



SEPTEMBER 27-28, 2018

THE NOTES

PRESENTED BY

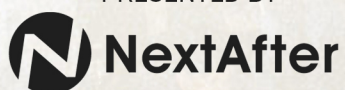


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How to Use the NIO Summit 2018 Notes

In this notebook, you'll find all of the notes on each main-stage session from the 2018 Nonprofit Innovation & Optimization Summit. These notes are not all encompassing, but they're meant to help you keep the most vital information top-of-mind.

The best way to review these notes is in conjunction with the speaker's slide decks*. In each section, you'll find **a link to download the slide deck** for that specific speaker. Please do this first. Then, the **notes that follow will help fill in the gaps** where the slides need additional context or information.

In addition to these notes, videos of each session will be made available soon. When they're ready, you'll find them at www.niosummit.com/2018-recap

* 2 speakers did not give us permission to share their slide decks, but the notes should help you recall the key points for those presentations.

David JP Phillips: The Magical Science of Storytelling

Get a Summary Handout of David's Session at: www.niosummit.com/2018-recap

Storytelling increases value. A reseller called an author and said he had a "significant object." "Can you write me a story?" It was a plastic horse's head he'd bought for \$0.99. The author wrote a fantastic story about his mother's father, who lived amazing escapades in Paris while studying there. The horse's head had been left in the Louvre, dropped from the Eiffel Tower, etc. He commissioned 200 authors to write a story about 200 different objects he'd purchased. The horse's head sold for \$62.58. Can anything else increase value like magic? He purchased the 200 objects for \$129 and sold them for \$8000. The only difference was a story attached to the object.

The power of movies: How do we feel after we leave a James Bond film? Many of us walk out of the theater feeling like Bond, wanting to dress like Bond, walk like Bond, be Bond. We walk by a nice watch in a window display and suddenly find ourselves wanting to buy it. \$11.5B is pushed into product placement in movies because people buy it. How can we be so naive?

Why are we putty in a storyteller's hands? The psychologists Melanie Green and Tim Brock argue that entering fictional worlds "radically alters the way information is processed." Green and Brock's studies shows that the more absorbed readers are in a story, the more the story changes them. Highly absorbed readers also detected significantly fewer "false notes" in stories—inaccuracies, missteps—than less transported readers. Importantly, it is not just that highly absorbed readers detected the false notes and didn't care about them (as when we watch a pleurably idiotic action film). They were unable to detect the false notes in the first place.

And, in this, there is an important lesson about the molding power of story. When we read dry, factual arguments, we read with our dukes up. We are critical and skeptical. But when we are absorbed in a story we drop our intellectual guard. **We are moved emotionally and this seems to leave us defenseless.**

The brain is the home of Instincts, emotion, and logical reasoning. But also, judgement, which is ruled by the orbitofrontal cortex. How and whether we accept what someone is saying and for what reasons.

The most important takeaway from this presentation is: Emotional investment. The more emotionally invested we are, the less critical we are. Consider cheering for an abysmally bad team who you logically know won't win, because they're "your team." Or the greatest example: falling in love. One moment you are mesmerized by your lover chewing an apple. 13 months later, as you biologically fall out of that state, the sound of them chewing an apple drives you nuts. **Storytelling is more powerful than any other tool available—it's like a short romance, due to the hormones it produces.**



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Dopamine - Create dopamine through storytelling. This is crucial for every single human being you have contact with. Story about being invited to an exclusive meeting in Stockholm, teaching experts in the field, positioned as the expert of experts. Receptionist asks, "Are you ready?" Meeting will be with 3 other gentlemen, ex-military, majority owners of the company, and none of them wants the training. And then she said...

You create dopamine for other people through storytelling, suspense, and cliffhangers.

Oxytocin - The bonding hormone. Story takes place on a playground, a man swinging a 4-year-old child, screaming with joy. After running around, he puts his head on the man's lap, exhausted. A bicycle goes by; the boy says "I'd like to have a bicycle." The father says, "Since mum isn't with us anymore, I'll do my best." The boy was so tired, the father calls the hospital for a blood check. The doctor calls, and says "you should come in." Looks him in the eye, says "I don't have good news. Your son is dying, he has 6 months left." Saying that to your child is the most painful thing on earth. The boy says, "Does that mean that I'll see Mum? But won't learn to ride a bike." Due to people like you and an experimental treatment, he is now alive and well. **Build character through empathy setbacks.**

Several studies show that oxytocin can increase generosity by up to 200%. Nothing is as powerful. At some time in your life, you have been rooting for the bad guy in a movie—because of effective use of oxytocin by the screenwriters. IKEA lamp commercial—we can have empathy for anything or anyone.

Endorphins - Bride gets the giggles. Laughter. Critical thinking goes down. Quality of jokes goes down as laughter escalates.

Adrenaline + Cortisol = "Devil's cocktail."

Oxytocin + Dopamine + Endorphins + Serotonin + Testosterone = "Angel's cocktail."

Endorphins are our response to external stimuli.

Cortisol - Spikes of cortisol produce irritability, lack of imagination or creativity, bad decision making, unwillingness to consider new ideas. If your customers are high on cortisol, this is how they'll behave. This is why it is so vital as marketers to appeal to the other hormones and the qualities they produce when we are communicating to our audiences.

Storytelling creates the cocktail of substances and feelings that drive generosity. It is the most powerful tool there is.

Q? What are your thoughts on video vs. written copy in storytelling?

Written stories are incredibly powerful, as we know from books. A charity project called The Exodus Road has a brilliant example of video.

Q? How do we know our stories will reach our audiences?

Biologically humans are similar, so we can generalize efficiently, to about 90% accuracy. As you saw, people will have different associations, different responses to the same story.



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Josh McQueen - Changes in Giving and Volunteer Work for Nonprofit

Get the Slide Deck At: www.niosummit.com/2018-recap

Every generation is the same size, when measured as an 18-year span. The same amount of Americans have been born annually since 1952.

According to a 2009 study, Boomers were not shown to give more as they aged, as compared to Gen Xers. The Silent Generation was giving tremendously. Comparing to 2018, giving has mushroomed. Gen Xers are beginning to look like Boomers (previous increase, followed by a plateau) while Millennials also increased, giving more than Gen X gave at a similar age.

Across generations, we see a similar trend: Giving increases until age 35-44, plateaus through age 45-64, and rapidly increases through age 65-74. This is largely due to phases of life and the other financial demands that arise as kids go to college and legacy plans are made.

Two important factors in giving are an increase in disposable income and net wealth. In 2008-2009, people felt less rich. We often assume that giving is based on the need, but this is not a donor-centric approach. **When we're faced with economic pressures, we don't give as much.**

80% of estate plans are created during what is now the Gen X generation, late 50s-60s. So we could be receiving a huge influx of income from this group in the near future.

Millennials give to more nonprofits. Twice as many as Boomers and 50% more than GenX; 12 different organizations on average. When engaged with this many causes, it isn't as hard to add more causes. It lowers the bars of acquiring. But what are the chances of retention and loyalty over time?

Boomers/Silent Gen respond to direct mail much more. Retail is a common denominator. In-Person performs best for Gen X. Email is stronger for GenX/Millennial. **Millennials push your message farther by sharing.**

The number of people who volunteer is slightly less than 5 years ago and percent of population is significantly less. **Amount of time is more precious in many ways than amount of money.** Millennials are more willing to volunteer, Gen Xers take on more projects, and Boomers are spending the most time on the fewest projects.

What role do your volunteers want to play? Millennials want to lead, Boomers want to follow. But generally, these age groups are given positions contrary to that. If they do not feel engaged and

inspired by their role, they are less likely to return. Millennials are full of enthusiasm, they want to make a difference in the world, and they bring technological savvy. **In your efforts to recruit and retain volunteers, ask questions you'd ask a high-level donor.** What kind of role suits you? Do you have the time? What would you like to do? **Volunteers are often the best donors.** Volunteers are more likely to donate to their cause. Don't be afraid to ask your volunteers to supplement their efforts with donations.

2026 Projections:

If they follow previous patterns, Boomers are expected to increase from \$107 to \$134 billion in giving, so there is high importance in retaining these donors. Gen X is not projected to increase hugely. Millennials will continue steadily climbing.

- Boomers will become the most generous generation ever.
- Gen Xers will increase their giving by 13% and make 75% of first estate plans. As they begin thinking about their legacy, how can you talk to them in a way that encourages them to include you in their plan?
- **Millennials are easier to acquire but potentially less loyal.** Reaching/attracting isn't the issue—getting them to commit time and money is. Here, the focus is on getting repeat gifts.
- Media: If you're not thinking balance, you're not thinking correctly. Have a balanced portfolio, because different groups respond to different mediums. Have a group internally that meets regularly about acquisition efforts and whether you're retaining/nurturing long-term donors. Think across platforms and generations, as well as life stages and their impacts.
- Giving will increase—9% total by 2025, with Boomers up 25%.

Q? Has number of organizations given to also increased over time?

Yes. Gen X increased from 7 to 9; overall rapid increase in younger generations giving to many different organizations.



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Jamie Blomquist: Aligning Strategy and Spend with Changing Behaviors

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The demands of the donor experience have changed. The way people find causes has changed. Giving across every type has increased year over year, even over last year. This is reflected in search demand. The industry is growing overall.

Between 2014 and present, branded searches (searches for specific organizations such as "Red Cross," etc.) are flat/down. But generic searches ("how to help the refugee crisis") increased by 20%. Considering these changes, how do we acquire new sponsors and how do we foster brand interest/affiliation?

Giving is deeply personal. Who are you talking to, with what message, and what experience are you delivering? The majority of giving during this period didn't come from who you'd expect it to. It came from ages 18-34, at the bottom 50% of household incomes. This group values transparency, creativity, storytelling, connection, savvy, and **results over institutions**. In the modern age, reach is plentiful while attention is scarce (compared to say, the '60s, when reach was scarce, but attention was plentiful). We are having an individualized and thus fragmented experience of consuming information. **This should be reflected in personalized donor experiences.**

Younger age groups are more likely to support causes indirectly (such as through participating, volunteering, or fundraising for friends). 95% of them don't care if they get a thank you note, so save your paper. **2/3 of those who care about a specific nonprofit formed that loyalty before the age of 35.**

75% of donors start by researching online, and half of them visit the sites of multiple organizations before making a donation. Do you show up in search results? Do you show up with an appropriate message?

Mobile is important—54% of queries and 66% of clicks come from mobile. This suggests that the phone is an action-oriented device, but it's often not treated that way. CPC is half on mobile. Nomophobia—the fear of being without your phone. It takes an average of 26 hours to report a missing wallet, but only 56 minutes to report a missing phone. And yet—most donation pages are not mobile-friendly. Imagine having to pull out your credit card on a New York subway as opposed to tapping a PayPal button. Over half of mobile users will abandon a mobile site if it takes more than 3 seconds to load. **The average site load time of the organizations at this conference was 12 seconds.**

Spend your money where your donors spend their time. Marketing budget allocations are mostly copy/pasted from one year to another. Rather than falling into this pattern, ask yourself, what are you actually trying to achieve and are you using the correct channels? Direct mailing is really great for brand awareness, but not so great for driving donations. Online can be both. A 2018 study confirmed that more than half of adults 22-45 consume no traditional TV whatsoever; the TV numbers reflected in the graph are supplemented by streaming services for this reason. **Response rates increase when marketing channels are layered.**

We have very little tolerance for a poorly targeted ad. Not smart or targeted marketing costs the industry \$93 billion. Example of the pile of direct mail pieces Jamie received from organizations she has no relationship with. She was a longtime Sierra Club supporter but retracted her support when they sent out fancy paper calendars and mail pieces (not aligned with their value proposition of environmental preservation). Think about how your various types of marketing are being received by your donors. **Make sure your message is consistent across channels and that it is tailored to who's receiving it**—you wouldn't keep introducing yourself to someone you're already dating.

Google audience products:

Customer match uses first party data, such as your uploaded list of recently lapsed donors, to create a targeted list. Could also use this for geo-targeting by uploading a list of all donors and filtering for those in Texas to market a local event. Great for targeting specific donors online.

Similar audiences is used to “find me more people who behave like this.” Great for prospecting new donors based on those you already have.

Video - Even the shortest 0:06 bumper ad can tell a story. Video can be very powerful even without large budgets. It bridges the gap between awareness and action. **“Donation cards”** are a great, free feature to make video actionable—they are pop-ups that appear after watching a video to prompt viewers to donate to that cause. Bridge YouTube from awareness to performance by including a call to action to drive someone watching a video to click through to a website where they can take an action. **Make your video personalized and relatable for your viewers.** Example of Save the Children Syrian refugee crisis video piece—first version produced from the point of view of a little girl in London; second version from somewhere that looks like Aleppo. British version receives massively higher views. NPR asks, “are you more sympathetic because she's British and not Syrian?” Can you use this to make your cause feel palpable and personal?

VR can also be a powerful tool to create empathy and understanding, such as allowing someone to virtually experience what it's like to have to walk into a family planning clinic for services.



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- There are different cohorts of value, so allocate your resources appropriately.
- Data is your greatest strength. Use it.
- Create journeys for all of your audiences. Build a funnel for each.
- Scrutinize your CPA and CPC numbers. What do you leave on the table? Does that maximize the business you can drive?
- This industry can't afford any more inefficiencies.
- No more copy/pasting marketing strategies. Think about how your donor base has changed and will change; make your marketing strategies relevant to those things. Look at historical plans and change them to anticipate the future.

Andy Crestodina: Search, Conversion, and Content Optimization

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How to turn more of your marketing into outperformers both in traffic and conversion. Improve your mouse traps, and use better cheese.

Traffic

We often see short spikes in traffic after a successful post, but whether we get that long tail depends on how well it was initially promoted through search. Brand awareness is the sum total of all visits to all of your pages. If your website was a boat, adding key phrase-focused optimized pages is like adding sails. Every page is a chance to catch traffic like sails catch the wind. **Keep working at search and email or you don't get traffic.**

The fastest way to get more traffic from the stuff you've got is to see what phrases you're currently ranking for. Use the "Advanced" settings in the slide to find out "What phrases do I rank for high on page 2?" If you're ranked 11+ for a keyword, you're on page 2. And that's your lowest hanging fruit.

An "accidental ranking" is when you're ranking for a term that doesn't actually appear on the page. You can increase traffic by a lot just from improving the page's relevance for that phrase. Go back to the page use ctrl+F of the term to indicate relevance. Answer the best questions related to the topic. **Make it the best page on the internet for that topic.**

There's often greater value in updating an existing piece than creating something new. You'll typically see massive traffic increases after a page is updated.

Conversion

Your call to action should be visually prominent; stand out. If you're offering content like a newsletter, what do they get and how often? Adding the number of subscribers appeals to conformity bias (join xx,000 other donors). If you don't have quantity, use quality—like a short testimonial (this can be from your 1 subscriber, your mom).

Link your best cheese to your best mouse traps. The page that gets the most traffic isn't necessarily the same as the one that drives the most donations. After analyzing individual pages for traffic and conversion as shown in the slides, create an internal link from your top traffic post to your top conversion post.



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There's a huge opportunity in nonprofit for documenting your mission statement. Knowing what you're doing and why is shown to convert to success—organizations who document their mission statement are 3x more likely to succeed.

Q? Is it better to update existing content or continue trying to create new content? Which is more effective?

Updating existing content is a faster way to get better results, but there is a point of diminishing returns. Existing content gives you historic data, tells you what works and didn't work. But you also need to inject new data. There's a limit to the optimization tactic, but do that first, and a lot of times you'll get ideas for new stuff by looking at the data and seeing what's working.

Q? How do you sell this within the organization?

There are always going to be questions and ideas from the organization that you need to defend against. Turn every one of them into a hypothesis, and consider them among the other options. Once you've chosen the decision you'd like to make and you get pushback, have data to back it up. They say "Don't bring an opinion to a data fight." Unless it's the HiPP0 (highest paid person's opinion). If it's data against data, the best data wins. Data tells stories.

Q? What's the best SEO tool to start with?

Analytics is free. Answerthepublic.com is free. Moz, SEMRush, tools like that are helpful if you have the budget, and are still cheaper than marketing automation.

Brian Davis: Going Big - Making the Most of a Winning Appeal

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During the 2011 Herman Cain campaign, which Brian ran fundraising for, at one point while each candidate was receiving their spot in the news cycle for a moment, Herman made the front page of the WSJ. Imagine that everybody in the world is talking about your campaign—you've got saturation coverage. What do you do with it?

This was the perfect environment to test email list rentals. **There's no better way to find new emails and grow a house file than through email list rental.** Acquisition is important—without it, your list will wither over time.

There are misperceptions of shadiness in the list rental business, maybe you know someone or you tried it before and lost your shirt, or maybe there's just ambivalence in including them in your mix. But there are many legitimate ways to get your content in front of someone else's audience.

Be willing to test and fail with more than one campaign and more than one test before you decide whether list rental is successful for your organization. Spread your spend across a number of lists, rather than all in with one list. Track all of your data and compare it to other lists, other creative, and other audiences. Don't just track email metrics, but most importantly conversion rates on landing pages.

When seeking out list owners, ask yourself, "who would have an audience that's passionate about what we're passionate about?" How do you structure ongoing relationships with those list owners? Can you negotiate a longer term deal than just a one-time send? Could you swap lists? Is there another organization in your field that you could work with?

Don't just stop with one email campaign. Have a program set up that you run over time with a specific goal to grow your house file. Sending an email to a new audience is like a blind date. **Once you acquire a new donor, how do you work them through a process to get to know you as an organization?** If you don't have that prepared before you send the very first email, what's the point?

Q? How often should you be scrubbing your email list for inactive subscribers?

On a frequently mailed file, if you haven't opened in 3-4 weeks you'll fall off of our engagement list, and be put on a track to reengage. So for an active file I'd say 3-4 weeks but it could be up to 6



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months, there's no one answer to frequency. It's easier to determine when the expectation is set with the audience, like the opt-in that says "biweekly."

Q? List rental can feel like buying watches on the street in New York. How do you evaluate whether an opportunity is legitimate?

A lot of it is relationship. Do you know the list owner? Have you talked to people who have worked with the list owner? Have you seen the emails they're putting out? If not, subscribe. Work through intermediaries who you trust.

Jon Powell - 5 Unusual Levers to Help Your Emails Get Read

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Learn how to create an expectation that your readers can't resist and an impression that you have a conversation worth having.

Appealing to the topic angle: your work is to figure out the most relevant, urgent, and important angle(s).

Appealing to the conversation: Setting an expectation that the conversation that is about to occur is or will be important.

5 Key Levers:

- **Mystery:** Being less specific or creating cliffhangers in your subject lines intrigues the reader to open. Taking just enough out for them to want to know more. Don't take too much out, or it won't make any sense.
- **Utility:** People often come to email looking for an escape or a dopamine hit, a quick win. Offering something of obvious benefit to the reader increases the chance they'll engage. Sometimes, utility can beat mystery, especially with the power of "free."
- **You:** Achieving the effect of personalization/humanity through the word "you." But using the word in your subject line isn't as important as conveying the feeling that the message was written for your reader personally.
- **Recency:** Using time-relevant terms like days of the week, tonight, tomorrow, etc. to imply that your email covers something recent or newsworthy.
- **Authenticity:** Avoiding cliches, jargon, and marketing-heavy language. Read it out loud. Use phrasing that appeals to personal connection.

Q? Many of your subject lines are super-short. Is there a length they should not exceed?

I've seen long subject lines hammer short ones, it all depends on the principle you're activating. Typically the best performers are going to be shorter, but if you know your audience and topic, longer can outperform in both opens and clicks. Depends on which of the two methods you're utilizing.



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Q? In terms of appealing to the conversation, doesn't that imply a certain level of relationship with the subscriber?

A lot of times you're emailing people on your list, so yes the relationship helps. Sometimes you find you need to send something like this to front lines, but it's also used in list rental situations. You have to test it, but I've seen it work in all areas. You certainly don't want to give off the wrong impression; start off with your own audience and lean on that, test a little bit and then reach out to rented lists or cold audiences.

Amy Harrison - Copy That Crushes Objections and Gets Donations

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Give people a reason, but also persuade them to listen. People put copy last because there's no equivalent of a hot, sexy marketing tool for copywriting. Many times, an unsuccessful marketing campaign falls short because of the content, not because of the reach or conversion rates.

Why is your ideal donor saying no?

- **See** - Trying to be too clever, too passionate, too persuasive, over-engineering words. Be direct, concise, and memorable. You can still convey passion this way. Say what you're thinking. **Being direct with what you want increases conversion.**
- **Believe** - Overcoming our donors' false beliefs preventing them from giving by anticipating them and addressing them in our copy. Let them know that they're important to the cause, and that their continued support is important.
- **Desire** - Focusing on your donors' desire rather than your desire. Shifting focus in food parcel campaign from items included to what it enabled the family to do and feel.
- **Trust** - Making campaigns more personal to anticipate distrust of organizations. Distinguishing yourself from other doubts or organizations without criticizing.

Q? Is there ever an appropriate time to use negative copy?

Yes. We are psychologically programmed to avoid risk more than going toward positives. That doesn't mean scare-monger, but to communicate the risk of not taking an action as long as it doesn't feel manipulative. You're creating a cause for positive change. If you're not there, something bad might happen. The problem can get bigger. But pull it back so it doesn't feel impossible. This is what could happen, but we have the power to stop it today.

Q? Sometimes copy comes last. How can we ensure that copy starts in the messaging process?

It's not easy to do, and it differs from one organization to another. It has to start at a higher level. What are our objectives? What do we want? Who do we need to help us do that? How do we build a message around them? When we start with the message, then that will inform the strategy. At the moment it feels better to have the strategy on paper, but when you don't know what you're saying, it could be arbitrary content that people say no to again and again.



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Karl Gilis: Why You Fail as a Digital Marketer and What to Do About It

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Our gut feelings and preconceived ideas as marketers are not always aligned with user behavior. Marketing pieces that seem optimized for us often are not for the user.

The principle behind video backgrounds and sliders not working is the same as yelling at someone to pay attention to you—it doesn't work. That's why mid-content text ads often outperform banner ads.

The page fold is a myth: People do scroll, but...it depends on what they see above the fold. When a page included an auto-play video, the most often clicked button was the pause button. What people see on first reaction is very important to how they will behave on the rest of the page.

Think about how you can do a psychological build of a page versus a design change. Changed carport bullet list to benefits to the user versus features of the carport. Brings the visitor into “the yes mood,” where they are more willing to make a buying decision. Talk about the situation of your visitors first. We don't like people/pages with the “look at me” syndrome. Make it about them.

Words like “subscribe” and “submit” are impersonal. Change to a specific benefit. Get Started --> Save Your Marriage Now. Big red “DONATE NOW” buttons communicate to the donor, “Give me your money now.”

A two-step donation process can leverage the psychological principle that people like to finish what they start. Changing the donation process to two steps increases donations and recurring donations.

Text-heavy addresses the objections of the user, which is why it was the more effective page for making an appointment.

If designers don't understand the importance of words, they're not designers; they're decorators.

Example of gas stations hiding the “find a station” feature in favor of unrelated copy, ads, or promos for food/beverage products.

How do you users want to use your website? What do they need from your website? The primary goal of your marketing is to make your visitors happy.



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Q: If you have “Donate now” on your donation button what is another option for copy?

It depends where you are in the process. A lot of people go for the goal too soon. “Support us” could work. It depends on the organization. Try not to be focused on the end goal. Support [name] or [cause]. “Save the puppies.” Most people are more willing to donate when you give them some context and explanation.

Marie Vaino: 6 Building Blocks for Optimizing Low Traffic Sites

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Low traffic is a controversial topic. We often think that optimization equals testing, but in order for test results to be valued, the sample size must be big enough to be relevant. It would require an enormous amount of impressions to make a small-level test statistically significant. Testing is only part of optimization; the last step. To make a larger impact, the sample size required is much smaller.

Measuring is crucial for low traffic because gathering data takes time, and you won't have to wait 3-6 months to have the data to analyze if you start measuring now.

Human evaluation should always come first in the optimization process—you wouldn't go under surgery without having a doctor look at you first.

We can only focus on certain areas of a site at one time. Make sure that they are not competing with each other.

Leverage existing models and standards rather than trying to get creative which can confuse your visitors. The fact that users spend most of their time on other websites shouldn't drive you to look at your competitors for answers. You need to get to know your visitors.

When gathering qualitative research such as a survey, it's crucial to do it immediately, as people quickly forget what motivates their decisions. Ask survey questions same-day, or else their online experience won't be top of mind.

After 3-6 months, building block 4 only becomes possible once we have collected a critical mass of data to see significant trends. Beware of seasonality—if your organization is seasonal it will take at minimum of a year to collect substantial data. Analytics tells you where to look; mouse tracking data tells you where on the page to look.

For testing there is no hard and fast rule, but generally you should be looking for about 500 conversions per month before you test. Implementation cost and uplift potential determine priority. Cost matters way less than potential. Don't spend an hour setting up a test that you'll never be able to validate. If test uplift is 5%, you'll never see a result. If you're willing to spend a whole month to set up a very significant test, you can measure a much more valid test result.



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There's no room for noise in your data. With low traffic, tests need to be big enough to enroll all visitors and not just some. 4-6 weeks should be the maximum timeframe for a test. If something is underperforming, don't kill it too early but don't let it run too long. 2 weeks is a good ballpark for checking and deciding whether to proceed.

Deciding whether a test was successful when the uplift was small: were any micro-goals reached? (Such as clicks on the button versus conversions alone.)

Sacrificing statistical significance doesn't improve the results of your test. More powerful hypothesis for the sample size is the better way to go; traffic needed isn't reduced significantly enough to validate it.

Q? Is there a formula for sample size?

Yes. Search "optimize my sample size calculator," you just input your target conversion rate, the uplift for your hypothesis, and it's usually already programmed with the significance at 95%.

Brady Josephson: The State of Recurring Giving in 2018

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How do we make donors feel something to boost oxytocin and increase giving? Adopting allowed empathy to take on a whole new meaning for Brady. Moving past what someone feels and what they're actually experiencing leads to understanding. Provide solutions. That's like a secret weapon.

Donors are unintentional liars—they don't do what they say or think they do. This is why testing is so important.

Recurring donors give more total over a year than a one-time donor. They also give for longer. Most first-time donors fall off (only 23% retention rate). When these are combined, lifetime value increases drastically. These is even more true for small and medium-sized organizations.

Giving equal increments over time versus your entire donation at once is much preferred even though it's the least efficient way to give. Maximize happiness by giving smaller, recurring amounts. Recurring giving & subscription-based services are growing, especially with younger age groups, so people are predisposed to this type of model.

Recurring giving as a strategy is often overlooked in favor of acquiring new donors. Buy-in is crucial to this. Does your donation flow/experience tell the user why they should give recurring gifts? How are we catering our marketing for recurring donors? Leveraging the phone is important, especially on the stewardship side, retention, making donors feel good about their gift. Recurring donors typically receive less appeals and cultivation, and more direct mail. Over time they get thrown back in to the regular mix. There doesn't appear to be a longer term segmentation strategy for high-value donors.

If a credit card lapses, the overall objective of LTV is affected. How are you recovering lost or lapsed cards? Lack of human systems/process is causing massive losses. Do we know when cards are lost? What do we do about it? If we're not reaching out, LTV goes away. Are you offering recurring gifts as an option? Most organizations are not.

Cognitive momentum = Once we take an action, we're more likely to take another action. Moving to the left or right is easier once we're already moving forward. Reconfirm the value proposition by asking "would you consider?" rather than asking/telling you what to do. Include benefits to the user by becoming a recurring donor. They've already said yes—they're committed and interested. "This might be an even better way to make more impact for less money today" is essentially the value proposition of a recurring gift.



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EFT/bank transfer payment options are better for retention, yet most organizations are not offering this as an option. If you don't want a credit card to go lapsed, don't set one up in the first place. There's no difference in overall conversion when this is offered—one-time donors still proceed.

Donating to our own organizations is a great way to gain experience, empathy, and understanding from your donors' point of view. Every quarter is the recommendation. This can also help you catch broken forms and other UI issues.

Recurring Giving Case Studies

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Amy Zhang

You should keep testing and not give up just because something isn't working right away. For charity:water, brand is as important as project effectiveness.

"The Spring" launched in 2016, started with Facebook ads to about 5000 existing monthly donors. The goal was to double that number and continue to grow it in a sustainable way. It took about a year to be ROI positive.

Facebook is one of the few places online to reach highly targeted audiences where they already are, and where you don't need a high volume of traffic to see significant results. It's typically harder to get an action before a user has engaged with your site, but that's not the case on FB. People are more willing to consume different types of content while already browsing their newsfeed.

Existing donors and retargeted audiences were less likely to convert to monthly, perhaps due to feeling as though they'd already taken action. However, retargeting converted the most one-time donors.

If you have a list of people who've already become recurring donors, "lookalike" audiences targeted based on Facebook's algorithm to be similar to existing list were highest converting, but more expensive per impression.

Top-performing video was 20 minutes long. Best practice is under a minute, but documentary-style tells story and converted highest. The "inspirational ask" or "softer CTA" worked better versus the direct ask. "You can't buy time but you can give it" for holiday giving.

Mobile converts lower, but that's where people are. Many times we look at the desktop version of ads more, but more and more, mobile is where we need to focus our efforts.

The Facebook feed and ads can get stale quickly; it's important to be refreshing creative, CTAs and audiences often to reach new people constantly.

Matt Monberg

Large audiences become more about numbers than people purely due to scale. We have to sit down and declare what we believe to be true about our sponsors. They want to visit your website to get



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something, not just to give something. We created a manifesto/"hero statement" about our donors to personalize them and the poster hangs on every cubicle, it's baked into our retention program.

Donors want to feel special, smart, and safe. Being ahead of the trend, variety, subscription boxes. People like feeling special. Retention program needs to focus on reinforcing that they've made smart decision by showing the impact they've made. Show that you're trustworthy with their funds. That you have the right systems to manage their information and make sure their funds aren't misused or misdirected, that we're going to process the transactions correctly. We built these feelings in because we respond emotionally first.

Where are you going with your donors? If you don't know, they won't know either. Writing out specific "Sponsor Journeys." How do we onboard? How do we cultivate? Chip-based credit cards changed the banking system. A lot of people don't know they're going delinquent because they don't know their credit card number has changed. Operations are very important. We had a 6-month hold-out on upgrade appeals for our onboarding.

Once we know where we're going, we need to engage sponsors on several dimensions. One: payment operations. What is your contact center saying when people call in and want to give a gift? If people stop giving how do you chase them? How many times do you retry failed cards? This is important because donors trust that you're doing these things anyway. Two: What you send by mail/email. We did a photo of the week campaign, one of most successful and liked we've ever done. We celebrate their "sponsorversary." Our longest tenured sponsor has 30.8 years. 2% in 20+ year range. Using the word "you"—it's their ministry, not ours.

During flooding in Louisiana, sent email to FEMA affected zip codes "Are you okay?" Offered to suspend payments for 3 months. 55% open rate. Some responded, "I don't need the help but thank you for seeing me."

We do 4-5 touches/year for upgrades, 16% of sponsors sponsor 2 or more children because every appeal for funds includes the option to sponsor again. #1 driver of retention is when you get to go visit your child. What drives your retention? We partnered with trips and business team to get more sponsors going on trips.

Are you offering new content that delights your donors and makes them feel good every month? What are they getting? Draw out the emotions that made them want to give in the first place.

Q? How many times should your recurring donors be solicited for one-time gifts? Should they be left out of campaigns?

Amy - Try to limit but for larger campaigns like world water day, those exceptions we ask to give again but try to reduce compared to one-time donors.

Matt - In a NextAfter study, we found that the highest impact was when someone made a gift as close as possible to when they first started sponsoring. If we could get an ask earlier, had stronger retention. If they gave in 2nd month, bigger impact than in 6-8th month. Maybe not doing favors by holding them to 6-month hold-out. Have to provide right ask, but potentially could be positive impact by asking earlier in sponsor journey.

Q? How much value prop is required for a recurring gift vs one-time with less expectation of commitment? Are people more primed to understand in a subscription culture?

In general, value prop doesn't change too much. Donor understands the convenience. Main value props remain the same, the brand remains the same. It's more about having more impact over time, able to stretch it out. At the core it's not too different.

Q? How old are your recurring donors?

Matt - On average, late 40s. Found that as donor base ages, being multi-channel is as important as it has ever been. When we conduct multichannel campaigns of any kind, better results than any other kind of campaign. Looking at demographics, surprised who is responding to which channels.

Amy - Historically skewed very young, 20s-30s. The Spring older demographic 40s-60s, especially because of Facebook. Tends to skew older, so ads were tailored to that donor base.

Q? Have you seen any difference based on age for expectations to get something every month?

Matt - Technology has made gratification instantaneous in our personal lives, not so with the sponsor and donor. Suffer from expectations that we can't control, that they will be fast. Acquisition side, moving away from paper forms and offering access immediately through text or an online form.

Amy - Not necessarily by age groups, but as we've grown monthly giving, we've done surveys of those who give, and we ask them how much correspondence they want to receive, often people will say they don't want anything but that's not always the case. We do provide monthly good news email, video series for monthly givers, and have got a great response. In the past we've done fundraisers, "dollars to projects," you know exactly where your money is going. It's harder to do that with The



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Spring, it's a more general pool. But we're exploring ways to make The Spring donors know which communities they're serving to retain a sense of where their gift is going. People want to see that.

Steve MacGlaughlin: Big Data, AI and Unicorns

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We always have emerging technology. Hollerigh proved the punch card was more accurate and economical, a faster way to do census.

60/60 Russian phrases translated by punch cards. When we talk to a mobile device, for the most part it understands. All of that came from the textile punch card. It's not perfect, it takes hundreds of years or decades, but we've taken a punch card for the loom to the modern age we live in today.

Most data we use in the world is unstructured (text message, comment on donation form, etc.) We need AI/technologies to make sense of it.

Value: most important "v". Nonprofit with most data doesn't necessarily win, it's the nonprofit that has the most valuable data. Misspelling a donor's name costs you in giving (less) and retention. Is it valuable? Yes. But do we focus on it? No single person is responsible for type-os. Where are all the places humans touch the data? That's where we're most likely to find mistakes. Data is a culture.

AI usually means bad things for humans in the movies. There's never a good result. My hypothesis is that that bad robots are actually a result of bad data. Usually portrayed as sci-fi but actual comp sci. AI is only as good as the data it's learning from. It learns from mistakes not because of self-awareness, but because of data.

Microsoft Office Clippy—crappy early AI. Sometimes early versions aren't exactly perfect. But he's the grandfather of Siri and Alexa etc. Where the world is moving to. The challenge is to think about it in 2 different ways.

Most AI doesn't do complicated things, but particular tasks (weak AI). Can be powerful as long as we manage expectations. C3PO not likely to happen in the next 5-10 years.

These technologies apply to commercial software, our mobile devices, Netflix, and now coming to nonprofit. Using data to look for problems. Data-driven prioritization of "at-risk" donors. More comfortable with these tools because of how we use them in our personal lives.

Where are we going? Different types of intelligence—music smart, book smart, seeing the same happen with AI or machine intelligence. Certain forms good at specific skills and some very valuable. Visual spatial intelligence is picture smart. The more data it gets, the smarter it gets. On your personal fundraising page, which photos perform better based on visual spatial intelligence?



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Verbal linguistic intelligence (word smart). Financial services text message interactions. Will get better at doing these types of things over time. Conversational.

If you don't have data how do you know it happened? Over time, nonprofit will start to mature in use of data. Today 95% get stuck at diagnostics. Most of us are all about dashboards and alerts. But a growing percentage are using more predictive, prescriptive, and even cognitive, which is really impactful because as you move up in maturity, technology does the work. It allows you to scale.

We're caught in a paradox. It's a science, but we're reminded of art. There's an art to advocacy, fundraising, programmatic work. Art or science? It's a false choice. So much is both. Including marketing. Sometimes one or another but how to use in balance. Art helps us communicate our humanity; science helps us do it at scale.

Q: Technology Limitations for Those Who Don't Have Investment:

Strategy comes before technology in the dictionary, so follow the same order. Always changing, new things coming and disappearing. What's the question or problem you're trying to answer? That leads you to what's the right technology. We have a tendency to say "I just need to find the tool," but we end up being disappointed. What's the strategy? Then, what's the tool for that strategy? When all you have is hammer, everything looks like a nail.

Q: What is most the most compelling insight you've found?

During book research, I talked to nonprofits, and I had this hypothesis in the beginning that if you had the right technology, good data, and smart people, you'd be fine. After doing more research, and talking to successful orgs, I can say that's true but it's not enough. You can have all that, but need more.

Organizational culture. Can be a buzzword, but does it fundamentally believe we can use to drive better decision making? Hippo problem. Versus looking at data. Less about technology as it is about culturally how do you think about using this and solving your problems? Willing to work together to do that? Bringing in people, external people, huge wave of people in math, computer science, etc. coming into nonprofit. People who can help you drive your mission.

Q: Top recommended resource for staying on top of trends?

For AI/machine learning, Benedict Evans has a weekly enewsletter.
Seth Godin, for balancing marketing and technology/ art and science

Michelle Hurtado: Connecting People to Causes With Free Google Ads

Sorry, We're Not Allowed to Share Michelle's Slide Deck

Ad Grants. Powerful way to convey message, and nonprofits often have vital information but not as many resources. 15 years running to give away ads for nonprofits.

Tips to get more out of online advertising whether brand new or seasoned.

Tracking goals: This is a key differentiator of online advertising. Every campaign should have a specific goal. Just to engage doesn't quite cut it. Set your goal and then measure the outcome. Specific measurable elements focused on moving you toward your mission. Optimize toward more meaningful goals, assign estimated values.

Classy has a way to link to Analytics to track donations. Track values, the weight of conversions.

Most grantees use last-click monitoring, which is the simplest but not the best. Position-based if not able to do data-based. Default conversion window should be 90 days, but capture all steps to relationship building to donate.

Maximize budget for as many conversions as you can. Assessing each click based on various factors, more complex in real time for better performance. Grantees can bid over the cap.

Keywords based on user experience, human curiosity. Search terms are the actual searches. Search is the question, your ad is the answer. Get them to a page that is as specific as possible to that answer.

Ad extensions - Sitelinks- two or three options under ad, specific cta to your website. Give users choice as to where they want to go. Hotline, call, visit, phone or location extensions. Choice can lead to more clicks.

Results surprise people. Not just connection but elements and the way it's laid out. Comes back with an actionable report you can print out and give to your developer.

Responsive to what people are thinking about. How can you be prepared for when things are top of mind for people? Can be set up and ready in 15 minutes when you have a relevant idea.



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Use successes in AdGrants and pick out successful keywords for a smaller paid account. Displays/image ads can increase search traffic. Try it in one region and see if it works.

Be able to talk shop with your agency. Guide to select/partner/evaluate with agencies. Along with certified professionals community with agencies dedicated to nonprofits.

Online marketing challenge--students trained in fundamentals 3-4 students run account for 6 weeks, see if worth long term. Events, webinars and short-form education on improving and optimizing your account. Online community forum.

Q: Monthly allocation to 5% has it produced quality results?

Average CTR 9.5%, so 5% meant to put a floor, substitute just logging into your account. New policies to guide people to take care of your account, should be checking regularly. Not comparable to a standard account.

Q: Best way to prevent competing with yourself?

They will never compete. Two completely separate auctions, just like search results and ads. Firewalls will never compete with each other.

Kevin Peters: Using Data to Tell a Compelling Story

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Data isn't wrong but it can be misleading. It takes time to run a campaign. Dec 31 higher amount of gifts.

Looking at numbers without population density or rounding up--affects credibility.

Discerning mind that picks out details like inaccurate scale, causes doubt.

Using data to tell the story you want to tell rather than representing it accurately. When people feel deceived they reduce their trust, fight or flight kicks in.

Not overtly trying to deceive, but human nature to overstate the problem to get people to support our cause, but can lead to reduced trust. If mission is really that important, no need to overstate it. Lay out facts because that's what builds trust.

Using data that doesn't matter. Facebook "fans" or "followers" aren't indicative of anything. Putting out a bigger number than what is representative of your impact.

Looking at the wrong metric - not send less email (low complaint rate), manage replies better (tons of new recurring donors)

Human data, or personality types, will make decisions in different ways. Use data to tell our stories in a way that appeals to the different types.

Impact is always better than big numbers.

Take donors on a journey when the medium supports it.

The more confusing it is, the less likely people will be to believe it.

Q: charity: water said that video was more impactful than copy. Tests that show the opposite?

Not every organization is the same. What works for one won't work for everyone. I've seen video hurt, 7 different experiments video had a decrease, but it was on a donation page. They're using it on social



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media, different platform for different purpose. Video is another thing to do, which is different from what we want them to do.

Lee MJ Alias: Think Like a Fan - Invest in Your Fans So They Invest in You

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You can learn a tremendous amount about someone in just 10 seconds. It's not hard to teach someone more about you with visuals and then back that up with copy.

Broadcasting is no longer linear; now everyone can talk to each other. Find a way to be in the conversation with your audience.

Phantoms: Fan-run forum/fan club, Mission 1000 to fill fans in the building, pushback at first but gave rewards for bringing new people and succeeded.

Start with the foundation or the mission, and then educate people about everything you do.

Partnership with Mylec from having an authentic conversation. Now produces product in their factory. "Competitors" can become great partners.

What happens when you can network and make a community. You have to build your cause and your mission and there are no shortcuts.

1960s - JFK walking through NASA, goes up to janitor and introduces himself. "Working to put a man on the moon." When you look at your own organization or your donor, do they feel part of what you're doing? For that, need to create a team bond. Within your organization, everyone must know and believe in your mission before you can share it with anyone on the outside. If you don't believe in what we're doing why will anyone else?

People working with you must have comparable talent. Great talent cannot overcome bad tactics. You can have the best talented athletes with really bad coach and they're going to lose every game. But you can have a great coach and all ok athletes and win every game. Team bond is not always an organic thing—almost never is. Might get a good group of people together, but life happens, people don't get along all the time. Bond gets hurt. Creating it is an art. A lot of coaches say it "just comes as it comes." No, it needs to be created and nurtured. You can have the same 22 players year after year, but life happens, and you have a different team every year. Must continue, never ends. Dedicate time in workplaces to do that. Equally as important as tactics.



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