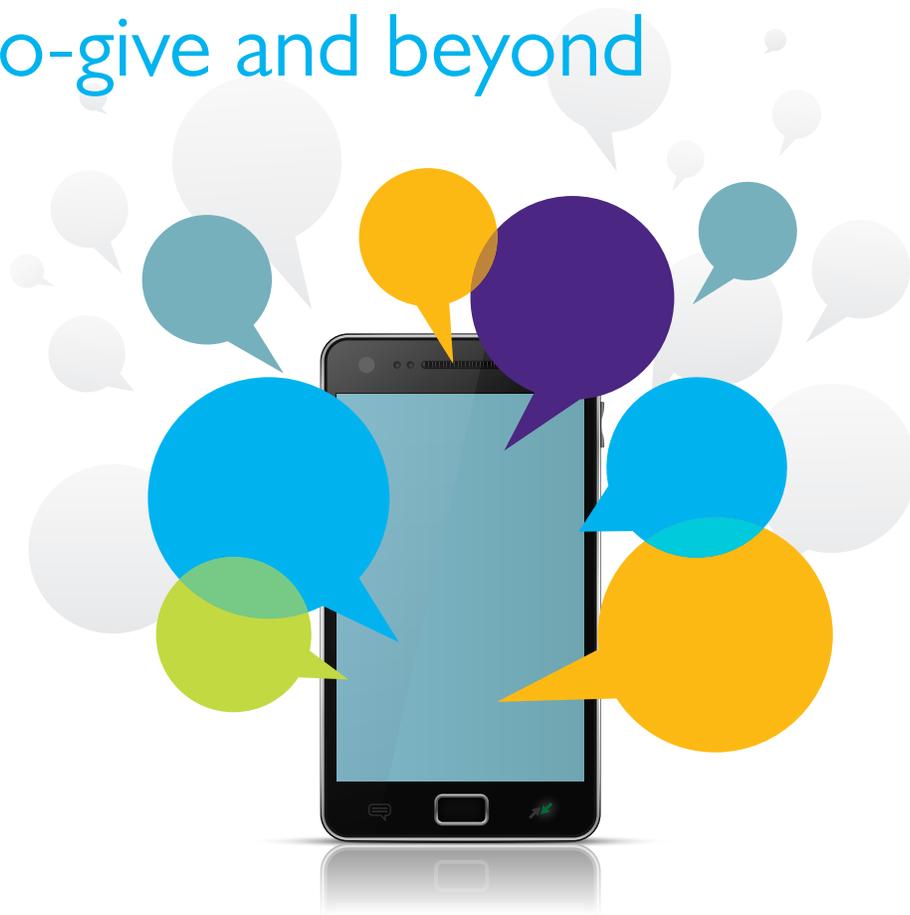


The Mobile Frontier:

Successful strategies from
text-to-give and beyond



Co-Authored by **Network**  **for Good**[®]

PUBLISHED FEBRUARY 2012

Authors Katya Andresen, Chief Strategy Officer, Network for Good
 Tom Krackeler, Vice President, Common Ground, Convio, Inc.

INTRODUCTION

Smartphones, iPhone, texting. Everywhere you turn there seems to be a new story about mobile, be it on your Facebook page or your local evening news.

Mobile has expanded beyond simple text-to-give campaigns designed to aid in times of emergency. For nonprofits, the magic of mobile is having a way to reach constituents regardless of where they are. Mobile is the most immediate communication channel out there, and there are many proven strategies and emerging techniques for using it to engage your supporters. Fundraise via mobile, allow participants to register for your event, encourage the community to advocate for your cause or simply use mobile to be accessible and create a dialogue. It's up to you. In this guide, we provide a brief overview of mobile, outline its potential benefits and explore the ways in which your organization can use it for deeper, more personalized engagement. We'll help you ask the right questions to determine if mobile is right for your organization and who should be involved in the effort. And we'll explore ways to successfully integrate mobile into your other fundraising efforts for the most impact.

What does mobile include? Here are the basics:



Smartphone: A mobile phone built on a computing platform, allowing you to do more than just make calls. Many smartphones such as the Apple iPhone, RIM Blackberry or those powered by Google's Android software allow you to manage your daily schedule, take photos, check email and browse the Internet.



Mobile Web: A browser used to access the Internet via a mobile device. The mobile web poses unique challenges. Because screen sizes are much smaller, many organizations streamline the information they provide and work to make sure any site content or forms are easy to use.



App: If you're familiar with the iPhone, you're familiar with apps, small applications that are built to work with smartphones. They do not generally access the mobile web via a browser but instead help the user focus on a specific task – organizing a grocery list, looking up information on a favorite film, booking an airline ticket, etc. Recent research indicates that 35 percent of U.S. adults have cell phones with apps, a number that's expected to continue to grow¹.



Text Messaging: Text messaging allows users to exchange brief messages over a network. The messages can be limited to text only or can contain images, video or sound content and many include a call to action, either to visit a website or respond with a short code that will collect a donation. Text is also among the most popular means of mobile communication with The Pew Research Center reporting that **72 percent of U.S. adult cell phone users send and receive text messages.**

¹ *The Rise of Apps Culture*, Pew Internet & American Life Project and Nielsen, http://pewinternet.org/~media/Files/Reports/2010/PIP_Nielsen%20Apps%20Report.pdf

Numbers like 72 percent sound impressive but who's doing the texting? Who's going mobile? In short: Everyone.

Generation Y, defined as the generation of people currently between the ages of 18 and 27 and representing 82 billion consumers, continues to lead the way. Almost 90 percent of users in this age range use their mobile devices to share pictures or blog posts. Additionally, 51 percent of Generation Y in the United States report that they use their mobile phone as their primary access to the Internet². According to Convio's research in *The Next Generation of American Giving*, these mobile users aren't just surfing; they're taking action with mobile frequently cited as an emerging channel for Gen Y donors.

But mobile use isn't limited to younger users. Numbers vary, but Nielsen reports more than one in ten adults aged 55 and older are using smartphones³. While the numbers are small today compared to younger users, it's important to note that mobile use among baby boomers is growing in surprising ways. Many are using the phones to play games, and tablets like the iPad offer excellent examples of mobile devices that are empowering a broader audience of adults to access and explore the web in new ways. And remember: while this number may seem small, the quality of the boomer audience using mobile devices represents the technology-savvy, often well-educated and affluent who may be good major donor prospects for your organization.



Gen Y

Almost 90% use their mobile devices to share pictures or blog posts.



Boomers

More than one in ten adults aged 55 and older are using smartphones.



Gen X

13% have made donations via text/SMS.



Civics

50% were aware of text-to-donate campaigns for Haiti disaster relief.

² *State of the Mobile Web*, Opera <http://www.opera.com/smw/2010/10/>

³ *Who is Winning the Smartphone Battle*, Nielsen http://blog.nielsen.com/nielsenwire/online_mobile/who-is-winning-the-u-s-smartphone-battle/

THE NEW FRONTIER: TEXT-TO-GIVE & BEYOND

The growing prevalence of mobile in American society, along with the broadening audience for mobile technology like text messaging and apps, is great news for nonprofits. Users from all walks of life are becoming more familiar with mobile as a channel and willing to engage with the organizations they support from the palm of their hand.

How quickly are nonprofits and donors adapting to the new channel? Mobile giving is already outpacing the historically high adoption rates of online giving. In their recent report, “Real Time Charitable Giving⁴,” the Pew Research Center’s Internet & American Life Project discovered that one in five U.S. adults (20 percent) have made a charitable contribution online and that one in ten (9 percent) have made a charitable contribution using the text messaging feature on their mobile phone. That number is rapidly growing.

While standalone mobile campaigns have begun to produce impressive results for their causes, mobile can be even more impactful as part of an integrated campaign because of its ability to provide a relevant, on-demand connection. The mobile web is the most immediate channel available for engaging your audience, providing an “at your fingertips” way for volunteers, donors and supporters to organize their lives, access information and interact daily with the causes they care about most.

Now, bear in mind that harnessing the power of mobile as a *channel*—beyond text-to-give campaigns—offers nonprofits other benefits, including the ability to quickly and easily send messages to constituents, giving nonprofits a way to build an opt-in database that can be integrated with their overall marketing efforts. In other words, mobile is both a great fundraising channel as well as a great way to market to donors and prospects.



⁴ *Real Time Charitable Giving*, Pew Internet & American Life Project and The Berkman Center for Internet & Society at Harvard University. <http://www.pewinternet.org>

HAITI

Prior to January 12, 2010 little more than \$1 million had been raised via mobile text; however, in the aftermath of the devastating earthquake in Haiti, close to \$50 million was raised via mobile campaigns.

The vast majority of mobile donors (89 percent) heard about the campaign on television and half (50 percent) made their contribution immediately thereafter, for an estimated total of \$43 million. This unique phenomenon of “impulse giving” where donors admit to making a spur-of-the-moment contribution without much additional research has since extended to other natural disasters including fundraising to assist in the cleanup of the U.S. Gulf Coast following the BP oil spill and the March 2011 tsunami and earthquake in Japan.



With the success of mobile fundraising efforts for the Haiti earthquake and Japan tsunami in mind, many nonprofits look to micro-donations via mobile to support their fundraising efforts. However, for many organizations, the economics of text-to-give may not make sense without forging a partnership with phone companies and the sheer marketing muscle necessary to make most text campaigns a success.



American Red Cross Text-to-Give Haiti Disaster Relief Campaign:
Text 90999 to donate \$10
100% of donations went to Red Cross
\$800k raised in 24 hours
\$5 million raised via mobile by Day 2

MOBILE AS A CHANNEL

Ready to think outside the box? Consider the following alternatives:

Text Message Ticklers

Let's say you're an animal welfare organization. While you'd like to raise funds via mobile, it's not the right time yet – there's not an emergency in your community and you're reluctant to risk donor fatigue by using mobile to fundraise for your big yearly ask. According to recent research⁵, 85 percent of people read an unread text message within 15 minutes of receiving one – providing a great click-through rate and, in some cases, a click-through rate superior to what can be accomplished with email.



Why not use text to share some fun facts and successes about your organization? By sending just a couple of text messages per month, you can keep potential donors excited about your cause and keep your organization top of mind with supporters.

Gateway to the Telephone

Interested in moving donors up the giving ladder? Mobile may be a great place to start. Doctors without Borders, an Australian-based organization, partnered with a local carrier to send text messages to wireless customers asking if they could be contacted by telephone to contribute funds for Asian tsunami relief⁶. Sixty percent of SMS recipients opted to participate in the monthly solicitation with an impressive 50 percent subsequently choosing to enroll in the organization's monthly giving plan. While it may be difficult to navigate the ground rules around proactive outreach via text, using it as an "opt-in" for more personal means of communication may offer a new approach, particularly for organizations responding to crisis.

► Text and CAN-SPAM

Both the Federal Trade Commission (FTC) and the Federal Communications Commission (in its CAN-SPAM Act) have adopted rules that prohibit marketers from sending unsolicited text messages. For more information, refer to the FCC's CAN-SPAM guide: <http://www.fcc.gov/guides/spam-unwanted-text-messages-and-email>

⁵ *It's Required: Nonprofit Organizations and Mobile Marketing*, textopoly <http://www.textopoly.com/blog/2011/02/its-required-nonprofit-organizations-mobile-marketing/>

⁶ *Using Mobile Phones in Fundraising Campaigns*, MobileActive.org <http://www.mobileactive.org>

The Sweet Ring of Success

Mobile engagement extends beyond the text message – look for ways to harness media and entertainment content. For example, special ringtones can provide a unique and audible call to action reminding donors frequently of your cause and/or providing an opportunity to share your story with friends, family and coworkers. A children’s arts organization could provide a brief clip from a performance while an environmental organization may look to sounds from unfamiliar species to pique the interest of passersby. For example, the Marine Mammal Center offers ringtones for the Pacific Harbor seal, the Steller sea lion and humpback whale songs at no charge.

Engage Them On-the-Go

Simple calls to action work best for the mobile constituent. For instance, you could provide a mobile-optimized form to encourage them to donate or participate in a petition or other campaign component. If you’re a community organization, how about asking supporters to photograph and report activities in their local neighborhood using Facebook, Twitter or other mobile-enabled social media? In your call to action, it’s best to focus on one or two key actions and prioritize them so that one is clearly at the forefront.

If you’re giving away an asset such as a tip sheet, reference guide or top ten list, make sure it’s easy for your mobile constituent to download, digest and share. Share tips and easy-to-reference information on a variety of topics, from safe-to-eat seafood, to 16 seasonal suggestions to support a caregiver, or even a visual guide to local poisonous plants!



Once you’ve identified the actions you want supporters to take, keep the main call to action clear and succinct.

Empower Your Organization

Mobile is more than a powerful channel to engage supporters; it can transform your organization's development office and beyond if you know how to use the tools available. Think about a board meeting with major gift prospects for a Sunday brunch – why not give board members the power to log conversation information or understand the relationship between this prospect and others while waiting in the restaurant's parking lot? CRM systems like Convio's Common Ground® make this possible through easy to use mobile access. Coming from a successful meeting? You don't need to be at your desk to start running with the ideas that resulted. Common Ground allows you to use your mobile device to assign tasks to various members of your staff to keep the positive momentum going. Or, while you're out delivering programs in the community, use your mobile device to track client progress in your CRM and share the exciting news through social media.



Common Ground allows instant, mobile access to your donor database. Record activities, access donor contact information, and even assign tasks to staff.

IS MOBILE RIGHT FOR YOU?

So you're thinking about adding mobile to your outreach strategy.

How do you determine if it's right for your organization?

The best way to ask yourself if mobile is right for your *organization* is to ask if mobile is right for your *audience*. Mobile is no different from other forms of marketing and fundraising in that good strategy starts with your audience and works backwards from there – rather than starting with your organization and thinking of your audience only at the end of your planning process.

So with that mindset, let's explore mobile potential for your audience. Here are a few strategic questions to lead you to the right answers about whether to pursue a mobile program.

1 Who are your constituents and what are they like?

Mobile is all about reaching the right people, in the right place, at the right time. So first, think about your audience and where, when and how you interact with these people.

Think about the segment of people that you are hoping to reach with mobile. What are their ages? They most certainly own mobile devices, but how do they use them? Current mobile donors tend to skew slightly younger and are more tech-savvy than average donors. If your constituencies are older and don't have smartphones, it's important to come to terms with that – though mobile still may make sense if you're trying to reach a new group of supporters beyond your current base.

Now consider why and how this audience typically chooses to support you. What is the driving concern that binds people to your cause? Which types of appeals are they most inclined to answer (legislative alerts, time-sensitive campaigns, end-of-year appeals)? What times that you interact with them are conducive to inspiring action via mobile (for example, a walk or gala or volunteer day, when staff interact with individuals interested in learning more about your organization, or when your supporters are checking email on their smartphones)?

2 What resources do you have to commit to mobile?

Before delving into the exciting possibilities mobile has to offer, it's important to do a reality check. What investment can you afford to make in mobile? Take a moment to consider what resources you have in the way of:

- Time
- Money
- Expertise
- Staff

In considering your staff, ask yourself who needs to be involved at each stage of mobile – especially in the beginning. Who needs to be involved in the decision to embark on mobile? Who will be engaged in

implementation? Staff typically included in mobile decisions and implementation include: the executive director, technology staff, marketing and communications department members, program management staff, development professionals and advocacy staff.

Ideally, you'll want to include those people in discussion of the questions we pose here and the planning process that we recommend. The more collaboration you have at the start, the more likely you are to win and keep internal support and end up with a successful program.

► What do you want to want the audience to do?

What are your goals with respect to this audience? Are you trying to use mobile to:

Increase engagement levels?	Recruit volunteers?
Increase donations?	Transmit information?
Reduce costs?	Receive information?
Increase advocacy?	

Given those goals, ask yourself what actions make the most sense.

Do you want your audience to:

Donate via text?	Pledge to donate later?
Donate on a mobile web page?	Sign a petition?
Set up a recurring gift?	Answer a poll?
Give by voice?	Spread the word via social networks?
Receive important information?	Report a problem or something praiseworthy in their community?

3 How will this fit into your other outreach efforts?

You have lots of ideas about mobile; now we need to step back and look at mobile in the bigger picture. Your mobile strategy should not exist in isolation. It's important that you use mobile to supplement, reinforce and enhance your other forms of outreach. Mobile isn't a separate activity – it's an integrated part of acquisition, fundraising, cultivation and marketing activities. Think about both how you will leverage existing outreach to build a mobile list or presence and to drive results in other forms of outreach.

For example:

- **Online and offline donations:** Think about collecting phone numbers and asking people to opt-in for mobile alerts

- **Donor acknowledgement:** Consider mentioning mobile in your donor receipts or welcome packets and inviting people to opt-in – or sending thank-you texts to monthly donors via mobile
- **Emergencies:** When you do email outreach for disaster relief or other time-sensitive emergencies or special bulletins, consider including a mobile-friendly page link or text-to-give code since so many people check mail on their phone, and consider texting links to critical updates
- **Special events:** At special events, invite people at check-in to opt-in to mobile. Think about how you can enhance the event experience by asking people to text to donate or sign up for email or to visit a mobile-friendly page where they can take some form of action
- **Campaigns:** Consider launching campaigns via mobile and following up with direct mail or email appeals or vice versa
- **Social media:** Since many mobile givers are active in social media, it's important to integrate mobile and social outreach. Make it easy for mobile users to spread the word via social media, and include mobile opt-ins in social media content
- **Education:** Think about how mobile can help you disseminate information more effectively – for example, with a daily tip on pet care or managing your diabetes or an app for finding a nearby YMCA
- **General outreach:** Make sure any mobile information about your cause is included on everything, from annual reports to newsletters to press releases. You could invite people to text a short code to opt-in for mobile updates or emails

4 How are you going to measure your efforts?

Now let's turn to how to measure success in mobile marketing. You'll need to look at two things – your return on investment and your return on engagement. For example:

Return on investment:

- Cost savings (Did mobile help you gain more efficiency? Use less staff time? Consume less paper?)
- Donations from mobile or added donations or purchases from other forms of outreach that will be driven by mobile reinforcement (better online giving results, better direct mail results, more event attendance)

Return on engagement:

- New supporters (who may not yet be giving)
- Added convenience/immediacy for supporters in order to build loyalty to your cause
- Improved advocacy results
- Brand exposure, including whether constituents who receive and engage with your mobile programs contribute, volunteer and advocate at a higher level than those who just receive direct mail or visit your website

MAKING MOBILE HAPPEN

Now that you've asked yourself all sorts of soul-searching questions about mobile – hopefully with key colleagues – you have a checklist of the considerations you need for a go/no-go decision on mobile. If mobile looks like the right choice for your organization, your next step will be to choose the right mobile solution and create a plan for implementing it.

Take the time to clarify some of the things you're looking for to help narrow your options and articulate what you're looking for in potential donors:

Define your audience, desired actions and goals/objectives
Assess the resources you will commit and the anticipated return on investment (or return on engagement)
Collaborate with key members of your team on planning and design of the program
Identify how you will deliver, promote and support your mobile efforts
Measure and analyze your mobile program
Ensure your existing outreach and engagement systems are prepared for the introduction of your mobile program

Next, it's time to evaluate potential solution providers. There are two main questions to keep in mind:

Question 1: What type of vendor do you want?

Mobile technology vendors come in all shapes and sizes. Some specialize in particular solutions, while others focus exclusively on nonprofit organizations, while still more can provide a complete solution where mobile is just one piece of a much larger system.

Think about what type of mobile capabilities you need to create the constituent experience you're seeking. Is it event registration? The ability to make donations on the go? Multimedia offerings like free ringtones or an app? Are you only interested in mobile functionality for your staff, for them to be able to make real-time updates to a donor record or assign tasks from the road?

Question 2: How will you qualify your vendor?

You've got a short list of people whose work you admire – maybe you encountered them online, found out about them from a board member or met them at a local trade show. Whether you're searching for a fully integrated solution or for support to help your in-house IT team, be sure to consider the following:

- **Industry leadership.** Make sure the vendor has experience meeting the unique needs of nonprofit organizations and understands the challenges of marketing messages to donors, supporters and volunteers specifically.
- **Expertise.** Confirm that the vendor has experience launching the kind of mobile programs you're interested in, along with analytics, strategy, creative and launch.
- **Disaster recovery.** What happens if the server crashes? What if there's high traffic from a matching gift opportunity and you want to send a text alert to constituents or create a mobile form on the fly? Asking about stability can be particularly helpful if you're evaluating a cloud-based mobile solution for your team versus one that's web-hosted or installed on computers in your offices. Ask how quickly it can get back into service. If they're industry leaders, they'll have automatically secured your information and you won't even notice the downtime.
- **Pricing.** Keep in mind that you often get what you pay for. Make sure that the product and/or service you're purchasing includes key attributes that will make you successful like support, training and ongoing development to keep your mobile investment ahead of the curve.

Making the most of your mobile channel is similar, in many ways, to engaging your constituents online. Whomever you chose as a partner has to be at the top of their game, able to keep up to date with marketing technologies and capabilities that are evolving rapidly. The right mobile partner has a broad set of capabilities combined with a deep understanding of each primary mobile channel. A vendor with a breadth of capabilities, in mobile and beyond, ensures that your organization's technology not only works well, but helps you achieve your desired end result and is a pleasure for anyone on your staff to use.

ABOUT CONVIO® COMMON GROUND®

Convio's Common Ground is an all-in-one fundraising and donor management solution designed to help nonprofit professionals like you get your job done quickly, easily, and with more flexibility than you ever thought possible. It's a common ground for information about all your constituents: donors, volunteers, new contacts, and just about anyone else who supports your mission.

With robust donor database functionality, a flexible, easy-to-customize interface, online fundraising, reports and tools, Common Ground helps your organization grow your base of support, deepen relationships and raise more money.

To learn how this open, cloud-based solution can help shift your focus back to your mission (not your technology), come explore Common Ground: www.commongroundcrm.com

ABOUT NETWORK FOR GOOD

Network for Good is a nonprofit that makes it easy for donors to support any charity, anywhere online and that helps nonprofits raise funds for their missions through simple, affordable and effective online fundraising services, including donation processing and email outreach tools. To foster continued growth in online giving, Network for Good also provides free training to nonprofits on online outreach through www.Fundraising123.org. Through partnership with corporations, Network for Good enables cause marketing initiatives and charitable giving solutions on company websites. Network for Good has processed over \$600 million in donations for more than 60,000 nonprofits since its 2001 founding by AOL, Cisco and Yahoo!. For more information, please visit www.networkforgood.org.

©2012 Convio, Inc. All rights reserved. Convio, the Convio logo and Common Ground are trademarks or registered trademarks of Convio, Inc. All other names are trademarks or registered trademarks of their respective owners. V02.13.12