



# Social Media Discovery Targeting

## Tool

This tool details how an institution used social media engagement to prioritize prospects for qualification visits. For more information on this topic, refer to the New Frontiers in Pipeline Development study.

# Social Media Discovery Targeting

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## Elevate the Discovery Visit Hit Rate

### **Practice in Brief**

Prospects with high levels of engagement with the university on social media are prioritized for qualification visits. MGOs direct cold calling to these individuals, even if they have not engaged with the university through other, more traditional programming, such as events or volunteering. Digital tools assist with collecting social media data.

### **Problems Addressed**

MGOs grow frustrated with low conversion rates on cold calls to prospects who appear otherwise engaged with the institution. Despite a high internal affinity score, few prospects prove willing to meet with fundraisers.

### **Institution Profiled**

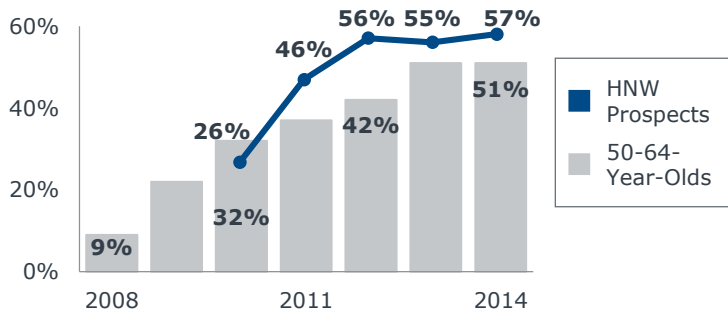
Oregon State University

# A Wealth of Untapped Affinity Data

## Social Media Offers a Promising, and Untapped, Frontier in Prospecting

### Major Gift Prospects Turn to Social Media

High-Net-Worth Prospects and Older Adults Using Social Media



### Finding Fans on Facebook

“If you’re on the university’s page liking, commenting, and sharing posts, wouldn’t it make sense that you’re a fan? **It’s not rocket science.** But there aren’t many schools right now using social media engagement data to figure out who to reach out to.”

Mark Koenig  
Assistant Vice President for  
Advancement Services  
Oregon State University

### Social Media Key in Philanthropic Decisions

**46%** Of wealthy donors consult social media when making philanthropic decisions

**80%** Of donors follow at least one nonprofit on social media

While sophisticated predictive models can offer much insight into discovery prospects’ likelihood of taking a visit, a more obvious, immediate, and easy-to-access indicator is going overlooked by most advancement professionals: social media engagement data.

High-net-worth prospects and older individuals have rushed to embrace social media in recent years. They use it not just to connect with family and friends but also to engage with nonprofits and make philanthropic decisions.

For many prospects, a like, comment, or retweet may signal a deeper willingness to engage with a college or university. Yet few institutions strategically mine social media engagement data to find their next big donor.

Sources: Frank R, “Millionaires Prefer Facebook,” *CNBC*, 2014, <http://www.cnbc.com/2014/07/18/millionaires-prefer-facebook-over-twitter.html>; Spectrem Group, “Social Media Usage,” <http://spectrem.com/Content/Social-Media-Usage-Among-Wealthy-Investors.aspx>; Frank R, “Millionaires Pile into Facebook,” *CNBC*, 2011, <https://blogs.wsj.com/wealth/2011/08/17/millionaires-pile-into-facebook-drop-twitter/>; Spectrem Group, “Facebook Usage,” <http://www.marketwired.com/press-release/millionaires-use-of-facebook-has-nearly-doubled-since-last-year-1550031.htm>; US Trust Study, “High Net Worth Philanthropy,” 2016, [http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp\\_ARMCGDN7\\_oct\\_2017.pdf](http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp_ARMCGDN7_oct_2017.pdf); Burk Donor Survey, 2016; Advancement Forum interviews and analysis.

- 1) “High-net-worth prospect” is defined as a person with \$1M-\$5M in net assets excluding primary residence.
- 2) High-net-worth prospect data indicates Facebook use; 50- to 64-year-old data indicates all social media use.

# Online Engagement as a Discovery Proxy

## Prospects Engaged Exclusively on Social Media Slipped into Discovery Pools

### Oregon State University MGOs Include New Group in Discovery Outreach



#### "Control Group" Prospects

- High score in OSU affinity model
- **No social media engagement**



#### Experimental Prospects

- No engagement score in OSU affinity model
- **High level of social media engagement**

### Evertrue Filters Surface Socially Engaged Prospects

The screenshot shows the Evertrue filters interface with the following components:

- Filters Header:** "Rated? AND Major Market AND InDiscovery AND 1 more..." with a count of "1,973 constituents".
- Filter List:**
  - Rated?** (dropdown menu)
  - Major Market** (dropdown menu) with a value of "Tier 1 Portland Metro".
  - InDiscovery** (dropdown menu)
  - Engaged on Facebook?** (dropdown menu)
- Logic Connectors:** "AND" and "OR" buttons are used to combine filters.
- Prospecting Criteria (Right Side):**
  - \$25K+ Capacity:** Indicated by a blue dot on the "Rated?" filter.
  - Portland-based:** Indicated by a blue dot on the "Major Market" filter.
  - In Discovery:** Indicated by a blue dot on the "InDiscovery" filter.
  - Social Score: 5:** Indicated by a blue dot on the "Engaged on Facebook?" filter.

Oregon State University bucked the trend by using the social media engagement trends of high-net-worth prospects to target discovery outreach.

To evaluate whether a broader rollout was worthwhile, the team at Oregon State conducted a test. They gave a group of MGOs a small pool of discovery prospects and asked them to book visits with them.

Unbeknownst to the MGOs, the pools were composed of two different types of prospects. The first group (the "control group") had a high affinity rating per Oregon State's internal model but had not engaged with Oregon State on social media at all. The second group (the "experimental prospects") had no affinity per Oregon State's model but were highly engaged on social media.

Advancement leaders at Oregon State hoped to test whether social media engagement might matter more for prospects' willingness to take a discovery visit than the traditional measures of engagement.

# Giving MGOs Easy Wins

## Targeting Digitally Engaged Prospects Yields Surprising Visit Rate

### “Control Group” Prospects

**24%** Discovery visit rate

### Experimental Prospects

**44%** Discovery visit rate

### Impact by the Numbers

**20%** Improvement in discovery visit rate



### Leaving a Positive Impression on MGOs

“We went and talked to the development officers after this. They said they were honestly **surprised by how willing to take their call** these prospects were.”

*Mark Koenig  
Assistant Vice President for  
Advancement Services  
Oregon State University*

Social media engagement ultimately counted for a lot when it came to prospects’ willingness to say “yes” to an MGO’s cold call.

Advancement leaders at Oregon State compared the discovery visit “hit rate” for each of the two groups of prospects. They found that prospects who were engaged with Oregon State on social media had a 20-percentage-point better hit rate than the more traditionally engaged prospects.

The ease with which MGOs booked visits with digitally engaged prospects began to change the MGOs’ attitudes about cold calling. Whereas cold calling had yielded discouraging results in the past—and thus was easy to deprioritize—MGOs were happily surprised to find that cold calls under the new model were a worthwhile activity bringing great results.