



PARSONS | TKO

Welcome

- All participants' microphones have been muted & cameras have been turned off
- Please post any questions using the Q&A function and share any comments in the chat
- This webinar is being recorded & will be distributed after the session
- Live captions are available in your Zoom meeting controls toolbar

PARSONS | TKO

3 steps to uplevel your team's end-of-year fundraising strategy

August 9, 2023



Meet our panelists



Stefan Byrd-Krueger

Chief Analytics Officer
at ParsonsTKO



Jamie Mueller

Chief Growth Officer
at ParsonsTKO

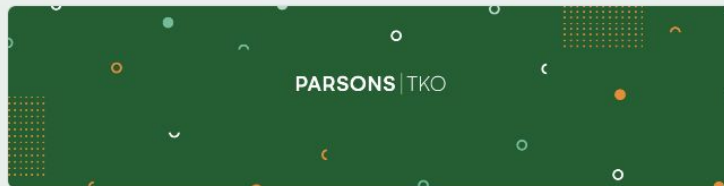


Janet Cobb

Personal Fundraising
Coach at Bonterra

Worksheet

- Pencils down. Forms up. Click [this link](#).
- The form mirrors the sections of this presentation
- Mark down your self-evaluations, reflections, and the parts you are most interested in
- If you share your email, we'll send you a follow up summary of your thoughts along with links & materials



Small steps to improve EOY Fundraising

This worksheet is designed to help you further explore your comfort, confidence, and motivation to take small steps to improve your fundraising. Filling it out will help you assess the right steps for you and your organization, and will help you hold yourself to your commitments.

Small step evaluation

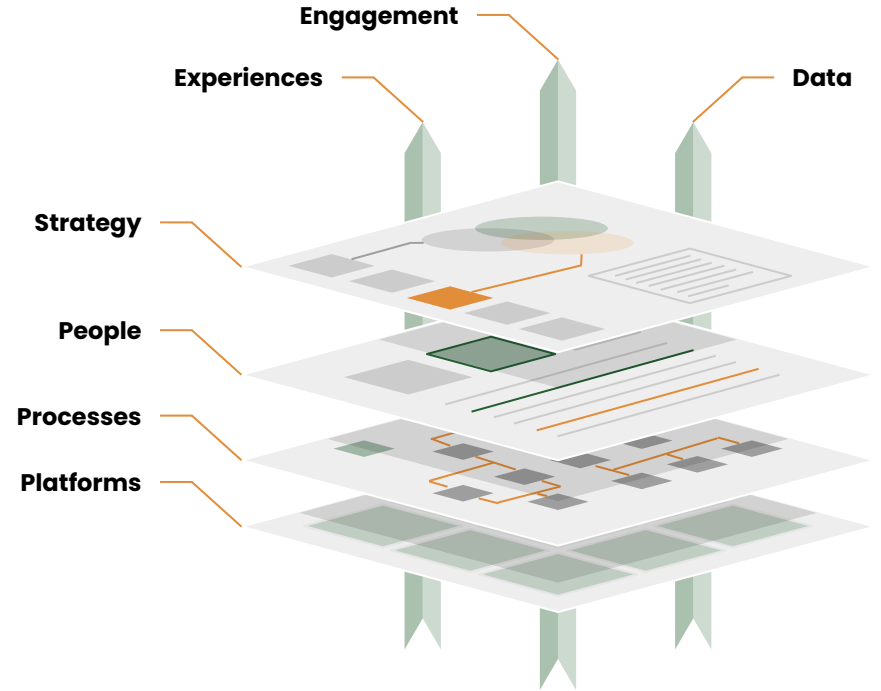
There are a lot of ways to improve your campaign. Which might be right for you?

	I "get" it	I can do it	I want to do it	I WILL do it
Data hygiene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve deliverability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data append	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit card updater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wealth screening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interest survey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Segmentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The way we see possibilities

Engagement Architecture ♦ noun

The ParsonsTKO philosophy and methodology that addresses your outreach platform as a holistic ecosystem—an interconnected set of people and systems that work together to advance your mission.



Take small steps

Hire/restructure fundraisers

24%

Major overhauls

32%

19%

Launch new channels

New donor platform

vs

Optimize web and email CTAs

Segment donor communication

Surveying your audience

3%

8%

5%

Build on existing practices

4%

Donor data acquisition

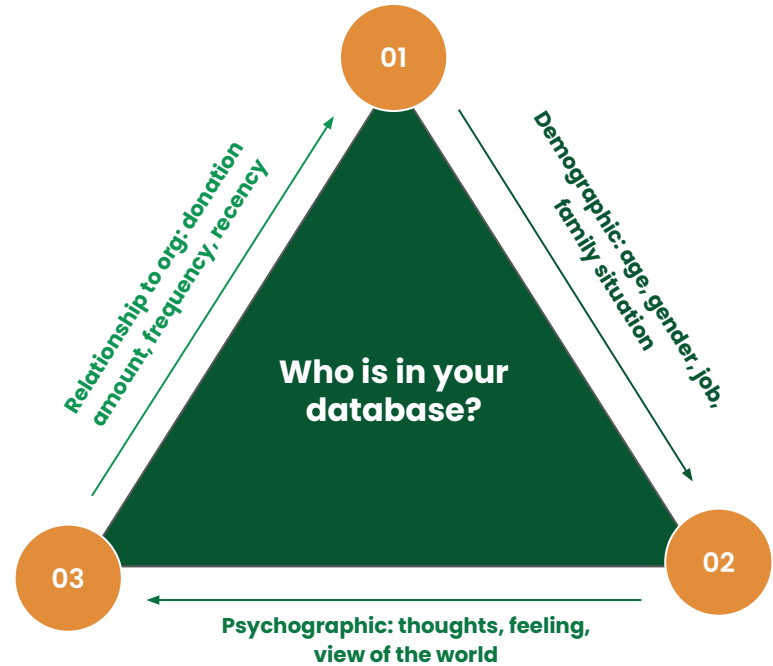
9%

6%

Cross-dept appeals

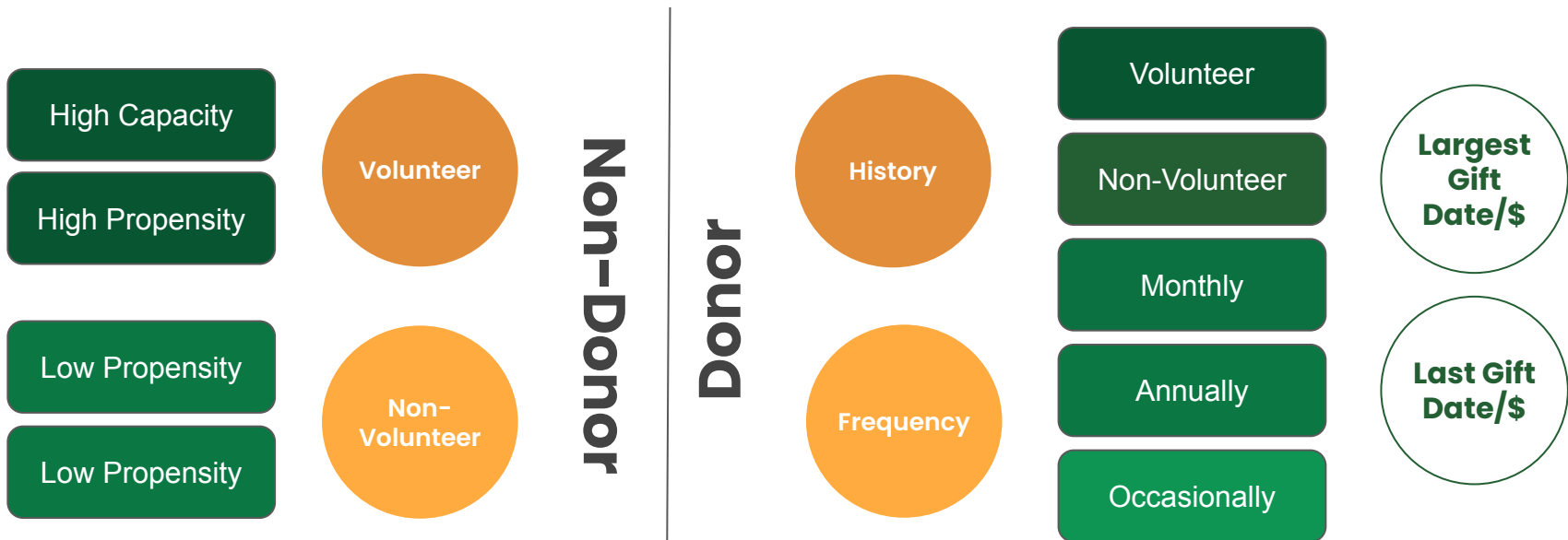
Personalized follow-up & recurring asks

Segmentation



- Demographic will impact channels and message.
- Psychographic determines the best message
- Relationship to org decides timing and ask amount.

Engagement Plans



Direct Mail

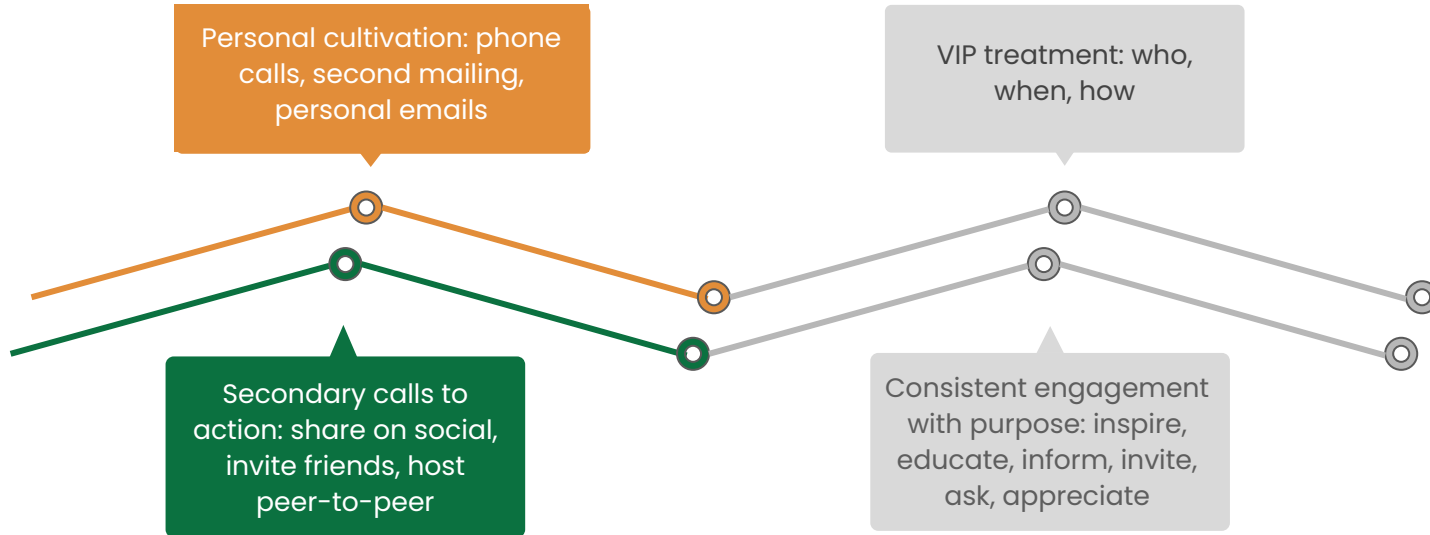
Social Posts

Email 1

Email 2

Email 3

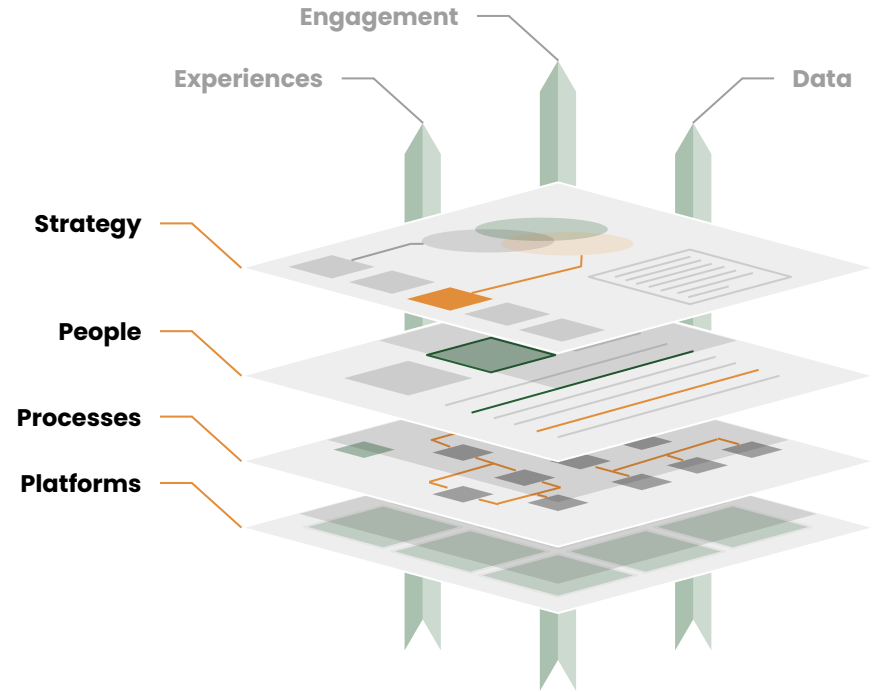
Create Conversation & Relationship



KEY TIP
Have a solid secondary ask and ongoing engagement plan for each giving level

The way we see possibilities

To change your
outcomes **look**
inside yourself



Where do we make these small changes?



Optimize throughout the campaign lifecycle

P|TKO



Show me on your calendar

A simple question:

What do you want to try to do to improve end-of-year fundraising?

- Who do you need to pull this off?
- How much time will it take?
- When will you sit down to do it?

Takeover an existing team meeting

Go update the agenda

During a set production cycle

Add it to your PM tool or written SOP

Schedule a new one-on-one with a peer advocate

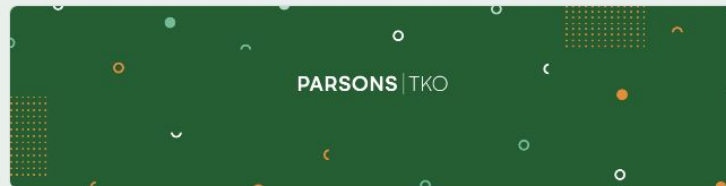
Send them an invite today

I'll do it myself.

Block time now

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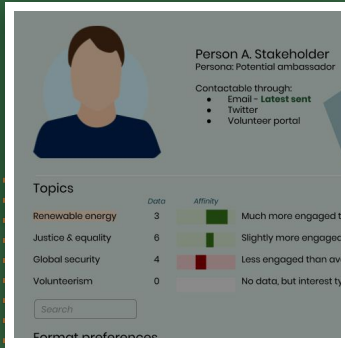


Questions?

- How do I?
- But what about X?
- My org has this challenge...

P|TKO Please, take our free content

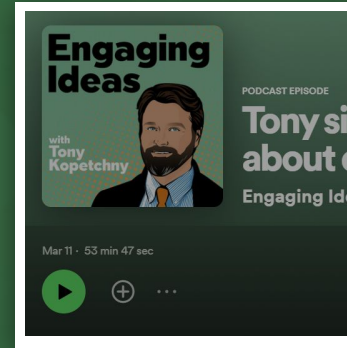
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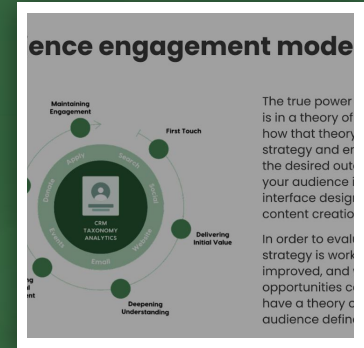
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