

Keep them coming back for more.

Renewal Strategies to Improve Retention



 MAY 13, 2021

TEAM INTRODUCTIONS



**DAVE
OLSON**

COO, Agency
Services



**J.C.
BOUVIER**

Senior Director,
Marketing Strategy



**LEANNE
BARKLEY**

Account Manager,
Agency Services

KEY TAKEAWAYS

Whether you are a membership-based organization or have an annual giving program, today you will...

1

Learn about 10 renewal tactics that can be leveraged for your donors.

2

Hear how texting, artificial intelligence, and informed delivery can play a role in improving response and revenue.

3

Gain a refresher on direct mail and email best practices and proven techniques that support renewals.



Poll time.

—

Monthly Anniversary Appeal

ANDERSON UNIVERSITY



316 Boulevard
Anderson, SC 29621

NON-PROFIT ORG
U.S. POSTAGE
PAID
PERMIT #475
34080

Happy Anniversary



Ms. Juanita W. McCartha
232 Crimson Oak Dr
Lexington, SC 29072-8181

316 Boulevard • Anderson, SC 29621



Knowledge For Your Journey



Dear Ms. McCartha,

Gifts like yours of \$100.00 in February of 2017 enabled Anderson University to support all academic programs, provide scholarships and financial aid to deserving students, and enhance the overall student experience in an intentionally Christian environment.

Anderson University continues to deliver an exceptional educational experience because donors like you exhibit your #TrueToAU spirit. Please know how much we value your friendship and support.

On behalf of over 3,500 students, I would like to respectfully ask you to renew your financial support using the enclosed envelope. Your gift will make a difference in the lives of the students we serve. For that, we are deeply grateful.

Respectfully,

J. Wayne Landrith, Class of 1984
Senior Vice President for Development and Presidential Affairs



Thank You For Making A Difference For All Trojans!

Please provide your most current information.

Primary Email: _____ Phone 1: _____ <input type="checkbox"/> cell <input type="checkbox"/> home <input type="checkbox"/> work Phone 2: _____ <input type="checkbox"/> cell <input type="checkbox"/> home <input type="checkbox"/> work Employer: _____ Title: _____	Spouse Email: _____ Phone 1: _____ <input type="checkbox"/> cell <input type="checkbox"/> home Phone 2: _____ <input type="checkbox"/> cell <input type="checkbox"/> home Employer: _____ Title: _____
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My address has changed. My new address is:
Address _____
City _____ State _____ Zip _____



Dear Ms. McCarthy,
Your gift, in any amount, provides current T with exceptional academic and athletic opp and demonstrates your belief in Anderson Thank you for your support.

Ms. Juanita W. McCarthy
232 Crimson Oak Dr
Lexington, SC 29072-8181

2014-274761705
0



Office of Development
316 Boulevard • Anderson, SC 29521
(864) 231-2102

Yes! I want to support Anderson University.

Please accept my gift of: \$50 \$85 \$100 Other \$ _____

Please designate my gift to the following:

- Anderson Fund (Student Scholarships)
- Christian Ministry Foundation
- Parent Association
- Athletics/Trojan Club
- In support of the Anderson University Football Program
- Other _____

Payment Information:

- Online:** Make your gift at www.andersonuniversity.edu/giving/online
- Check:** Make your check payable to Anderson University
- I want to make a one-time gift with my credit card listed below**
- I want to make a monthly gift with my credit card listed below**
Please process gift of _____ on the 15th of each month.

Debit/Credit Card: VISA MasterCard AMEX Discover

Name on card: _____
Signature (required): _____
Card number: _____ Exp. date: _____ CW: _____

Your gift is tax-deductible to the full extent allowed by law.

Your Recent Support	
2/13/2017	\$100.00 Netters Club - Men's Tennis
Your Most Generous Support	
4/8/2014	\$100.00 Volleyball Missions

My gift is In Honor of In Memory of _____

- I wish this gift to be anonymous
- I plan to include Anderson University in my will or estate plans.
- I have already included Anderson University in my will or estate plans.

GO TROJANS! Make your gift online today at www.andersonuniversity.edu/giving/online

Happy Anniversary, Dave!

Anderson University, anderson@andersonuniversity.edu
To: Dave Durr



Thank You For Making A Difference For All Trojans!

Dear Dave,

Gifts like yours of \$20 in February of last year enabled Anderson University to support all academic programs, provide scholarships and financial aid to deserving students, and enhance the overall student experience in an intentionally Christian environment.

Anderson University continues to deliver an exceptional educational experience because classes like you enable your future! All apart. Please know how much we value your friendship and support.

On behalf of over 3,000 students, I would like to respectfully ask you to renew your financial support for Anderson University. Your gift will make a difference in the lives of the students we serve. For that, we are deeply grateful.

Respectfully,

J. Wayne Lambeth

J. Wayne Lambeth, Class of 1988
Senior Vice President for Development and Presidential Affairs

Your Recent Support	
February 1, 2017	\$25 Anderson Fund
Your Most Generous Support	
February 1, 2017	\$50 Parents Fund

Renew Your Gift Today!

It's so easy to give and we assure you that your gift will make a difference in the lives of the students we serve.

Thank You
The Office of Development is pleased to provide this help. We are a member of the United Way and are proud to be a part of the community. Because of you, we can provide that help. We are proud to be a part of the community. We are proud to be a part of the community. We are proud to be a part of the community.

Contact Us
100 Boulevard
Anderson, SC 29521
Phone: 864.231.2102
Email: anderson@andersonuniversity.edu

USPS INFORMED DELIVERY



What is Informed Delivery?



Informed Delivery users receive **scanned images of the exterior** of incoming letter-sized mailpieces (processed through automated equipment).

Images are available via **email notification, online dashboard, or mobile app.**

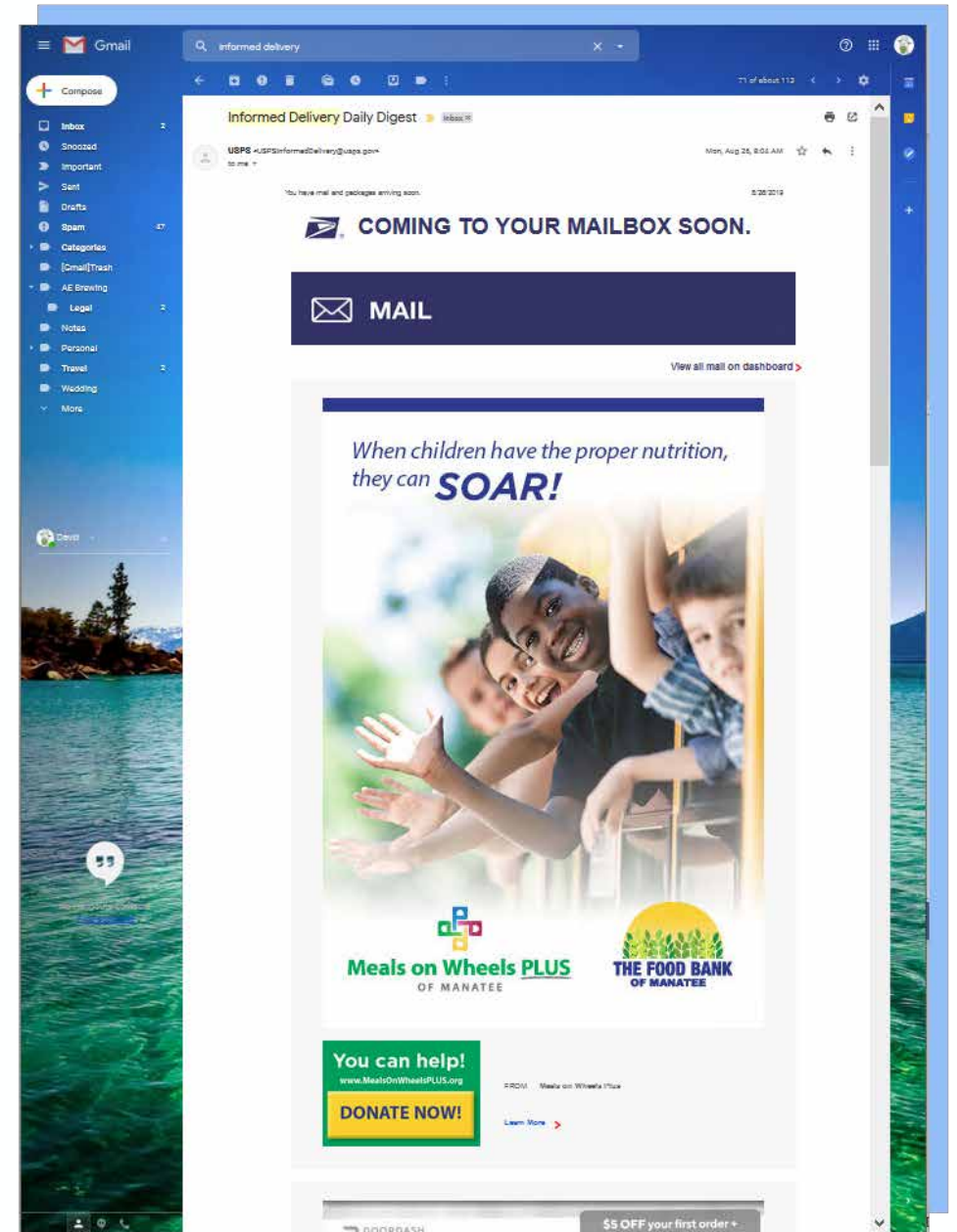


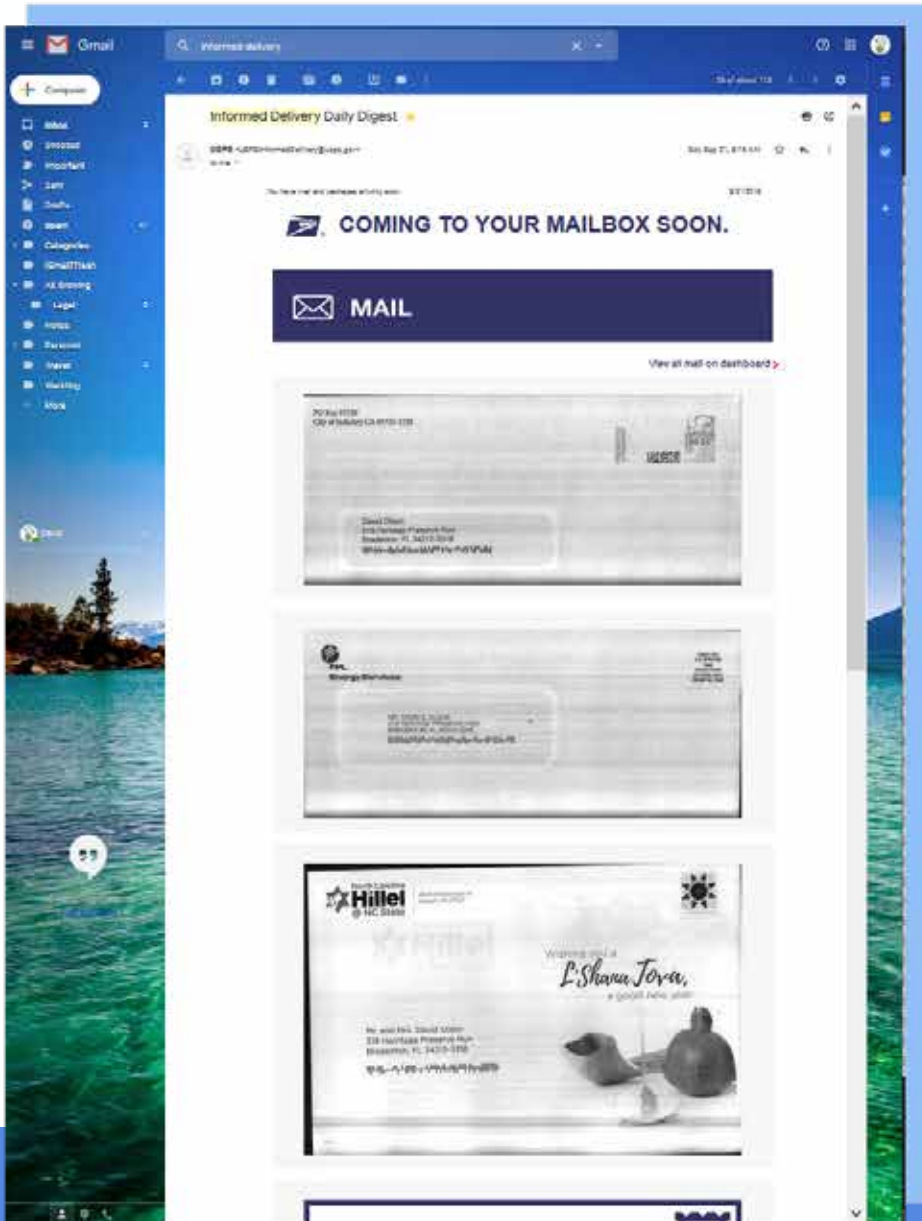
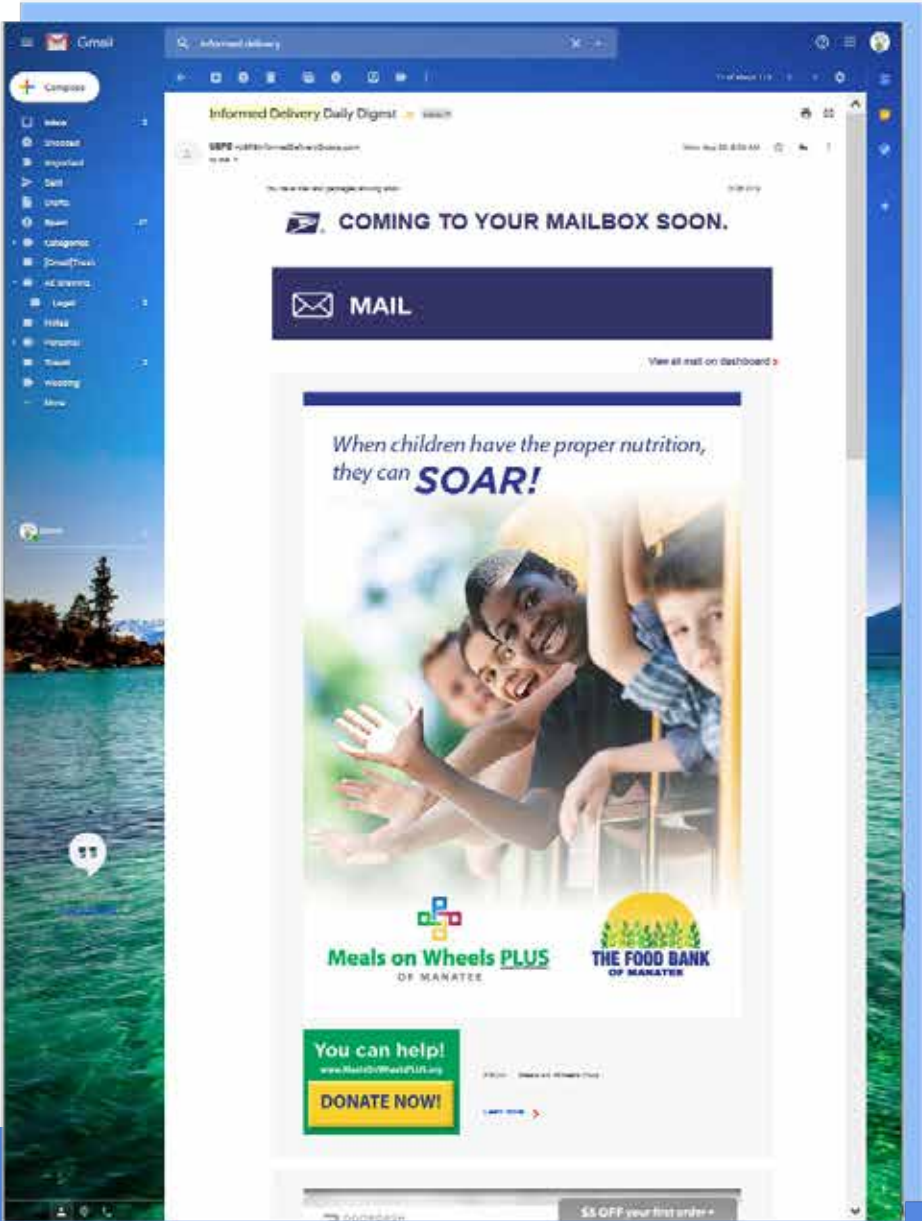
If a mailer participates in Informed Delivery, **supplemental content, referred to as “interactive campaigns,”** will be shown (for Letters or Flats).

Interactive campaigns include **custom images and a URL** that directs the user to a digital experience.



ALLEGIANCE GROUP





Ringless Voice Messaging

WHY MAKE HUNDREDS OF CALLS?
JUST MAKE ONE.

Non Intrusive way to reach your audience

1

No direct phone call is ever made to a subscriber.

2

A connection to a VM server is made to drop a desired message.



4 Reasons why Ringless
Voicemail Drops are
a great way to
reach out to
prospects

3

The phone never rings!
Thus a network
does not
carry an
active call.

4

The FCC does
NOT regulate
such enhanced
information
services.

Route thousands of your
own custom voice messages
without ever ringing their line!

DIRECT MAIL NEWSLETTERS



DOUBLE BUCKSLIP ALLOWS FOR RENEWAL REMINDER

Test

Control

01007916081TMR01100220100SH0C000006000000009000

I want to help APT continue great programming!

I want to support my favorite programs on APT. Enclosed is my gift of:

\$XX \$XX \$XXX Other \$_____

I would like to make a Monthly Sustaining Membership Gift of \$_____ per month. (Renews until you tell us to stop).

My check is enclosed, payable to APT.

Please charge my: AMEX VISA MasterCard

9999999999 ///////////////
Mr. John Q. Sample
Allegiance Fundraising
36 Cordage Park Circle, Suite 225
Plymouth, MA 02360-7320

Account Number _____
Expiration Date _____
Signature _____
Email required for Passport _____

ALABAMA PUBLIC TELEVISION
apt PBS
2112 11th Avenue South #400 • Birmingham, AL 35205-2884 • www.aptv.org



Dear Mr. Sample,

Thank you for our support of Alabama Public Television! Is it time to renew your membership? If so, please renew today so that you may continue to receive your member benefits including *Member News* which I have enclosed for you today.

With a gift of just \$10 a month, or \$120 annually, you will have access to the APT monthly *Viewer Guide*, the MemberCard app, *Member News*, and Passport access to our video library offering on-demand viewing of some of your old favorites and some new programs featured in this newsletter.

Please send your gift or renew today online at www.aptv.org so that we can make sure you receive the next edition of *Member News* to keep you up-to-date on the newest program offerings and other APT news.

Sincerely,
Philip F. Hutcheson
Philip F. Hutcheson
Interim Executive Director and Fellow Member

Membership Status: Renewal Due
Your membership expires on: EXPDATE

01007916081TMR01100220100SH0C000006000000009000

I want to help APT continue great programming!

I want to support my favorite programs on APT. Enclosed is my gift of:

\$XX \$XX \$XXX Other \$_____

I would like to make a Monthly Sustaining Membership Gift of \$_____ per month. (Renews until you tell us to stop).

My check is enclosed, payable to APT.

Please charge my: AMEX VISA MasterCard

9999999999 ///////////////
Mr. John Q. Sample
Allegiance Fundraising
36 Cordage Park Circle, Suite 225
Plymouth, MA 02360-7320

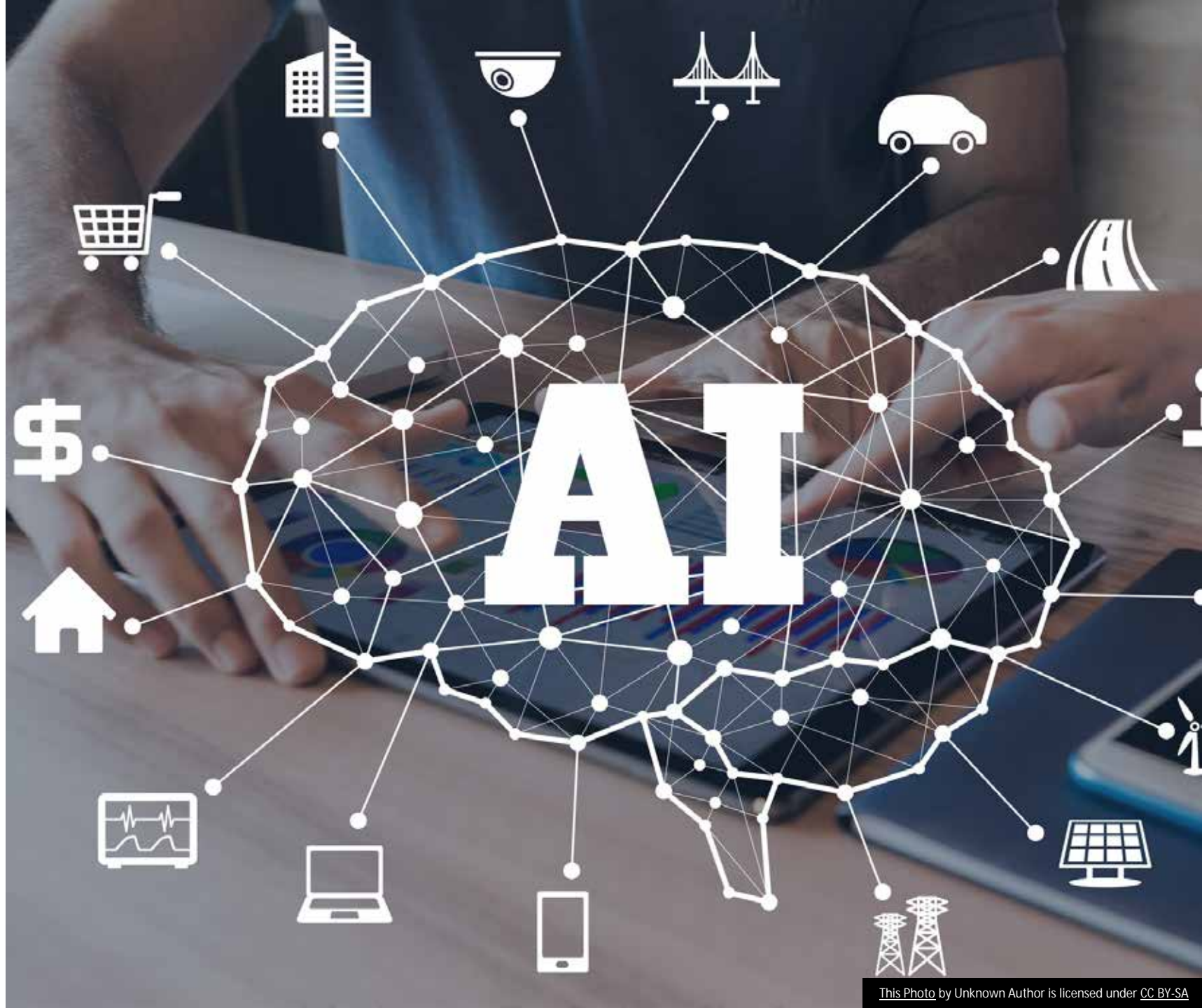
Account Number _____
Expiration Date _____
Signature _____
Email required for Passport _____

ALABAMA PUBLIC TELEVISION
apt PBS
2112 11th Avenue South #400 • Birmingham, AL 35205-2884 • www.aptv.org

The test group saw TWICE as many responses compared to the control.

ARTIFICIAL INTELLIGENCE

Using predictive models to deliver individually optimized gift arrays.



ARJUNA'S EXACTASK DELIVERS CUSTOM ASK STRINGS

- ExactAsk uses behavioral insights and current market conditions to determine ask strings.
- The result increases renewal revenue without suppressing response.
- This AI helps upgrade donors who have been stagnant in their giving.
- Dynamic asks adjust and optimize for every appeal as the AI continues to learn.

18%

GROSS REVENUE
INCREASE IN YEAR 1

\$3

IMPROVEMENT FOR
EVERY \$1 INVESTED

A/B

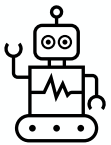
TESTING ALLOWS FOR
ONGOING MACHINE
LEARNING IN YEAR 1



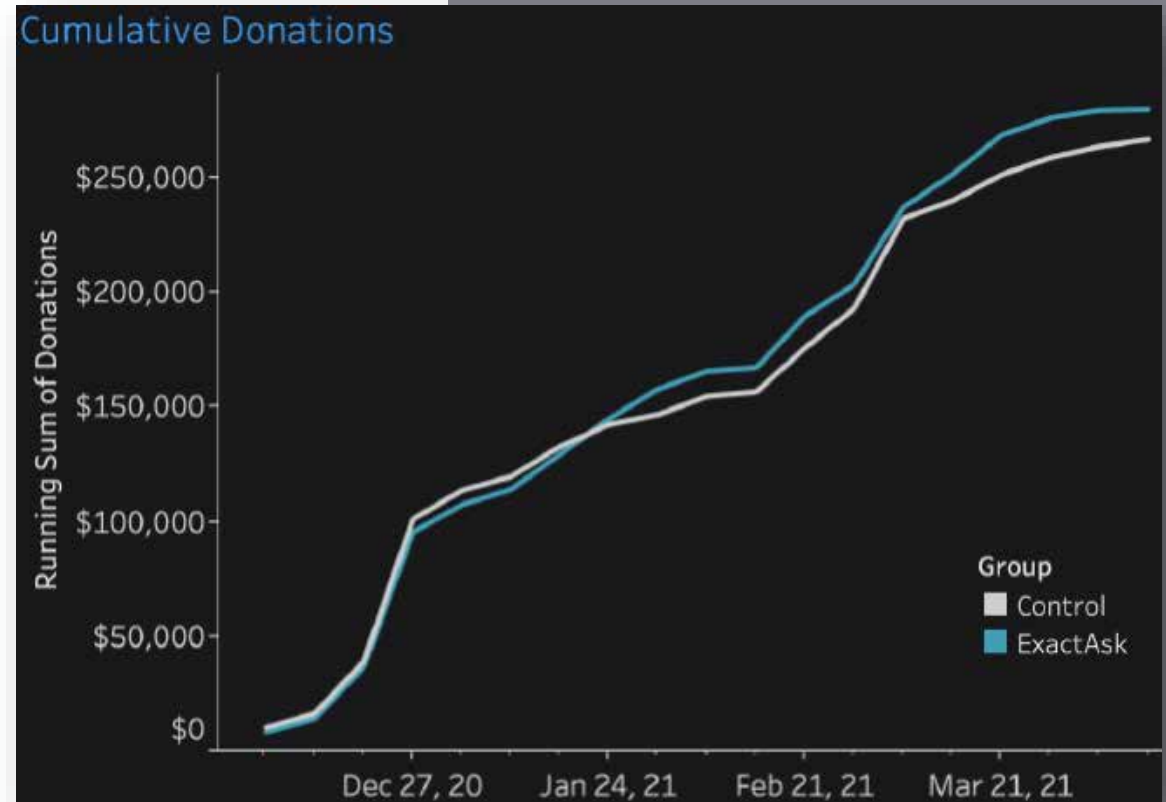
5% REVENUE LIFT; 293% ROI

after Baseline Discovery Period

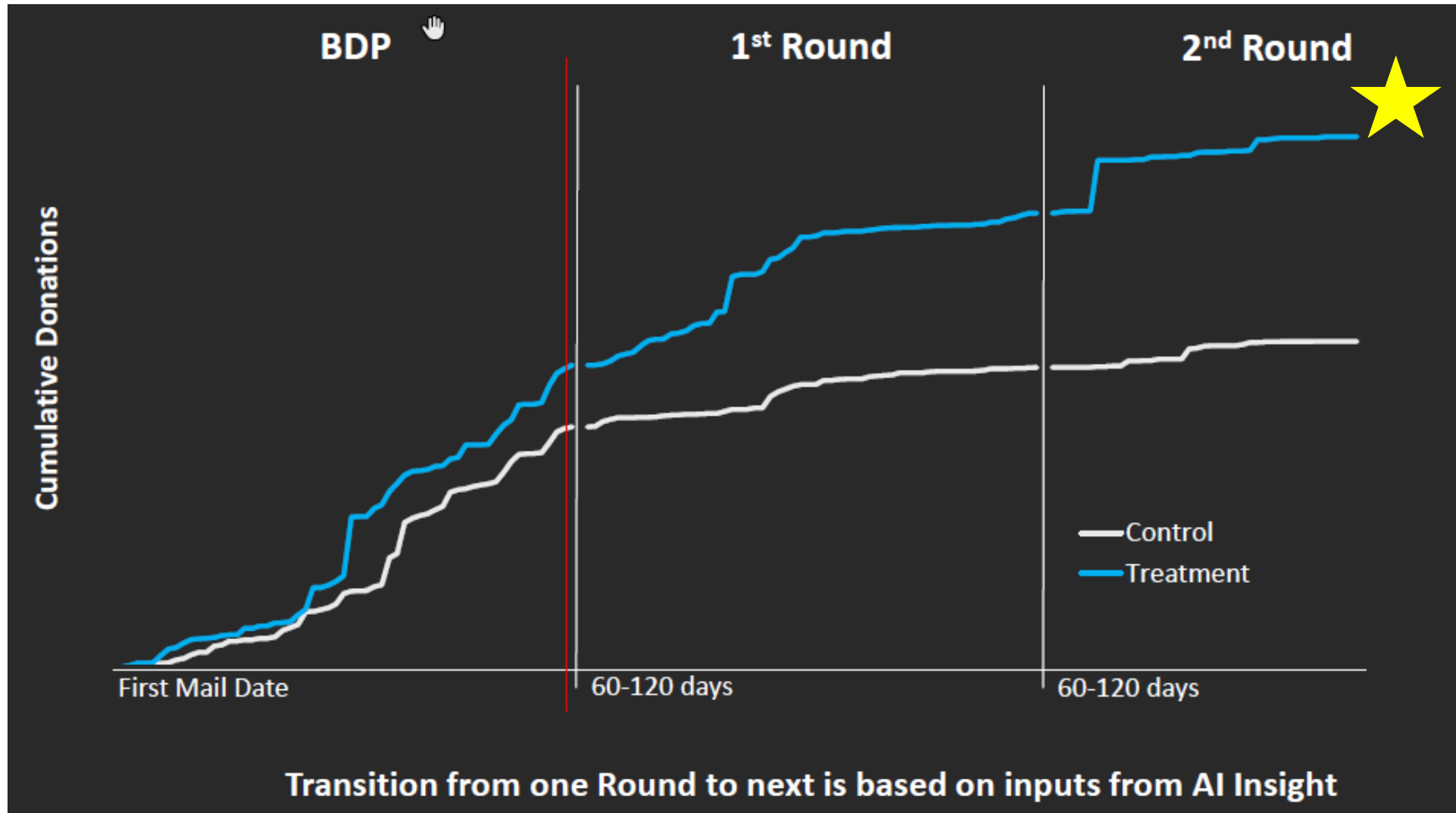
- In the early stages of learning, one Allegiance client has seen:
 - 5% revenue increase for the ExactAsk audience.
 - 10.5% increase in the average gift.
 - Even response between control and test groups.



This client has just recently entered the next round of learning...



THE POTENTIAL IS GREAT.





SMS TEXTING

- **Half** of all nonprofit website visitors came from users on mobile devices in 2020.
- 35% of online gifts were made from a mobile device in 2020.
- 90% of text messages are read within 3 minutes.
- Mobile fundraising **click-through rates averaged 6.3%** in 2020 – much better compared to the 1.7% average click-through rate for email.

ALABAMA PUBLIC TELEVISION

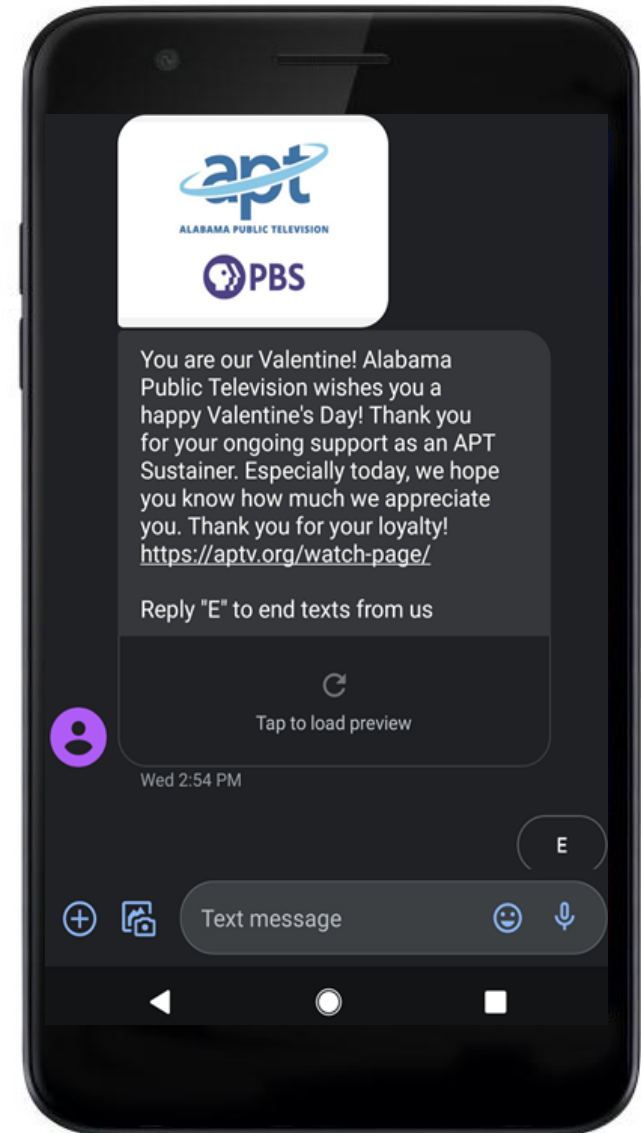


Statewide network with a membership program.

Offers television programs that educate, inform, and inspire.


MARCH 2021 TEXTING CAMPAIGN SEES A 130% ROI

- Used an outbound SMS strategy to support APT's spring on-air fundraising drive.
- Campaign included renewal-cycle donors, among other segments.
- Started with a pre-campaign stewardship message to prime donors for an ask.
- 5% opt-out rate (vs. 6.7% benchmark)



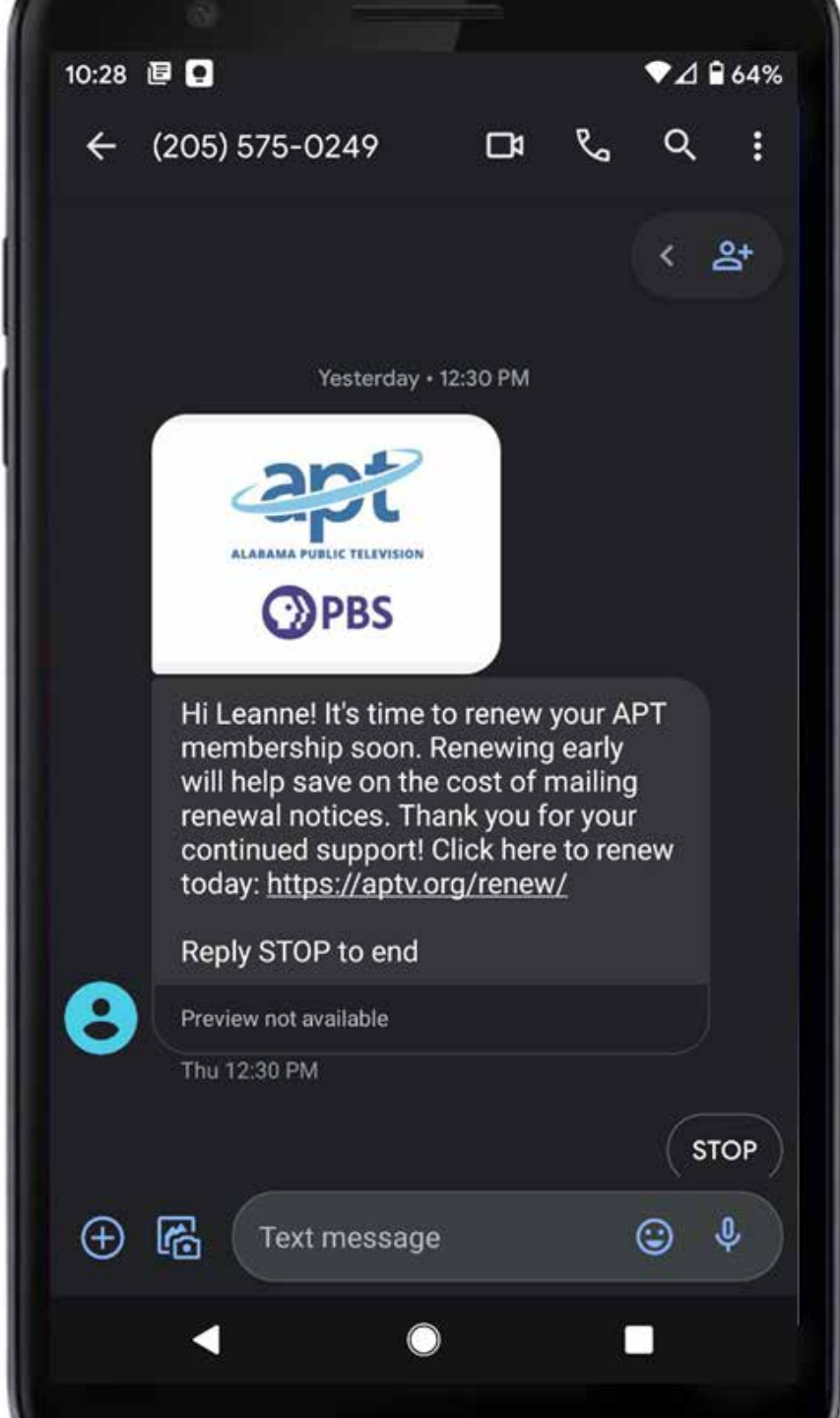
FUNDRAISING MESSAGES SAW A 2.5% RESPONSE RATE

- Sent a fundraising text in last days of the drive as to allow other channels to work as normal.
- By this time, email and direct mail notices would have already been received (with no response).

 We saw a 2.5% response rate and \$108 average gift for renewal donors.

 14% of contributions were sustainer conversion gifts.





ALABAMA PUBLIC
TELEVISION

Monthly Renewal Reminders

- Consider testing reminders at various points in the donor journey/membership cycle.
- APT saw a 6.70% response rate in effort 1 (month 9) of its membership renewal series.
- Effort 4 (13 months since last gift) showed a 3% response rate.



E-Renewal Notices

START BEFORE YOUR MAIL DROPS



PRE-RENEWAL EMAILS

- Emails deploy **prior** to the mail membership renewal series
- Pre-renewal membership email can **reduce** org's mail costs
- **Donor impact:** more of their support will go directly to your org's mission
- **Remind** members of their benefits: program guides, content access



[Renew Now](#)



Dear %%FirstName%%,

We've been working hard preparing a series of renewal letters that soon will be arriving in mailboxes all over South Dakota. But I'd rather not send one to you.

There's no better time than now to renew. You can save us the expense of printing and sending you those letters. (It will also save some paper, and I bet you think that's another good thing.)

[Renew Now](#)

Remember, with a gift of \$40 or more, you'll receive our monthly *SDPB Magazine* with TV listings and show descriptions, radio program information, and more. A gift of \$60 or more qualifies you for the SDPB Passport benefit, providing you with extended on-demand access to a rich library of quality public television programming.

[Renew Now](#)

You'll help keep SDPB as a strong, independent voice, available to all viewers and listeners free of charge. And a gift right now means we save a little on our next big mailing, making your donation go even further.

Thank you,

MIDNIGHT E-RENEWALS

- Deploys the final day as the donor's membership **expires**
- Creates **urgency** "Time's nearly up" messaging
- **Personalize** your subject lines, driving interest and open rates
- **25% of e-renewal revenue on average has been generated from midnight renewals**

**DON'T WAIT —
TIME'S NEARLY UP**



Dear Friend of KING FM,

Did you realize that your KING FM membership expires at midnight?

Maybe it was an oversight, or maybe my emails didn't make it through. Sorry about that.

The good news is there's still time to keep your membership current.

[Renew Now](#)

I'm so thankful for your support. It helps keep us going. It's an inspiration to us and it allows us to keep providing you with the calming and inspiring music you have come to expect from KING FM — especially during unprecedented times.

But we can't keep providing exceptional classical music programs if we don't have support from our members.

SUBJECT LINES MAKE A DIFFERENCE

Effort 3 Subject Line	Open Rate	Click-through Rate
Massachusetts is stronger with WAGR	18%	1.43%
NEW: [Your WAGR membership expires] this month	19%	4.22%

Effort 4 Subject Line	Open Rate	Click-through Rate
There's still time to renew your WAGR membership	16%	2.37%
NEW: [Your membership has expired,] renew quickly right now	20%	5.42%

Non-membership retention focused subject line examples:

- *J.C., your last gift? 2019.*
- *Will you give again Leanne?*
- *Dave, one beer is all it costs...*



Donor Engagement

RETENTION IS A JOURNEY, NOT A DESTINATION



ENGAGEMENT

- Campaign **stewardship** – *emails with soft or no ask* -- help keep your supporters feeling appreciated.
- Stewardship emails should speak directly to the **impact** that their gift has on your organization.
- Stewardship helps donors understand the **value** they gain by supporting your org when they renew/give.



Dear Ashlee,

Bring it on!

We have big plans for 2021, in a world that seems to be constantly changing.

So many listeners tell me that they're grateful to KING FM for keeping the music playing and doing all we can to preserve this music as a living art.

I want you to know that we appreciate your belief in our mission. In the new year, you can count on us to continue to bring you the richness of classical music.

Loud and clear, from us to you... thank you for listening!

Brenda Barnes
CEO and Fellow Supporter

CAMPAIGNS + ENGAGEMENT

- Every effort is an **opportunity** – Retention messaging should (ideally) live in everything + the renewal series.
- **Seasonal + regional efforts**
 - Example: public media 'pledge' + organization 'Giving Days'
- **Year-end campaigns**
 - *Obvious*: incentives to donate like premiums or other soft benefits
 - *Bigger lift*: Stories about people benefiting from delivery of your org's mission

THE FREE
LIBRARY
FUND

Donate Now



%%FirstName%%,

I am so happy to introduce you to Nishat, an incredible community member and youth leader. Nishat is going to share her story with us today.

Nishat's family moved to Philadelphia when she was in elementary school. She felt lonely because she didn't know anyone in her neighborhood, but the **Free Library's Literacy Enrichment Afterschool Program (LEAP)** helped her find new friends.

"I started going to the **Blanche A. Nixon/Cobbs Creek Library** because my older cousin, Sam, worked there as a Teen Leadership Assistant (TLA)," said Nishat. "I often found myself visiting the library after school to do homework, check out books, and talk to the TLAs who worked there at the time.

I grew really close to the library staff because they would see me almost every day and ask me about all the books I was checking out.

MISSION DELIVERY STORIES - SUPPORTING RENEWAL

- **Stories about those you serve** keep donors engaged all year long; when renewal time comes, the donor is **invested + primed** to give again.
- **Need** stories about individuals benefiting from your organizations' mission?

We have a few tips for you!

- Ask for stories, experiences or testimonials in surveys
- Use comments you receive on Facebook/Instagram posts
- Feedback from those who contact your organization directly
- Gather stories in audior or video during virtual or live events



THANK YOU

Join us for our next webinar!

**Donor Retention: Now that you
have them, why not keep them?**

July 15, 2021 @ 2 p.m. EST

Questions? Contact us at:

sales@teamallegiance.com
844-858-7654