



The Distracted Constituent

Part II of Preparing for Advancement's Digital Future

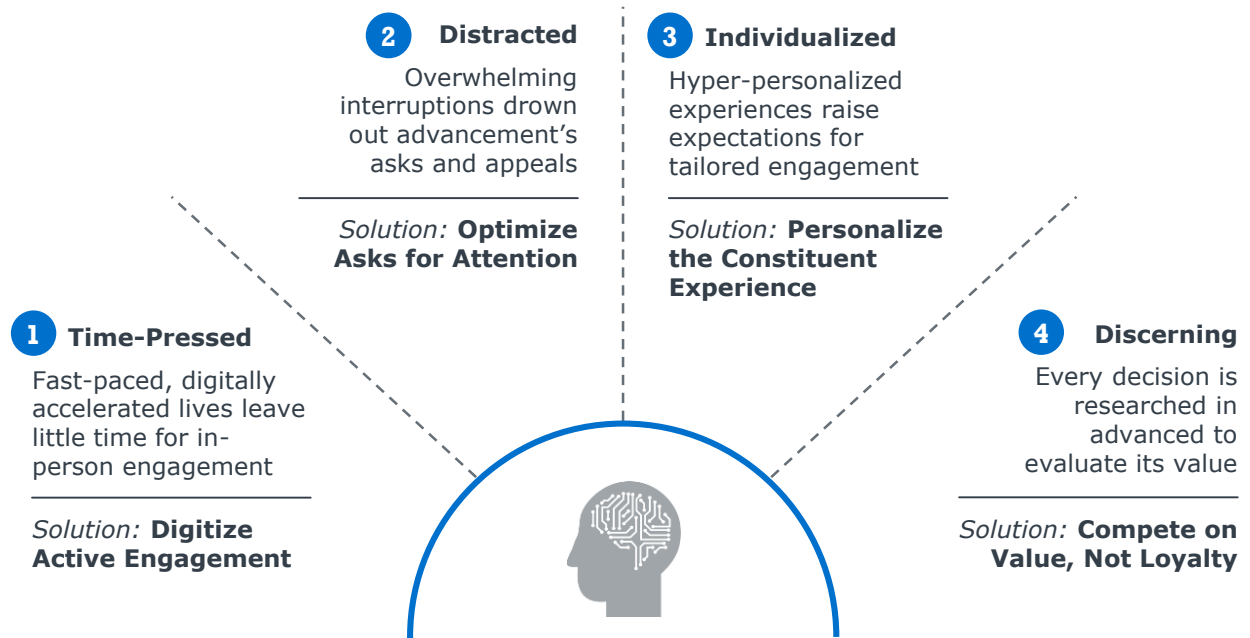
Advancement Forum



Preparing for Advancement's Digital Future

Lessons from the Leading Edge of Marketing and Engagement

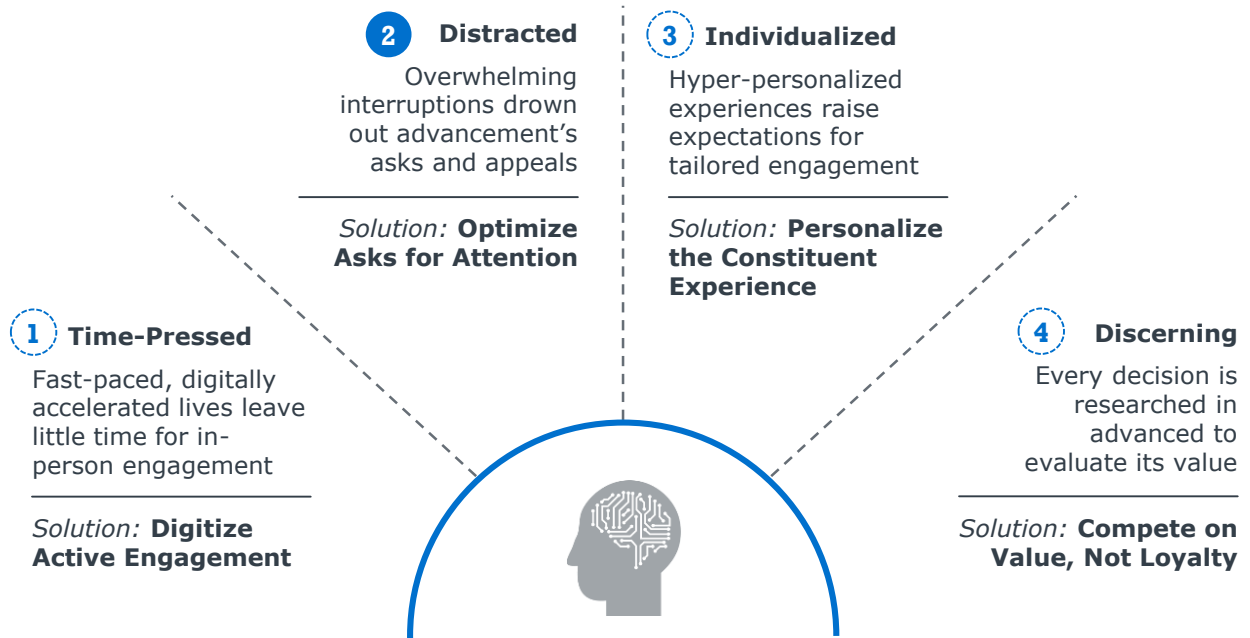
Today's Constituents Are...



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Today's Constituents Are...





Unprecedented Opportunities for Distraction

Digital Life Abounds with Demands on Our Attention

Lots of Interruptions...

1,324 Digital ad exposures per person per day

90% Of people feel "phantom" phone vibrations

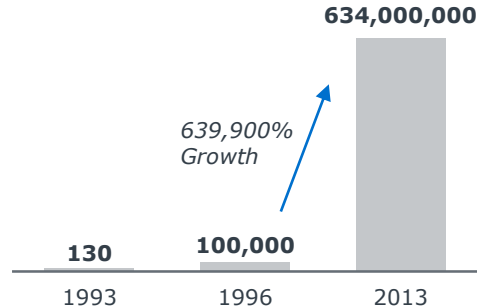
93 Smartphone alerts per person per day (One every 10 mins)



"Mobile phone users **receive 427%** more messages and notifications...**and send 278% more...**than they did in **2008.**"

...And Plenty of Temptations

Total Number of Websites on the Internet



A Small Sampling of the Web's Riches



An endless newsfeed



Funny cat videos



Personality quizzes



Every movie ever made

Sources: Amrita Deb, "Phantom vibration and phantom ringing among mobile phone users: A systematic review of literature," *Asia Pacific Psychiatry* 7, no. 3 (September 2015), 231-239; "The Average Briton's Mobile Phone Buzzes 93 Times Each Day," *Daily Mail Online*, February 21, 2018; "Web Page Sizes: A (Not So) Brief History of Page Size through 2015," *Yottaa*, December 14, 2015; Advancement Forum interviews and analysis.

Optimizing Asks for Attention

Two Strategies for Sustaining Awareness in a Noisy World



Identify and Alleviate Attention Risks

Use data and testing to optimize key conversion points

- Appeal optimization
- Optimized checkout page
- UX-tested website design



Capitalize on “Blue Ocean” Attention Opportunities

Cluster outreach in uncrowded places, times, and channels

- Channel redirect nudges
- Alternative channel engagement

A Minefield of Attention Risks

Constituents Face Countless Opportunities for Distraction Before Conversion

Every Additional Step Presents New Distraction Opportunities

An Incomplete Online Donor Journey (Email Edition)



An Abbreviated List of Threats to Attention

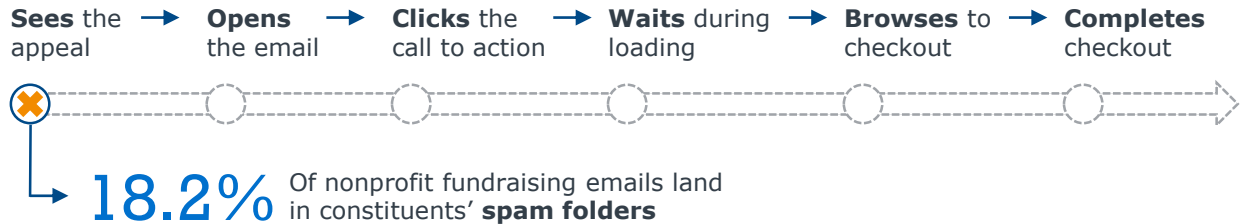
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- Long load times between checkout pages
- Gift amount in wrong place
- Hard-to-find "complete" button
- Slow wifi
- Unsubscribe button hard to find
- Uninspiring content
- Etc., etc.

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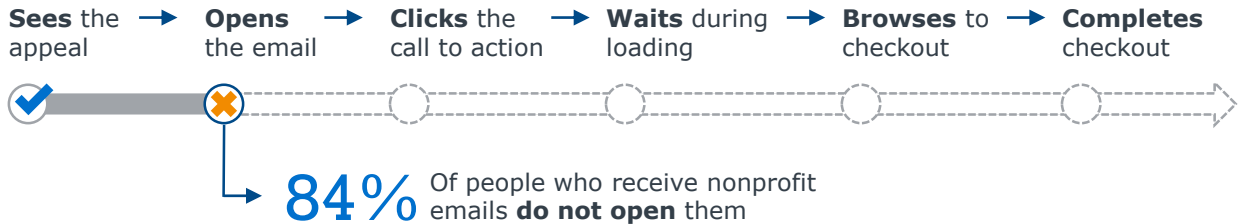
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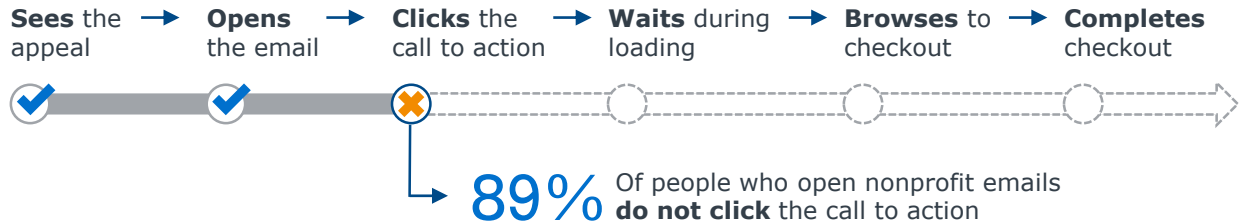
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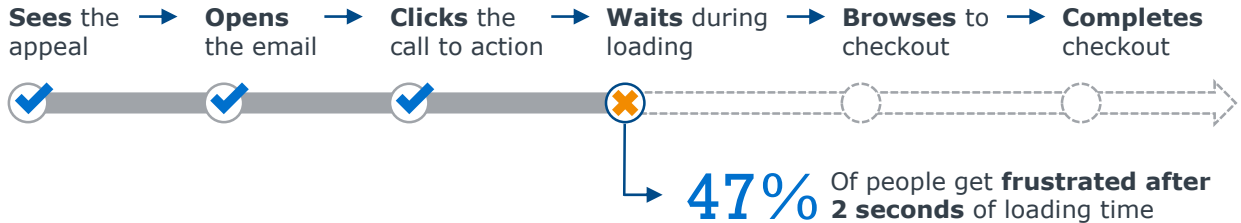
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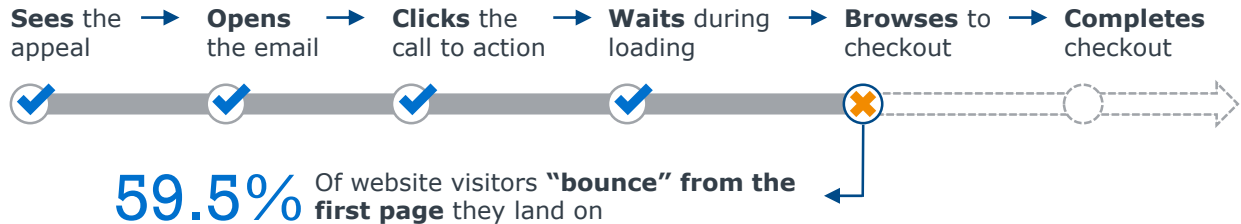
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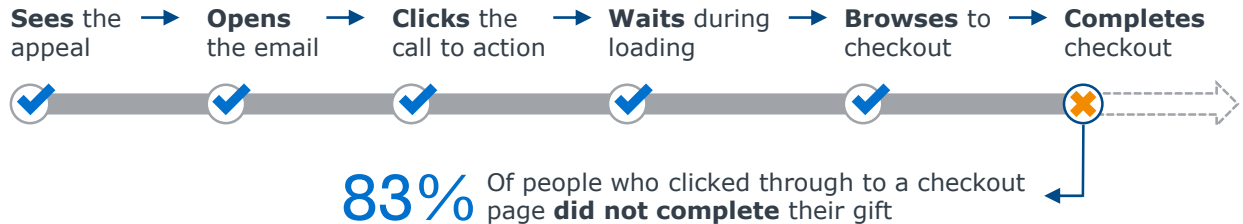
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Which Gift Planning Email Would You Send?

Advancement Marketing Managers Often Forced to Place Bets

BUILDING FOR THE FUTURE
GIFT PLANNING OPPORTUNITIES AT THE UNIVERSITY OF CHICAGO | FALL 2017




PROFILE

Beverly Livingston, AM'68, PhD'74, leaves a legacy starting with the Manhattan Project. [More »](#)



V.

BUILDING FOR THE FUTURE
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NEWS YOU CAN USE

As a parent, you no longer have legal authority over your child's affairs once he or she turns 18. [More »](#)



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IMPACT


After his brain-tumor diagnosis, Brian Thomas set up a scholarship fund for UChicago undergrads. [More »](#)



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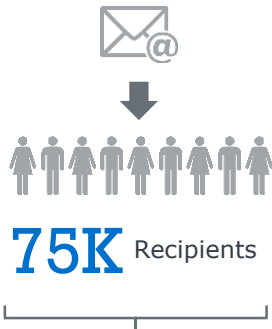
39% More audience engagement—
 despite a less obvious gift
 planning focus

Diversifying the Ask for Attention

UChicago Maximizes Attention Outcomes by Varying Communications

Typical Approach

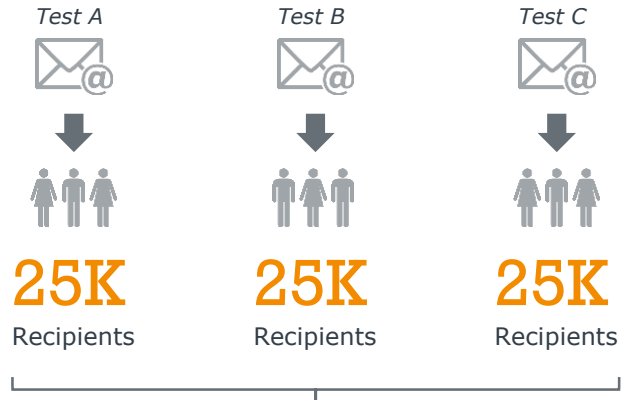
Roll the Dice on a Single Version



Undiversified campaign brings **risk of "attention flop"**

UChicago's Approach

A Few Eggs in a Few Baskets



By sending multiple versions, advancement shops can **minimize the risk** that they'll choose the wrong one

A Mix-and-Match Communications Strategy

UChicago's Multi-Variable Travel Emails Take Optimization to the Extreme

Four Dynamic Elements, 54 Possible Combinations



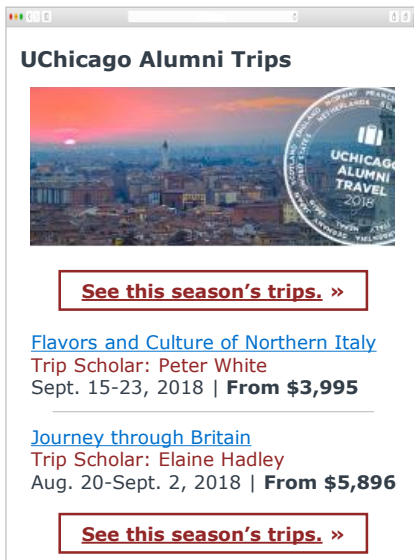
Subject Line

(3 options)



Button Placement

(3 options—top, bottom, both)



Featured Location

(3 options—Italy, Great Britain, Cuba)



Ordering of Trips

(2 options—by date or by price)



16 Versions of the email sent

2.3K Average recipients for each version

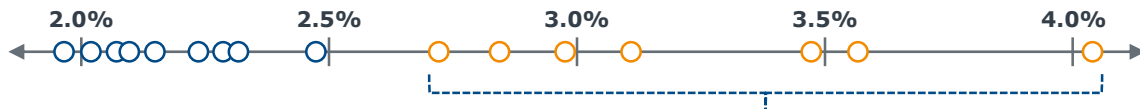
37K Total recipients of the emails

Hedging Your Attention Bets

“Diversified Portfolio” of Emails Weights Performance Upward

A Few Top Performers Elevate Campaign’s Aggregate Impact

Click Rate for 16 Email Versions



- Emails with **Below-Average** Click Rate
- Emails with **Above-Average** Click Rate



Less than half of the emails exceed 2.5% click rate—but their performance **lifts overall average** to 2.66%

54% **More clicks** for top performers
(595 clicks v. 387 clicks)

Post-Campaign Analysis Yields Lessons Learned for Next Attempt



Predictive model weighs each element



More Important

- ✓ Subject line
- ✓ Multiple calls to action

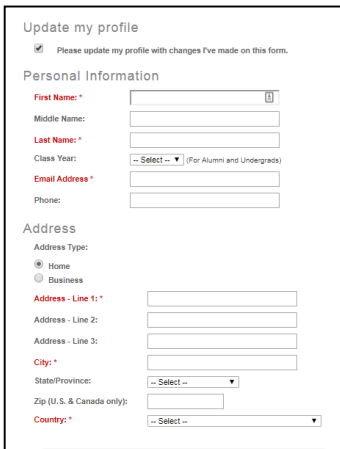
Less Important

- × Picture
- × Trip ordering

Optimizing the Checkout Page

Williams College Tests Old Against New Gift Completion Form

Old Giving Form



Update my profile
 Please update my profile with changes I've made on this form.

Personal Information

First Name *

Middle Name:

Last Name *

Class Year: (For Alumni and Undergrads)

Email Address *

Phone:

Address

Address Type:
 Home
 Business

Address - Line 1 *

Address - Line 2:

Address - Line 3:

City *

State/Province:

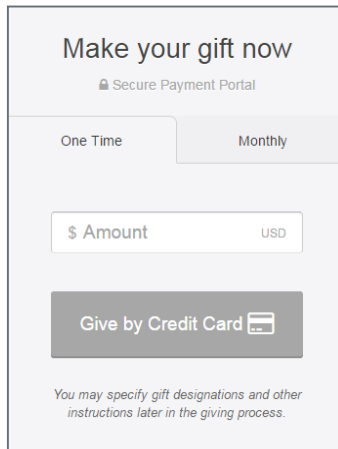
Zip (U.S. & Canada only):

Country *

- **25** form fields
- **One** long page
- **Not mobile friendly**
- Gift amount located **near the end**

55.7%
Completion rate

New Giving Form



Make your gift now

Secure Payment Portal

One Time Monthly

\$ Amount USD

Give by Credit Card

You may specify gift designations and other instructions later in the giving process.

- **11** form fields
- **Three** short pages
- **Mobile friendly**
- Gift amount located at the **beginning**

75.0%
Completion rate

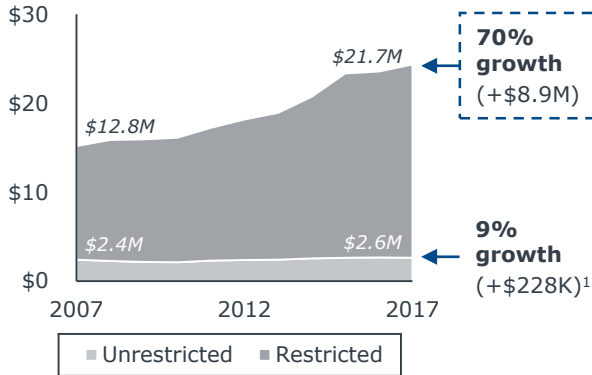
► **19.3% Improvement**
in Completion Rate

Fine-Tuning the Final Step No Longer Enough

'Restriction Shift' Brings Complexity, and Failure Paths, to Donor Experience

Restricted Giving Grows...

Average Current Ops Dollars (in Millions)



“Unrestricted giving is not dead but **the market has certainly shifted**. Donors today expect more choice, rationale, clear impact, and personalization whether they give \$5 or \$5,000,000.”

*Chris Tobin
Executive Vice President, Institutional Advancement
College of Charleston*

...And Donating Gets More Complex

Unrestricted “Checkout” Process

- 1 Decides to give
- 2 Visits website
- 3 Completes gift

Restricted “Checkout” Process

- | | |
|---------------------------|--------------------------------|
| 1 Decides to give | 6 Searches again (no results) |
| 2 Visits website | 7 Adds gift to shopping cart |
| 3 Browses units | 8 Repeats 5-7 |
| 4 Reads fund descriptions | 9 Adjusts amount for each fund |
| 5 Searches for fund | 10 Completes gift |

¹) After adjusting for inflation, current operations unrestricted giving declined 7.4% during this period.

The Scientific Method Comes to Online Giving

UMN Foundation Turns to UX Design Lab for Website Optimization

Identifying Online Giving Pain Points

“ We wanted to put the giving tool through its paces. If it isn't good, **people will abandon** midway through giving.”

*Steve Anderson
Senior Director, Creative Resources
University of Minnesota Foundation*

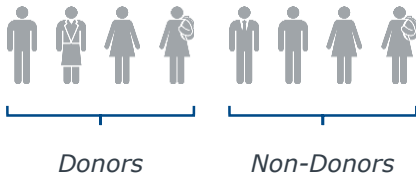


How can we design a **better user experience** on our giving website?

Test-Driving the Giving Page

5

Testing Sessions



A Laboratory for Digital Experiences

The University of Minnesota's Usability Lab



Equipped with Sophisticated UX Tools

- Soundproof observer room
- One-way mirror
- Hi-def cameras and displays
- Facial expression and click tracking

A Surprisingly Challenging Obstacle Course

Website Optimization Testing Surfaces Extensive UX Shortcomings

Users Presented with Three Simple Tasks...

- 1 From home page, go to **giving page**
- 2 Browse units and find a **specific fund**
- 3 Complete and confirm **gift transaction**

...Which Turned Out to Not Be So Simple

Errors and Frustrations Surfaced During Testing Sessions

Website Navigation

- ✘ Clunky, unintuitive
- ✘ Too many clicks

Gift Designations

- ✘ Hard to find
- ✘ Slow browsing

Confirmation Page

- ✘ Mistaken for gift receipt
- ✘ Not sure gift completed

Website Updates Yield Immediate Returns

Alleviating Attention Risks Drives Giving Day Performance

Immediate Improvements Made to Giving Website



Added a **search** box



Reorganized funds for more intuitive **browsing**



Consolidated **checkout** into a single page



Clarified information on **confirmation** page

Performance Points to Improved User Experience

Giving Page KPIs on Give to the Max Day 2017

50%

Decrease in checkout **abandonment** (from 66% year prior to 33%)

12%

Mobile conversion rate (up from 0% year prior)

34%

Increase in the **number of donors** compared to prior year

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Most Engagement Channels Now ‘Red Ocean’

Competition from Other Organizations Lowers Everyone’s Returns



A Tough Fight in Crowded Waters

“As the market space gets crowded, **prospects for profits and growth are reduced**...and cutthroat competition turns the red ocean bloody.”

*W. Chan Kim & Renee Mauborgne
Blue Ocean Strategy*

Too Much Noise in Our Go-To Channels

Direct Mail

493M Pieces of direct mail sent per week

Social Media

2.1B Social media posts per day

Email

156M Emails sent per minute

Sources: W. Chan Kim and Renée Mauborgne, *Blue Ocean Strategy: How to Create Uncontested Market Space and Make the Competition Irrelevant*, (Boston: Harvard Business Review Press, 2015); Jeff Desjardins, "What Happens in an Internet Minute in 2017," *Visual Capitalist*, August 02, 2017, <http://www.visualcapitalist.com/happens-internet-minute-2017/>; "Top 20 Facebook Statistics - Updated July 2018," *Zephoría Inc.*, July 09, 2018, <https://zephoría.com/top-15-valuable-facebook-statistics/>; Advancement Forum interviews and analysis.

Text Messages: Great Untapped Potential

High Attention Quotient, But Most Alumni Shops Overlook Texting

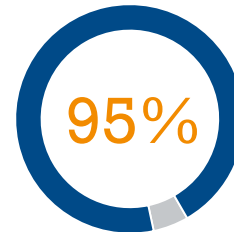
Lots of Activity—and Attention

75 Texts **sent daily** by 18- to 24-year-olds

95% Of text messages are **read within 5 minutes** of receipt

94 **Minutes per day** college students spend texting

Still Unexplored in Alumni Relations



Of alumni relations shops **don't use text messaging** as a communication channel

Meeting Alumni Where No One Else Is

Robert Morris University Replaces Phoneathon with Text Message Service

Poor Phoneathon Performance

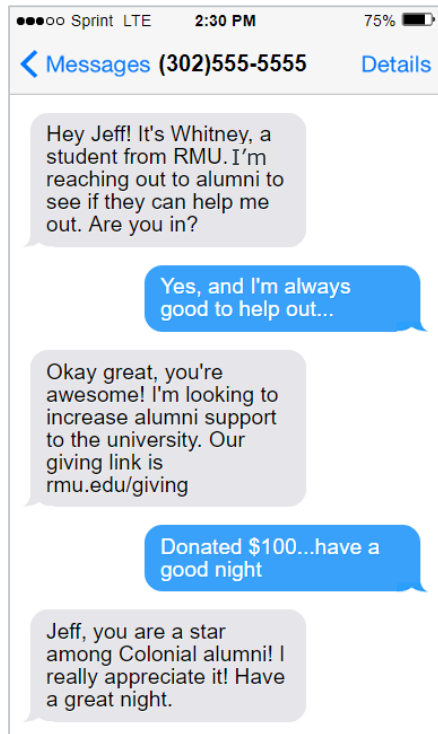
↓ Dollars ↓ Donors ↓ Pick-up rate

Texting Replaces Phone Calls

One student can text up to **200 alumni** at once

Texts used for **gift appeals, event invites, and information updates**

Platform interface enables **two-way conversations** at scale



Lack of Competition Elevates Performance

'Blue Ocean' Text Strategy Captures Uncontested Mindshare

Robert Morris Text Messages Attract Time and Treasure



DC Alumni Event Text Invitations

350 Individuals on the **texting list**

25% Of alumni texted **replied** to the message

56 Event **attendees**



Senior Giving Campaign Text Appeals

600 Seniors were sent **reminder texts** about Senior Salute event

11% Of seniors texted **replied** to the message

110 **Donations received** from seniors over the course of 2 days



Optimizing Asks for Attention

Strategies for Sustaining Awareness in a Noisy World

1 Identify and Alleviate Attention Risks

Short Term

- ▶ Send multiple appeal versions to balance attention risk
- ▶ Simplify check out page to minimize user attrition and attention risks

Long Term

- ▶ Test and evaluate the impact of different communications elements
- ▶ Conduct user experience testing across giving website

2 Capitalize on “Blue Ocean” Attention Opportunities

Short Term

- ▶ Identify communication channels with uncontested mindshare
- ▶ Launch campaigns during typical “off-season” where there is less competition

Long Term

- ▶ Create a presence in non-traditional communication channels
- ▶ Redirect website audiences to giving opportunities



Engaging Your Team in Strategy Formation

A Conversation Guide for Advancement Leaders

Discussion Questions

Notes and Ideas

1 With which channels have we had the most success winning mindshare?	
2 In what channels, or with what campaigns, have we had the least success? Why?	
3 What new channels should we begin to explore? What are their pros and cons?	
4 At what stage of their “journeys” do we believe constituents drop off? Why?	
5 What technology can we use to gather user input to optimize communications?	



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