
The Individualized and Discerning Constituents: Preparing for Advancement's Digital Future Webconference Series

Translating Insight Into Action

A Discussion and Self-Reflection Guide

Instructions:

Consider the following questions to connect today's webconference presentation with your own experiences and institutional context. The questions can be used for self-reflection or group discussion.

The Individualized Constituent

1. What communications or experiences can we personalize at scale?
2. What technology can we use to give the appearance of personalization?
3. In what ways can we use content we're already posting or sending to surface constituents' affinities?
4. What steps would we have to take to code or tag communications by interest?
5. What information do we already have collected that we can analyze for actionable insights on affinity?

The Discerning Constituent

6. Are we communicating often and effectively enough (beyond solicitations) to stay top of mind?
7. In what ways could we use our current technology to create an adaptive email campaign?
8. Where might our understanding of constituents' needs fall short? How might we fill those information gaps?
9. How do we currently segment alumni? What characteristics could we incorporate into a future model?
10. What steps can we take to assess which programs need to be revamped to meet constituent needs?

Prioritization Guide

Speeding Implementation and Ensuring Follow-Through

Instructions:

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
<p>Person-Branded Email Outreach <i>University of Florida, Boston College</i> Email communication strategy shifted to use personalized email sender names instead of generic institution name.</p>	<p>1 2 3 4 5 Disagree Agree</p>	
<p>Engagement Portfolio Managers <i>Elon University</i> Alumni relations staff members are assigned portfolios of alumni to engage. Portfolios are segmented by long-term major gift potential to prioritize outreach efforts.</p>	<p>1 2 3 4 5</p>	
<p>Constituent Listening Campaigns <i>University of Notre Dame</i> Alumni send feedback to advancement, and staff respond to input and concerns with one-on-one and group communications.</p>	<p>1 2 3 4 5</p>	
<p>Hyper-Targeted Affinity Asks <i>University of Connecticut, Boston University</i> Constituents who engage with topic-specific posts on social media receive appeals to give to related funds.</p>	<p>1 2 3 4 5</p>	

Prioritization Guide (cont.)

Speeding Implementation and Ensuring Follow-Through

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
<p>Initial Consideration Marketing <i>McGill University, UCLA</i> Communications activity throughout the year shifts from appeals to cultivation and engagement. Hard asks capitalize occasionally on the resulting momentum.</p>	<p>1 2 3 4 5 <i>Disagree</i> <i>Agree</i></p>	
<p>Adaptive Nurture Campaigns <i>Boston College</i> Email clicks trigger follow-up communications highlighting beneficiaries' stories and making a hard ask.</p>	<p>1 2 3 4 5</p>	
<p>Program Value Analysis <i>University of San Francisco</i> Survey analysis pinpoints the true value proposition of volunteer programming. Programs are reframed to put identified motivations at the forefront.</p>	<p>1 2 3 4 5</p>	
<p>Life Context Personas <i>Wake Forest University</i> Psychographic personas created based on alumni life stages (beyond age) used to segment alumni and connect them with programming that they will find to be uniquely high-value.</p>	<p>1 2 3 4 5</p>	



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