



Optimizing Advancement's Early Pipeline Development

Increase Alumni Engagement's ROI

Suggested Zoom View

The screenshot shows a Zoom meeting window with the following elements:

- Zoom Meeting ID:** 841-573-482
- Status:** You are viewing Meeting Host's screen
- View Options Menu:**
 - Zoom Ratio: Fit to Window >
 - Request Remote Control
 - Annotate
 - Exit Full Screen
 - Side-by-side mode (checked)
- Meeting Host Video:** A video thumbnail of the Meeting Host.
- Participant List:** A list of participants with a 'Mute' button and a three-dot menu icon next to the name 'Participant'. The 'Hide Non-Video Participants' option is selected in the menu.
- Meeting Content:** EAB logo and 'EAB Virtual Meeting 2020' text.
- Bottom Toolbar:** Mute, Start Video, Invite, Participants (2), Share, Chat, Record, and Leave Meeting.

Enable side-by-side viewing of video and slides: View Options, then side-by-side mode

See only participants on camera: Click dots next to your name; then Hide Non-Video Participants



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Will We Notice COVID in the Rear-View Mirror?



Scientists Think the Pandemic Will Be a Blur for Most People

An Oxford Dictionary Word of the Year



"Blursday" (noun)

\blurz-dey\

a day of the week that is indistinguishable from any other

Science Suggests We'll Soon Forget the Pandemic

Lack of daily variety



Fewer distinct memories created

Pandemic-induced stress



Struggle to recall details from period



Will We Forget What Fundraising Was Like During the Pandemic?



Zero hours spent in airport lounges



\$1M+ proposals delivered virtually



1,000+ attendee zoom events



Emergency-fund giving galore



An explosion of planned gifts



Hiring freezes during campaigns

Source: Hutchins Aaron, "[How the pandemic has rewired our brains](#)," *Maclean's*, October 8, 2021; Shayla Love, "[You'll Probably Forget What It Was Like to Live Through a Pandemic](#)," *Vice*, April 21, 2020; "[2020 Words of an unprecedented year](#)," Oxford Languages; EAB interviews and analysis.

Perennial Challenges We Can Now Address

It Is Time to Reexamine Key Steps in Major Gift Prospect Development

Engagement

Major gift prospects don't respond to engagement content

Qualification

Cultivation



60%

Of alumni had never been to an alumni event

80%

Of alumni didn't feel very connected to their alma mater

Unengaging Content



Homecoming



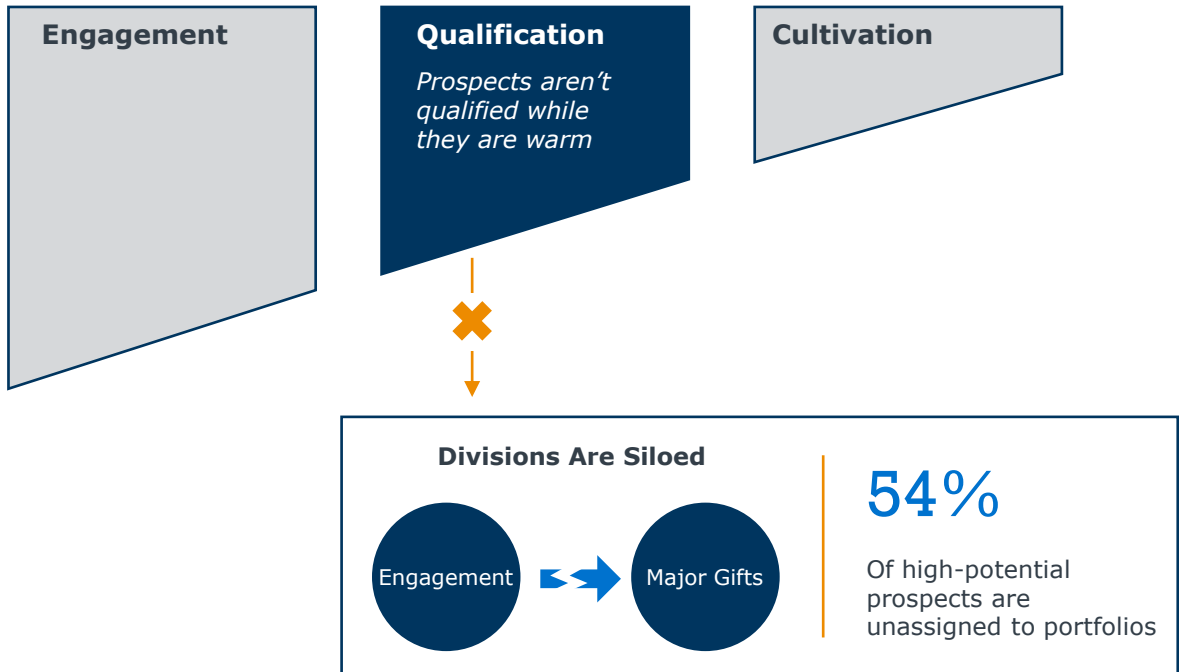
Happy Hours



Reunions

Perennial Challenges We Can Now Address

It Is Time to Reexamine Key Steps in Major Gift Prospect Development



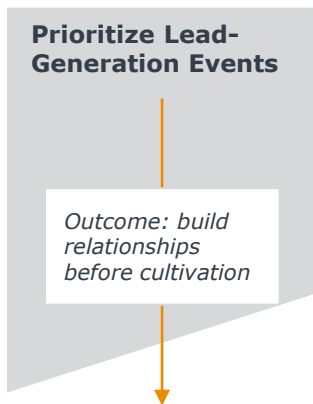
Perennial Challenges We Can Now Address



It Is Time to Reexamine Key Steps in Major Gift Prospect Development

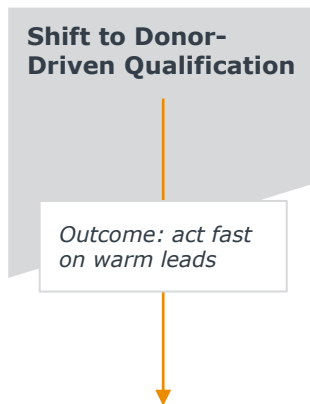


Our Roadmap for Today's Discussion



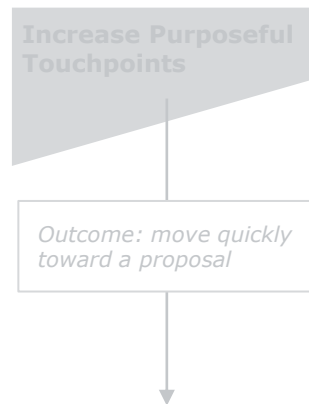
Strategies

- Prioritize Events That Attract HNW Prospects
- Create and Execute Prospect Journeys Within Engagement



Strategies

- Alert MGOs When Prospects Engage
- Increase Social Pressure To Qualify



Strategies

- Build Virtual Communities of Philanthropic VIPs
- Increase Expectations for Prospect Touchpoints



Prioritize Lead- Generation Events

SECTION

- Strategy #1: Prioritize Events That Attract HNW Prospects
- Strategy #2: Create and Execute Prospect Journeys Within Engagement

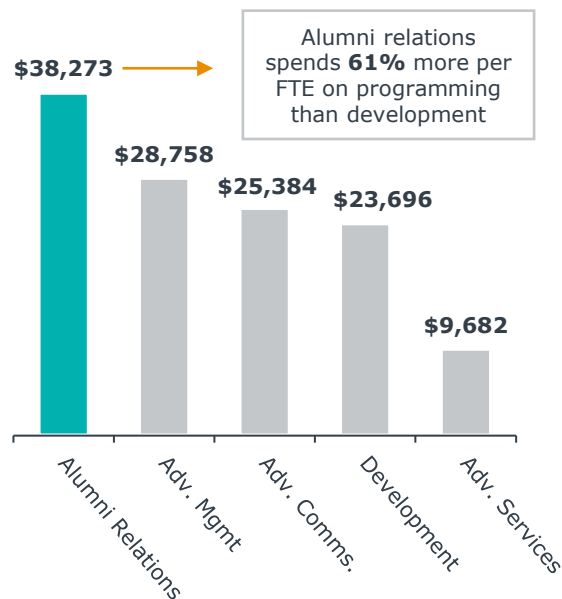
1

A Huge Investment in Programming...

...But With Questionable Returns

Placing Our Bets on Programming, Not People

Median Operating Expenditures per FTE, 2016-2020



“

A More Strategic Path Forward

“We’ve had a nearly two-year break in our regular events schedule. That’s not necessarily a bad thing. We’ve always had a lot of traditional events on the calendar that didn’t bring high ROI. We’re hoping for a clean break from those moving forward. **There are going to be a lot of things we don’t want to start doing again because of their low ROI.**”

*Josh Friedman,
Senior VP, Development and
Alumni Relations
University of Miami*

”

Alumni Relations' Low-ROI Problem



Too Often, Engagement Strategy Misaligned with Development Needs

Why Do Events Fail to Warm Major Gift Prospects?



Programming Isn't Designed to Appeal to Major Gift Prospects

- Generic events like happy hours and reunions don't attract HNW alumni
- "Success" is measured in number of event attendees



One-Off Events Lack a Path to Deeper Prospect Affinity

- Priority is planning the next event, not further prospect engagement
- Individual attendee engagement patterns are not tracked

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Key Strategies

1 Prioritize Events That Attract HNW Prospects

Minimize time spent on low-ROI events and focus on those that appeal to rated prospects

2 Create and Execute Prospect Journeys Within Engagement

Build deeper connections with rated prospects by engaging them with multi-phase content



Taking Low-ROI Events Off the Table

MSU Denver Creates a Prioritization Process for Event Planning

“

“Advancement really doesn’t need to be planning the majority of the events we’re planning. **We get sucked into lots of things that don’t move our donors** along the cultivation journey. We need to assess whether we should plan certain events or if there are other people on campus who should be planning them.”

*Katie Biscoe
Former AVP Advancement
MSU Denver*

”

Advancement Event Assessment

Prospect-Focused Invite List

(check all that apply)

- Advancement controls the invite list
- Invitation is exclusive to rated prospects
- 5+ rated prospects are registered
- President or provost will attend

Compelling Cultivation Content

(check all that apply)

- Provides exclusive networking
- Highlights campus or student needs
- Introduces constituents to new and innovative initiatives

Estimated cost? _____

Estimated planning hours? _____

Assess Your Engagement Event ROI and More



[EAB's Alumni Relations Program Review Toolkit](#)

- Calculate total resource investment
- Determine how each program impacts fundraising
- Determine ROI by comparing total resource investment against total impact on engagement and fundraising

Practice “less is more”

Assess investment and impact on engagement and donations



Program Review

- Evaluate budget and staff time
- Measure value to alumni, customization, accessibility, limited duration and scope
- Determine impact on fundraising with alignment to priorities or donations

EAB Toolkit

Quantify your impact

Compare investment to impact to identify top programs



ROI Matrix

- Map programs on a scale of high and low resource investments
- Map programs on a scale of high and low impact
- Evaluate programs to stop doing or to reduce investments

Creating a Journey from Engagement to Portfolio

Multi-Phased Content Deepens Prospects Affinity

Miami University Wine Tasting 2.0 Follows Prospects' Leads



“When a program is getting a lot of engagement, you create a next step. You invite them to an exclusive activity **that is likely to result in deeper engagement by high-net-worth prospects.**”

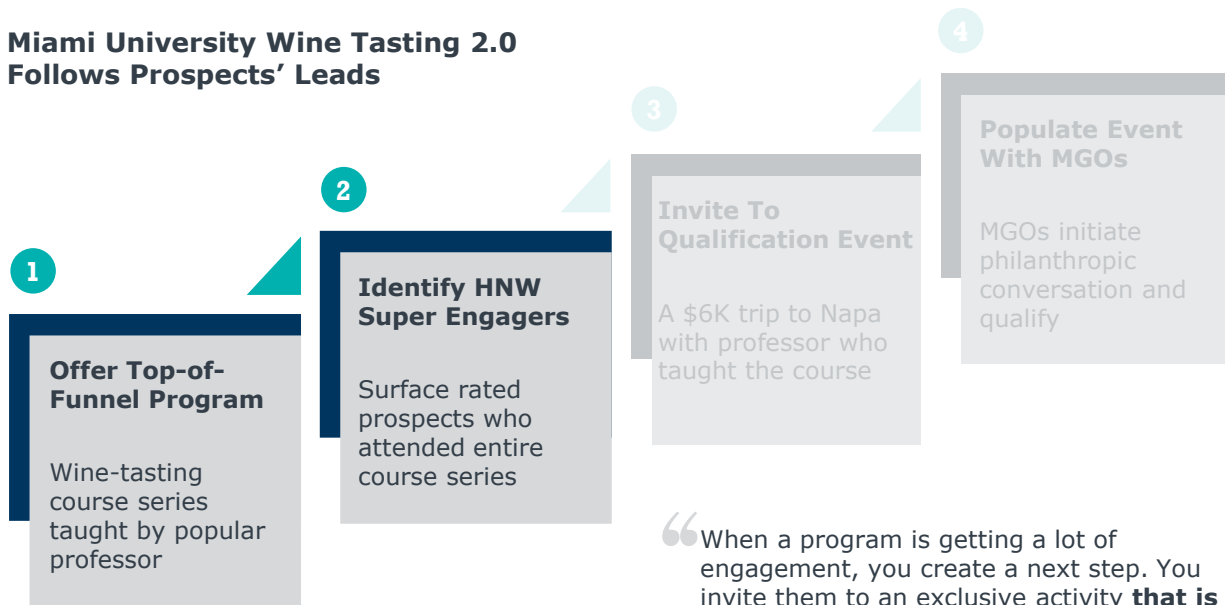
*Brad Bundy
Senior AVP, Advancement
Miami University*



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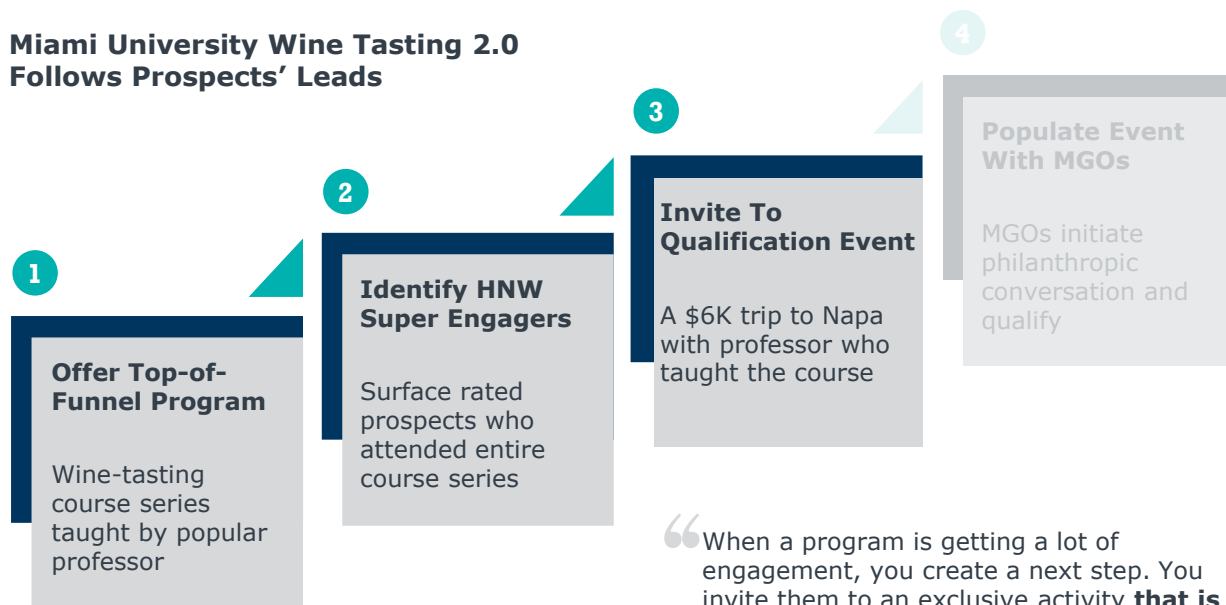
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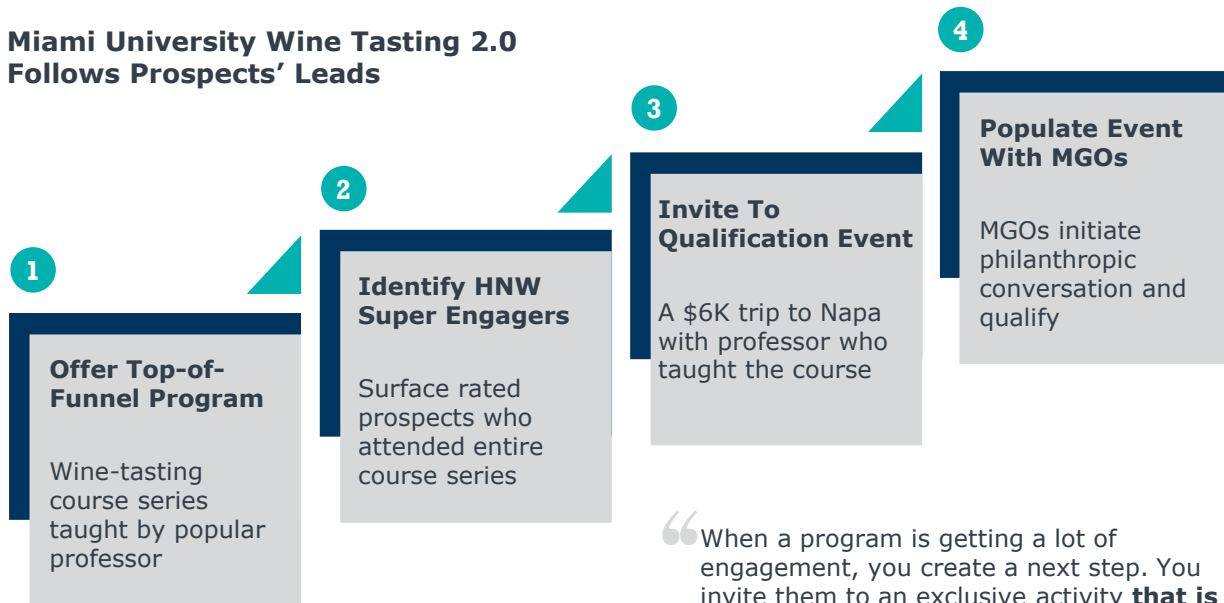
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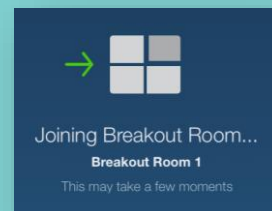
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Brainstorming with Your Colleagues

Moving to Break-Outs

Momentarily, we will move into breakout rooms

You will see a message that looks like this →
Prompting you to join a virtual room with
a handful of other attendees.



 **10 Minutes**

**Discuss engagement program ideas
that already exists and could
deepen affinity with prospects not
already in portfolios**



Shift to Donor-Driven Qualification

-
- Strategy #3: Alert MGOs When Prospects Engage

SECTION

2

The Pipeline Paradox

Engagement's Record Year Didn't Translate to New Pipeline Prospects

Alumni Engaged in Record Numbers During the Pandemic...



University of Wisconsin's "UW Now Livestream" about the labor shortage had **1,400** attendees



Elon's presidential interviews with industry experts had **500** attendees monthly



Stonehill College's virtual campaign launch tradeshow had **830** attendees

...Yet We Failed to Move Attendees into the Gift Pipeline

Qualifications Down For Majority

FY21 v. FY20 change in the number of qualifications

↓ **61%** Saw flat or declining qualifications

↓ **32%** Dropped by 10%+

A Disconnect Within Advancement

By the Time We Act, Engagement's Warmth Has Gone Cold

A Breakdown That Costs Us New Major Gift Donors



Why Act Fast? The Importance of Prospect Warmth In Sales

8.8x

Higher close rate for warm sales leads compared to cold sales leads

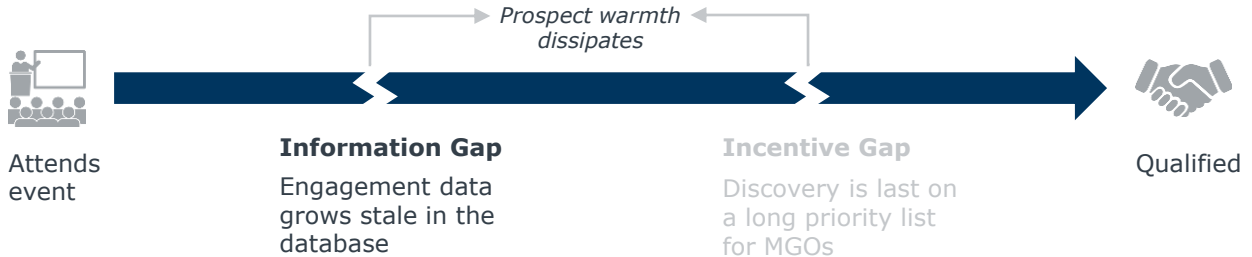
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Higher conversion rate when salesperson cuts inquiry response time in half

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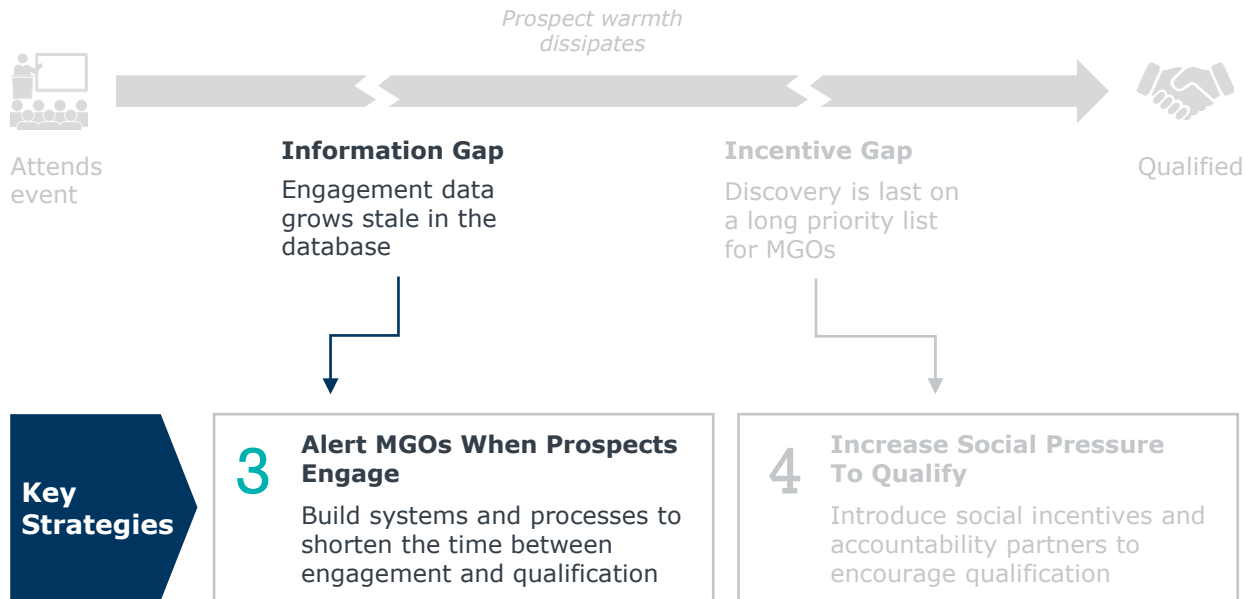
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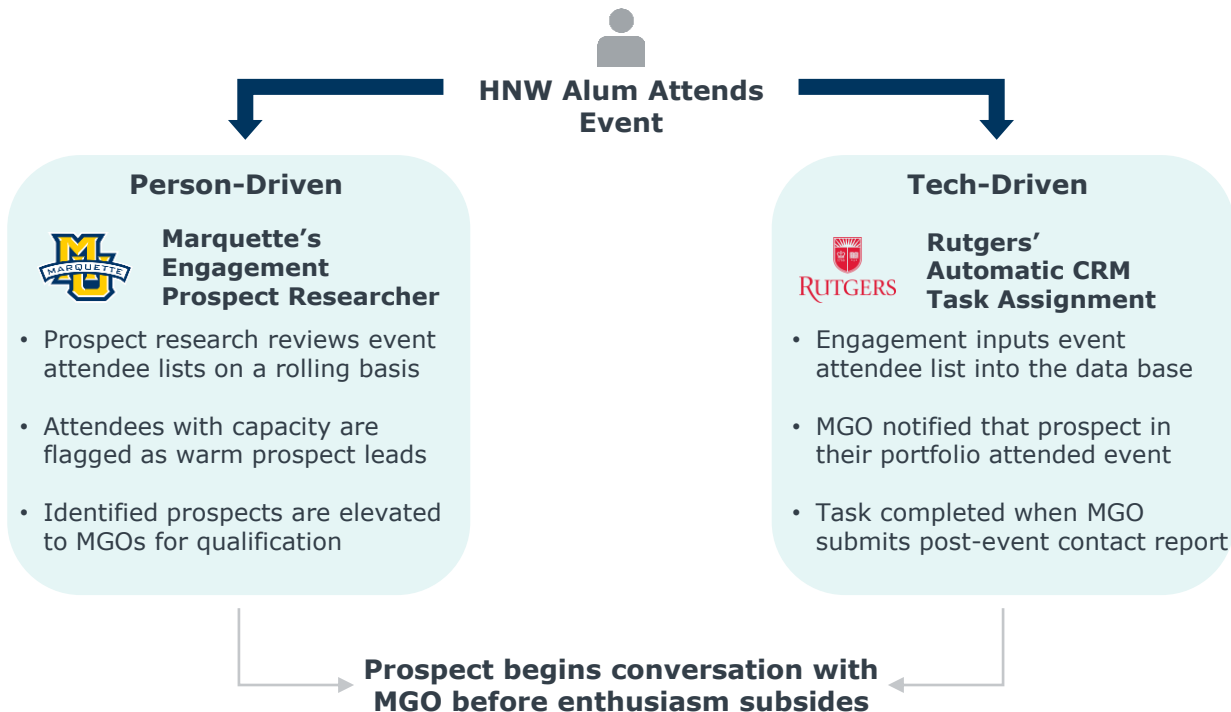
A Breakdown That Costs Us New Major Gift Donors





Prompting DOs To Take Action

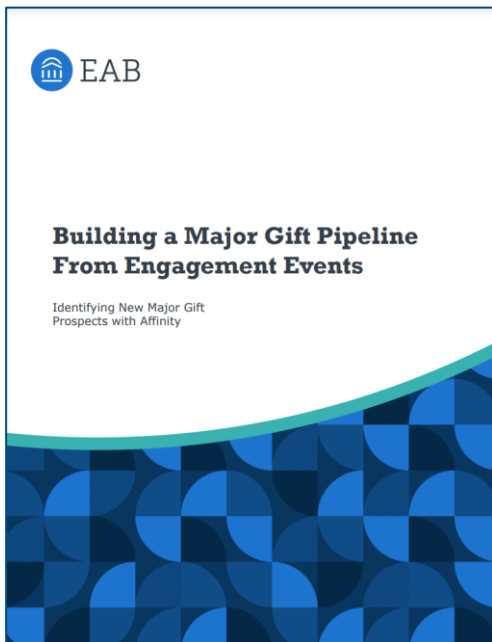
Two Institutions Alert Gift Officers as Soon as Prospects Engage



EAB's Toolkit to Identify Top Prospects



Creating a System like Marquette's



1

Review Event Attendees for Major Gift Capacity

Determine who, how, and when major gift capacity attendees will be identified by alumni relations or another division

2

Notify Development Officers About Warm Major Gift Prospects

Decide how MGOs will be notified, and what expectations will be put in place to ensure they reach out quickly

Prioritize Lead-Generation Events

Outcome: build relationships before cultivation

Strategies

- Prioritize Events That Attract HNW Prospects
- Create and Execute Prospect Journeys Within Engagement

Shift to Donor-Driven Qualification

Outcome: act fast on warm leads

Strategies

- Alert MGOs When Prospects Engage
- Increase Social Pressure To Qualify

Increase Purposeful Touchpoints

Outcome: move quickly toward a proposal

Strategies

- Build Virtual Communities of Philanthropic VIPs
- Increase Expectations for Prospect Touchpoints

The Advancement Forum Team



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