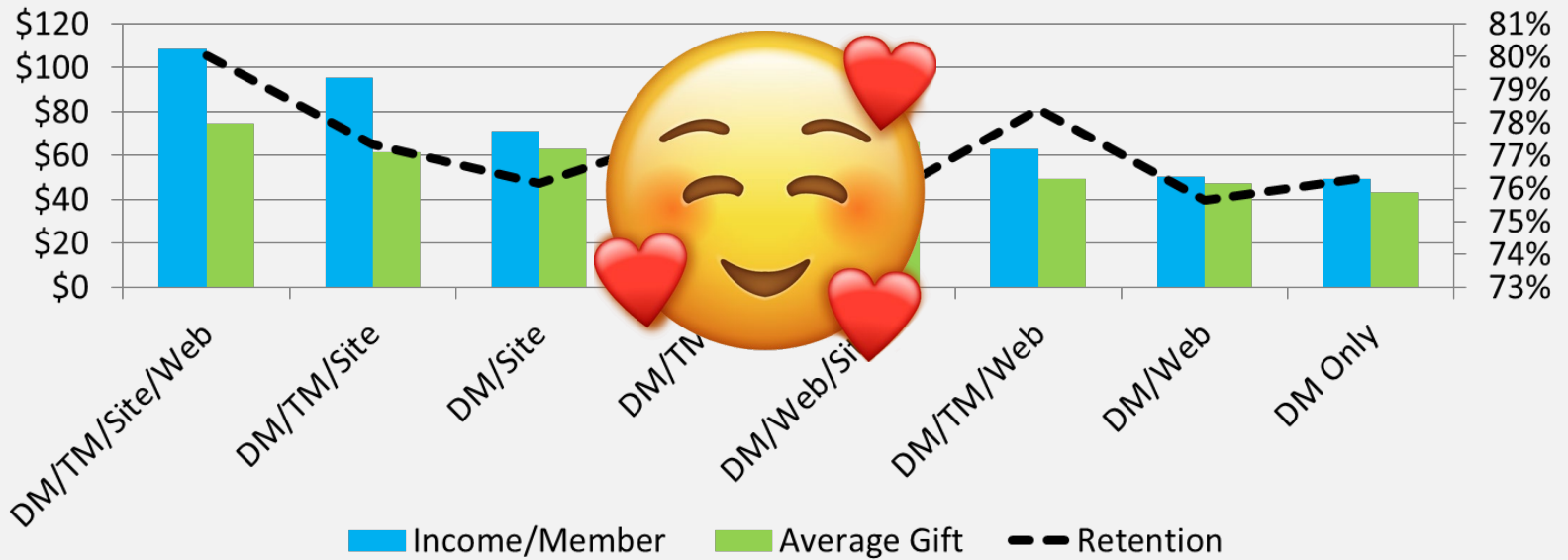
MYTHS AND MISCONCEPTIONS OF TELEMARKETING



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



TM BOOSTS OTHER CHANNELS



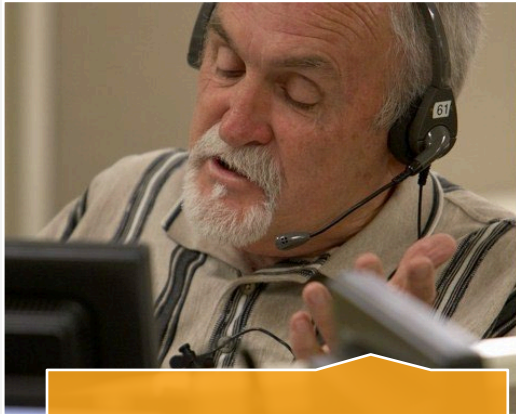
MYTHS AND MISCONCEPTIONS OF TELEMARKETING



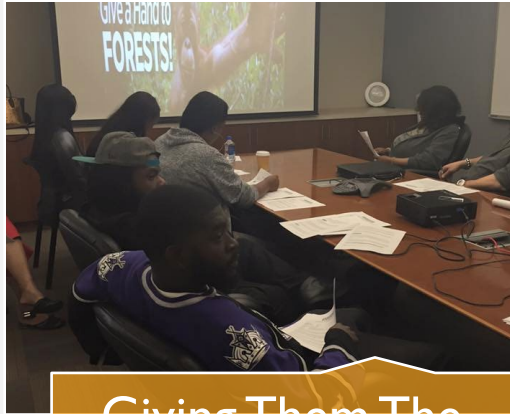
1. Your supporters don't want to be called.
2. No one is calling your supporters
3. Telemarketing poaches funds from Direct Mail and other channels
4. A telefundraising call is no different than a telemarketing call



THE CALL CENTER



The Ideal Caller



Giving Them The
Right Tools



Creating the Best
Team Culture



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?

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

Sustainer	<ul style="list-style-type: none">• New donors to the organization• Recently reactivated donors• Multi-givers
Renewal	<ul style="list-style-type: none">• Month after Expire Date• After the 2nd Renewal Effort
Lapsed Reinstatement	<ul style="list-style-type: none">• Once a year cleanup
Mid-level	<ul style="list-style-type: none">• Concierge Programs• Challenge Match Build• Branded Programs
Cultivation	<ul style="list-style-type: none">• Thank You Calling• Welcome Calling
Planned Giving	<ul style="list-style-type: none">• Survey and education call



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.

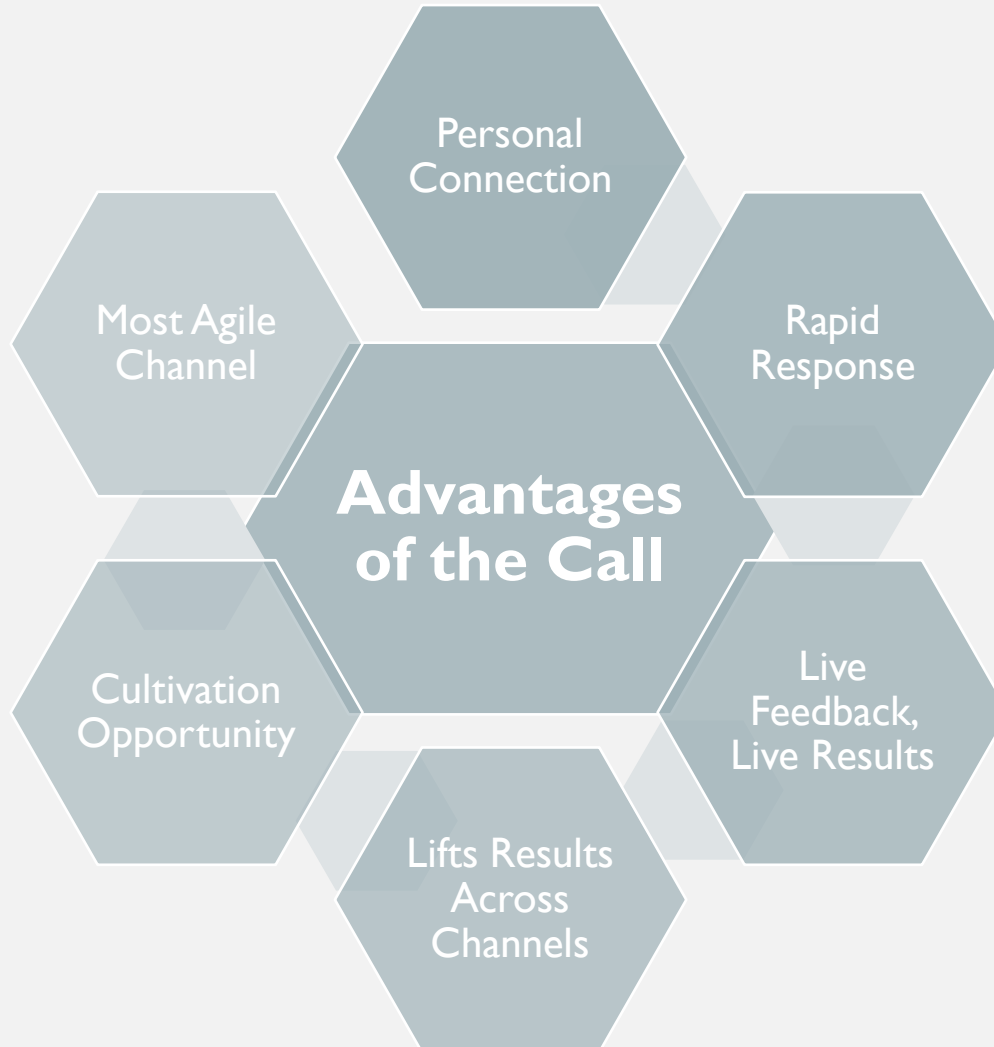
Solicitation notices must be signed by the organization.

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.



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!

Why 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

In the last two years, SMS has become the fastest growing channel for political campaigns and nonprofits.



SMS improves fundraising + communications.

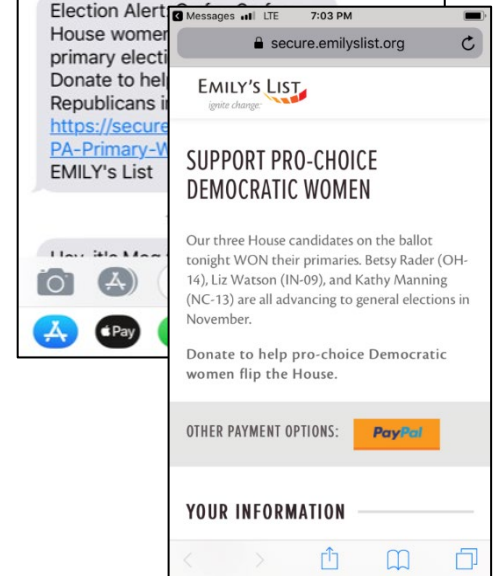
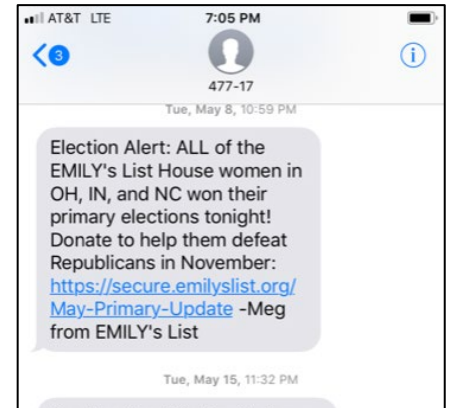
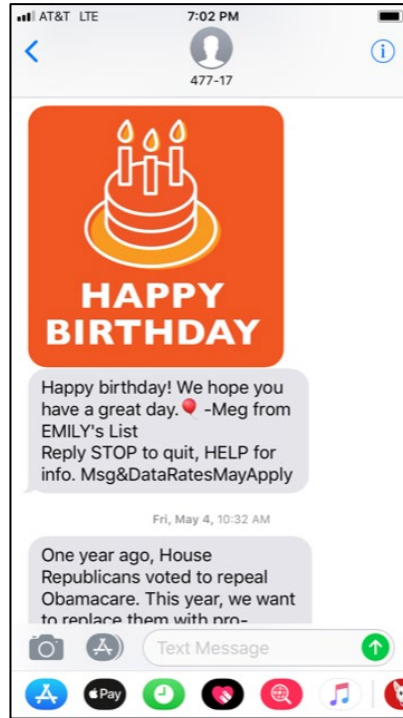
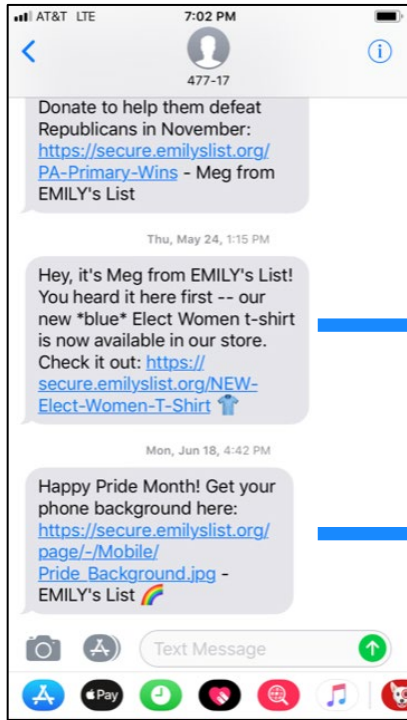
- Increase action rates, click through rates, response rates, and conversion rates.
- Drive more advocacy calls
- Donors receiving texts donate more across all channels
- Increase event attendance and participation.
- Improve email open rates.
- Raise money!

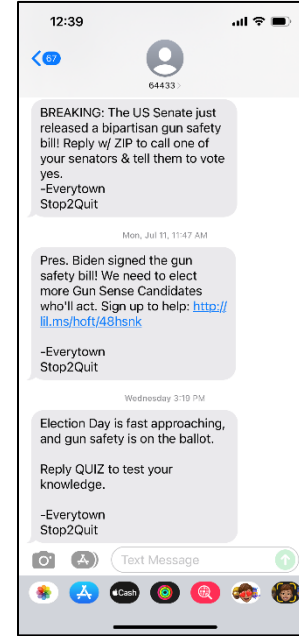
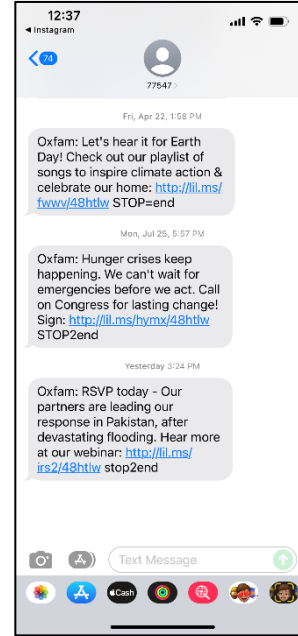
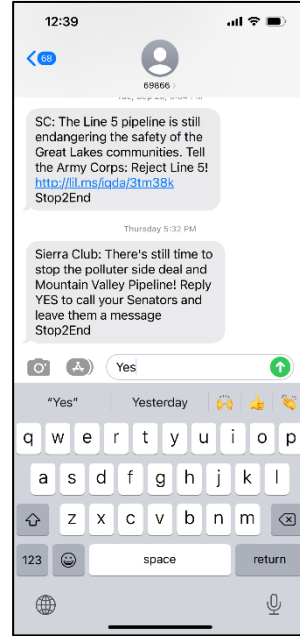
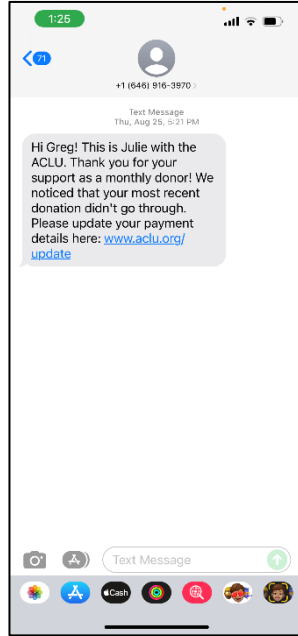
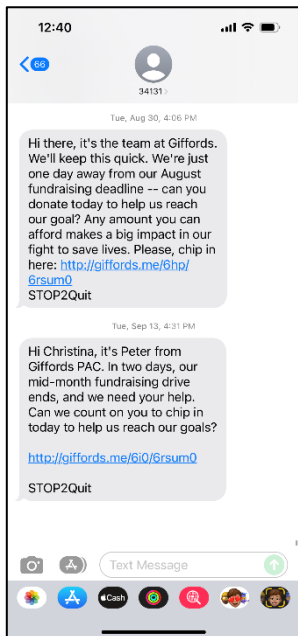
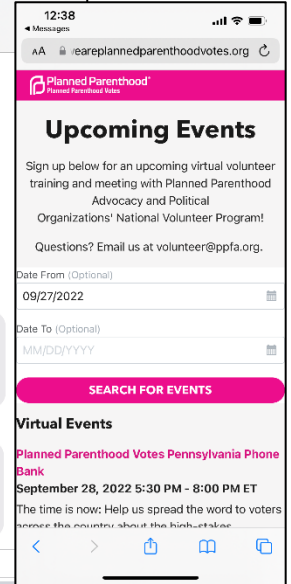
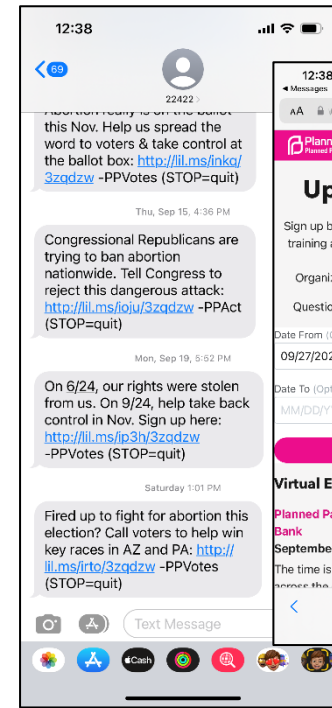
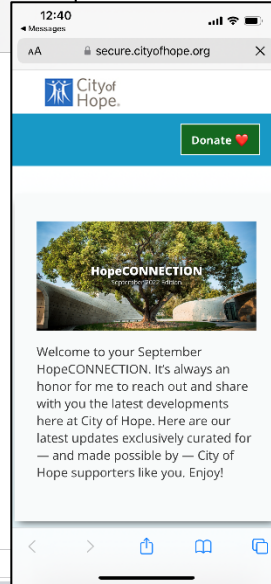
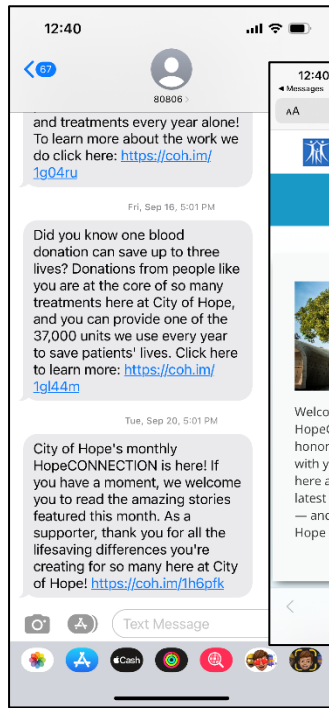
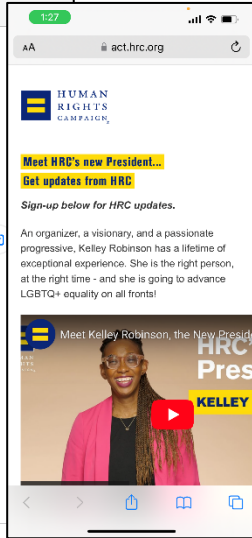
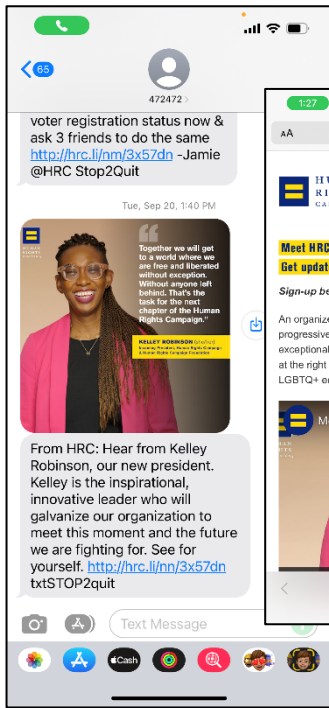


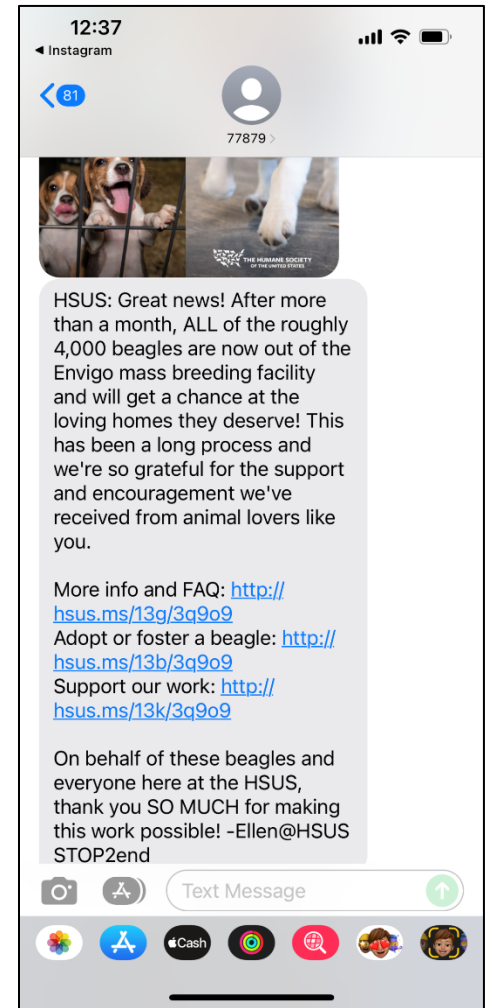
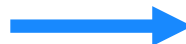
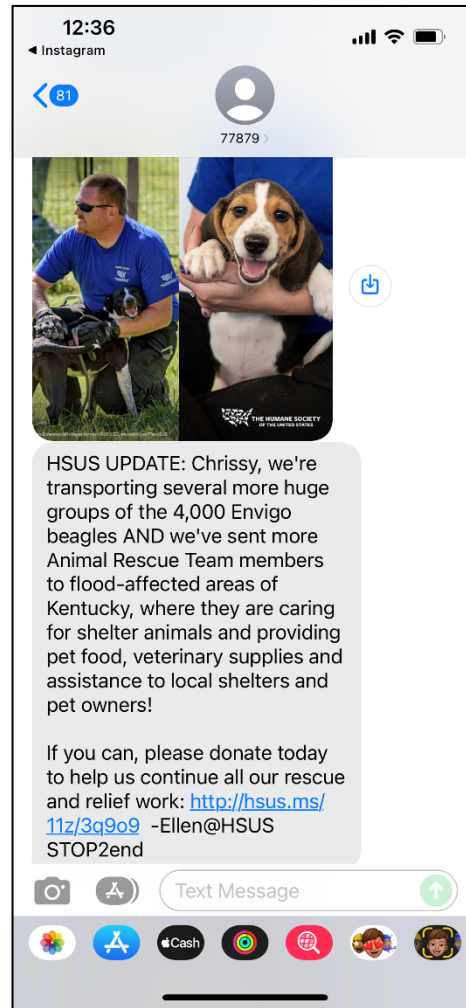
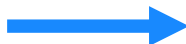
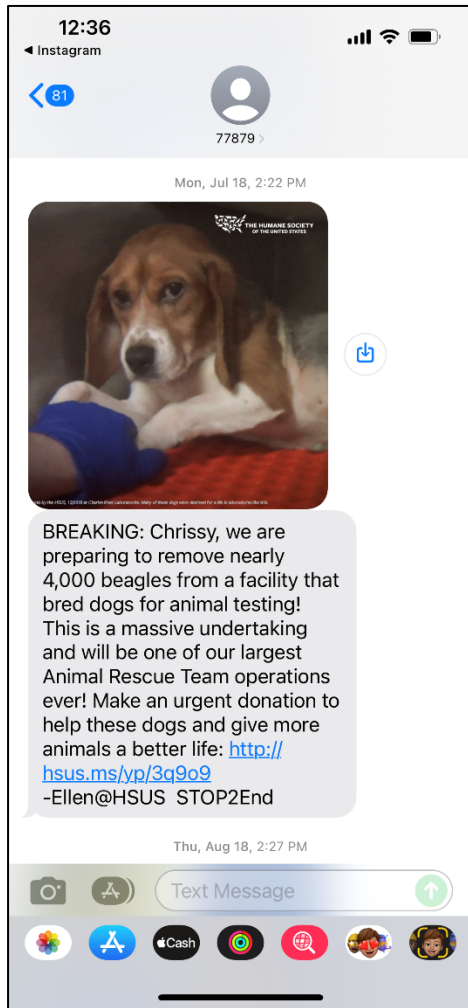
Broadcast

- Also known as shortcode or A2P, this is the most cost-effective way to reach your supporters.
- Broadcast also offers reliable deliverability and long-term security in your program.
- Requires your supporters to opt-in to receive texts, which can be time consuming and expensive.





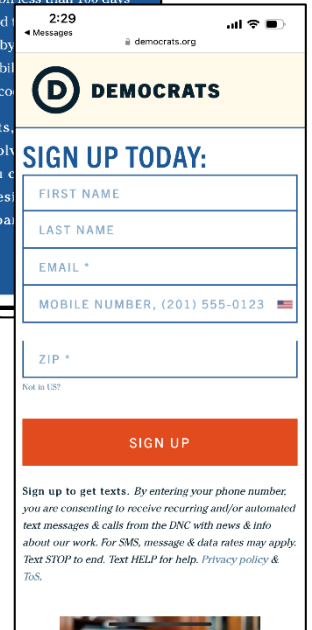
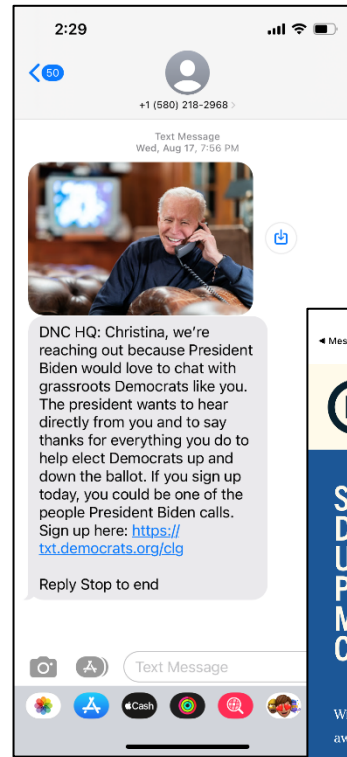
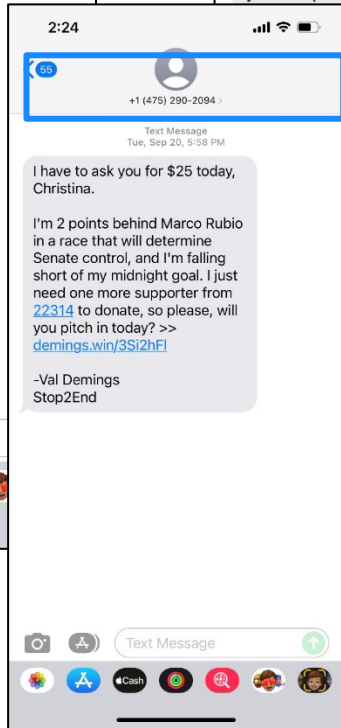
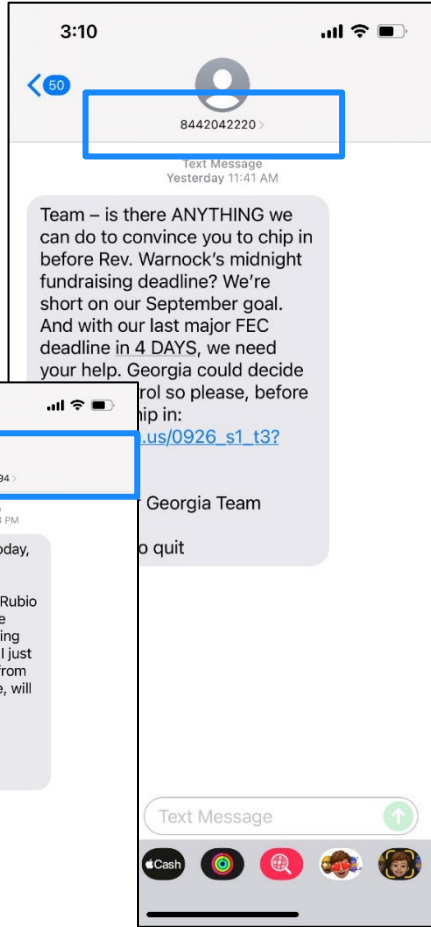
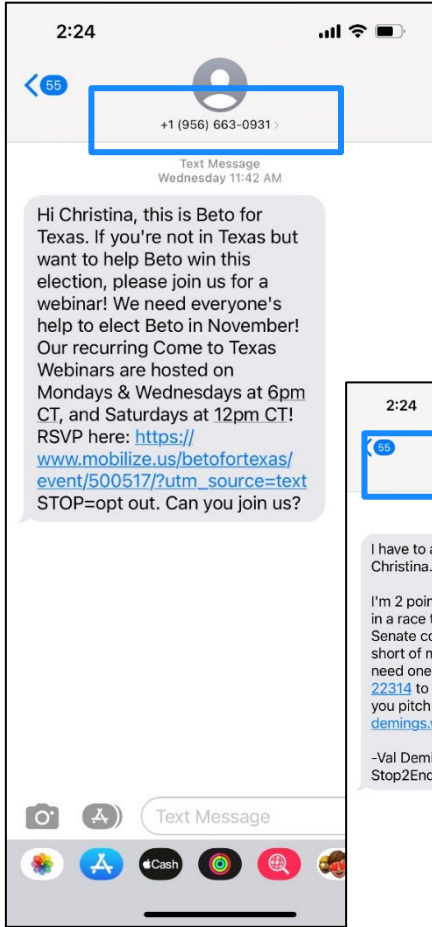




Peer to Peer

- Also known as longcode, this has the benefit of massive scale.
- Text any supporter on your file.
- Drive both immediate revenue and actions
- Generate opt-ins to a shortcode program.
- It's more expensive than shortcode texting.





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

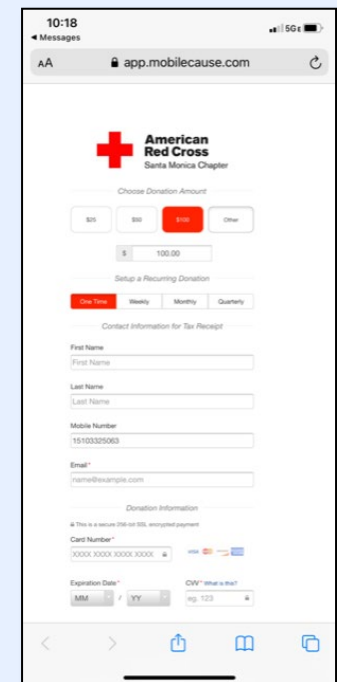
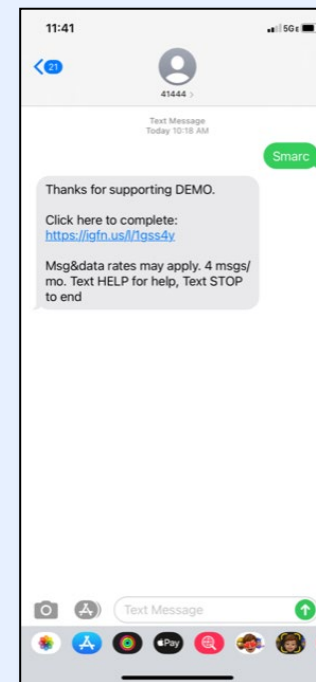
The “New”

Text in a keyword

Directed to a website

Collect all donor info

Available to all orgs



Best Practices to Consider

- Add value for your donors!
- Build trusted partnerships.
- Pay attention to deliverability
- Consider every SMS subchannel
- Test EVERYTHING.
-
- Integrate for the best results.
- Be ready to shift.
- **Collect opt-ins every single place you can.**



Please charge my renewal in the amount of \$_____ to my:

- American Express
- Mastercard
- Visa
- 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/ga/privacy.

Cell Phone:_____

Visa Mastercard AmEx Discover

rd

mail 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://democraticgovernors.org/privacy-policy/>

Paid for by the Democratic Governors Association.

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: **PayPal**

Take secure action with a single click. Log in or Sign up for FastAction!

efaction

SELECT

REQUIRED:

Cell Phone Number:

DONATE

TERMS & CONDITIONS

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

- This contribution is made from my own funds, and not from those of another.
- This contribution is not made from the general treasury funds of a corporation, labor organization or national bank.
- I am not a federal contractor, nor am I a foreign national who lacks permanent resident status in the United States.
- 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.

Seriously. Collect opt-ins EVERYWHERE!

Donor Information

First Name

Last Name

Street Address

City

State

Country

Postal Code

United States

Email

email@email.com

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

email@email.com

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

12:45

staceyabrams



1,146 Posts 2M Followers 234 Following

Stacey Abrams she/her
Candidate for Governor. Author of Our Time is Now, While Justice Sleeps, Lead from the Outside and Stacey's Extraordinary Words. Producer of All In. staceyabrams.com

Followed by joe Biden, amy schumer and 137 others

Following Message Contact



Contact

Text
(404) 737-1022

Email
press@fairfightaction.com

QUESTIONS?



THANK YOU!!



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



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