The Power of Personalization:

Smarter Outreach, Stronger Results

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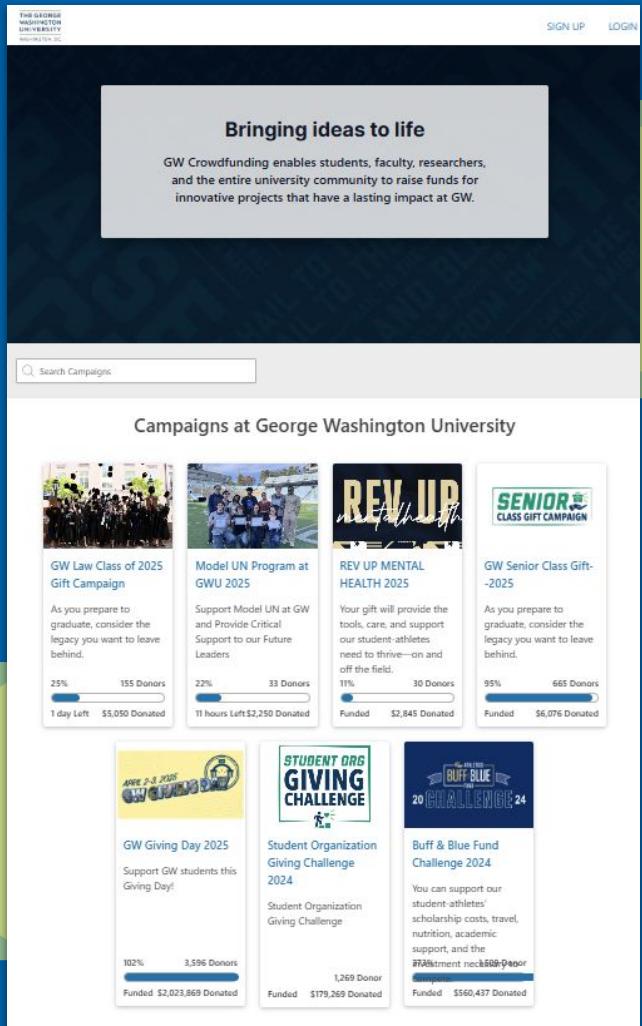THE GEORGE WASHINGTON UNIVERSITY
WASHINGTON, DC

Agenda:

1. Team Overviews

2. Why Personalization Matters

3. Personalization in Practice:

   a. GW's Approach

   b. UL Lafayette's Approach

4. Recommendations & Where to Start

About Direct Response Annual Giving at GW

- GW's centralized Direct Response Annual Giving team manages internal partnerships with 13 different schools and units.

- The Direct Response team oversees GiveCampus and all University-wide direct response channels:

  - Direct mail

  - Email

  - Text (GC Texting)

  - Crowdfunding (GC SFP) & Online giving (GC Giving Forms)

  - Telephone via digital engagement center

About Advancement Operations at UL Lafayette

- UL Lafayette's Advancement Operations team works in partnership with our Annual Giving and Alumni teams to launch initiatives

- Our solicitations and correspondences are sent via the following:

  - Direct mail

  - Email (3rd party platform)

  - Crowdfunding (GC SFP) & Online giving (GC Giving Forms)

  - GC Texting (in the works)

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Personalization in Practice: GW's Approach

What is Personalization?

- Greeting message
- Suggested Ask Amounts (Static)
- Smart Ask Amounts (not shown)
- Specific Ask Amount
- Autofill Designation
- Affiliation (not shown)
- Form differentiation (not shown, examples to follow)

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Hi Alan!

Thank you for continuing to support the George Washington University's mission!

Not Alan, Faculty/Staff? <u>Not me.</u>

Is a*******@g**.edu the best email? If not, <u>update email.</u>

$5	$10	$25
$100	$500	$1,000

Amount *

365

☐ Make this gift recurring

Fund Choice (Choose up to 5 Funds) *

President's Fund for Excellence ✕

+ Add Another

Why Personalization Matters

- Reducing Friction in the Experience of Giving

- Reflecting donors' varying interests and university affiliations.

  - E.g., Loyalty societies, graduate of the Business School, student-athletes.

- One size does not "fit all".

  - University constituencies are as complex as our universities

    - E.g., GW Textile Museum, (a membership program)

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GiveCampus Insights on Personalization

Compared to donors who land on generic giving forms, those who land on personalized forms...

50% faster

In competing the prepayment form

126% higher conversion

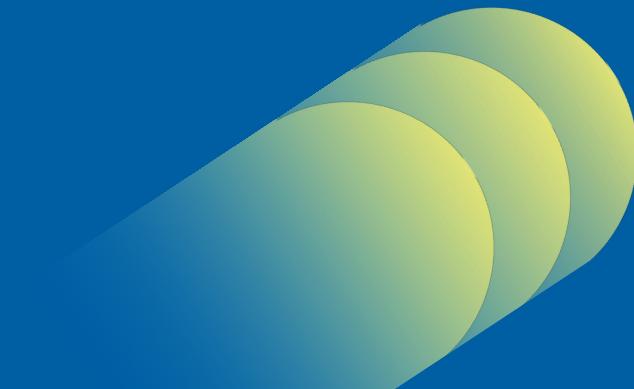More than twice as likely to complete their gift

20% higher gift size

Median gift amounts are significantly larger

16% more upgrades
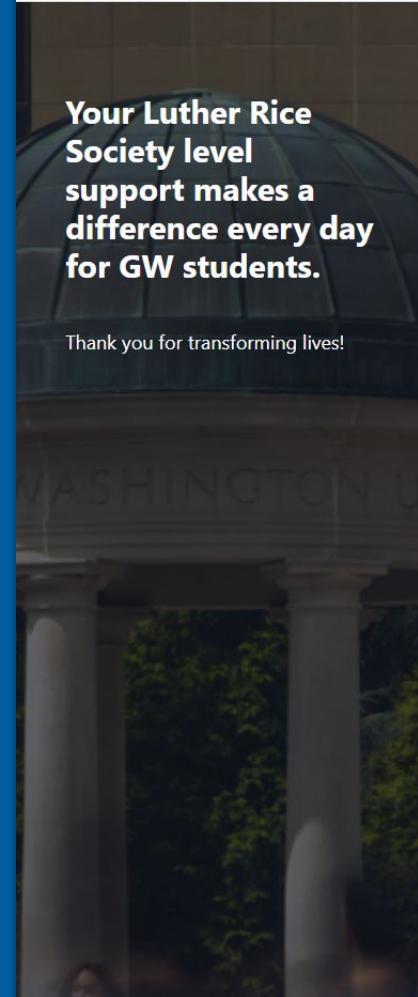
More likely to increase their gift amount

31% fewer downgrades

Less likely to give less than they have previously

GW's Approach to Personalization

- Balancing donor-centric fundraising with the competing priorities of GW schools and units

- GW's Personalization Strategy involves:

    - <u>100+ forms and 1,500+ fund designations</u> on GiveCampus

    - Personalization across multiple channels (direct mail, email)

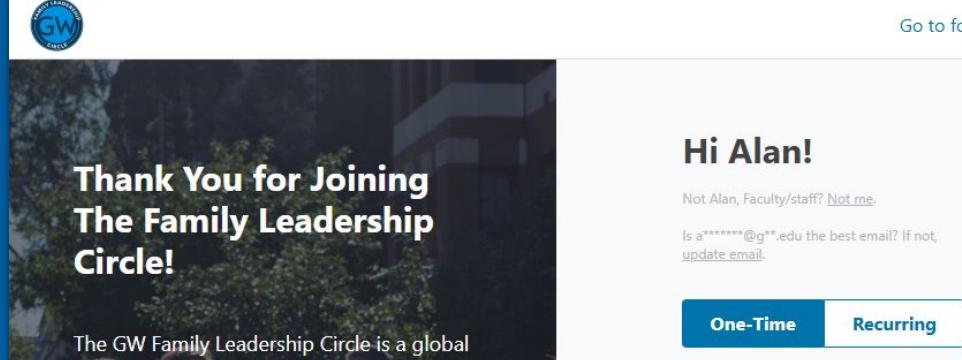   - Personalization variations for differing campaigns and initiatives

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Smarter Segmentation at GW

- Across campaigns, provide donors with multiple salient, segmented approaches

  - Past Giving Segments

    - E.g., GW Loyal, Luther Rice Society, Family Leadership Circle

  - Identity Affiliation Segments

    - E.g., Alumni, GW Families, Faculty/Staff, etc.,

  - School/Unit Affiliation Segments

    - E.g., School of Business, Athletics, Medicine & Health Sciences, etc.,
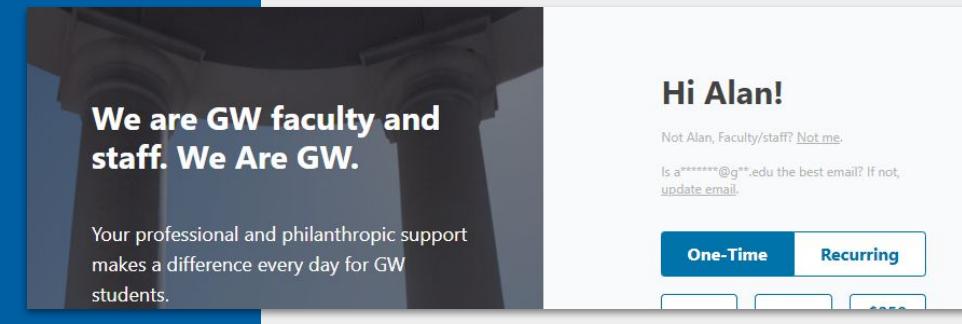
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Building a Multi-Channel Strategy at GW

- Personalization in email that matches personalization in direct mail

- Consistent Branding across channels within a given campaign
  - E.g., GW's Leadership Annual Giving society: the Luther Rice Society

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UL Lafayette's Approach to Personalization

- New to personalization and smart ask amounts

- Only utilized the smart ask amounts and standard greeting message

- Smart Ask Amount Strategy:

  - Conservative - Acquisitions
  - Neutral - Returning Donors
  - Aggressive - Leadership Annual Giving

- In order to leverage this feature, we needed to import all of our giving history from our current system of record via Data Importer

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Quick Step-by-Step Guide to Smart Ask Amounts

1. Upload a list of constituents
2. Determine your Ask Strategy (conservative, neutral, aggressive) and how many asks you'd like to generate for each person.
3. Generate Asks

Once you've generated Ask Amounts, you can determine how you'd like to leverage them in your strategy

- Export Ask Amounts (if not using GC Outreach)
- Ask Amounts will automatically generate Personalization links for each constituent, allowing you to tailor the suggested ask amounts on a Giving Form or Campaign to each individual
- Send Personalization links out easily via GC Outreach

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Smart Suggested Ask Amounts ✦

Powered by AI, GiveCampus uses donor demographics, previous giving patterns, and wealth indicators to generate smart suggested amounts for each of your constituents.

ⓘ Data used to train our AI model was last updated on **July 22, 2025 11:00PM CDT**. If you have uploaded new data to the GiveCampus platform about the constituents or their giving history for your smart asks, we recommend waiting until tomorrow so that data is taken into account.

[Find a segment...]   [New Smart Ask Amount Segment]

Segment Name	Strategy	Ask Amounts Generated	Constituents
Test Smart Ask Appeals Adv Tech	aggressive	3	7
Acquisitions - UAF Spring Appeal 2025 Smart Ask Amounts	conservative	3	83774
Returning Donors - UAF Spring Appeal 2025 Smart Ask Amounts	neutral	3	1276
LAG - UAF Spring Appeal 2025 Smart Ask Amounts	aggressive	3	99

Tags

Use tags to categorize your constituents and quickly find the information you need. Simply click on a tag to view the complete list of individuals associated with it.
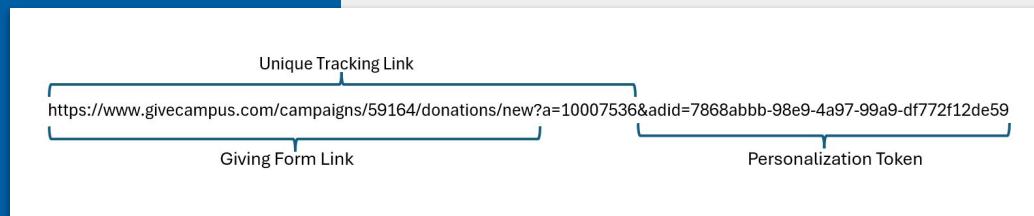
[Search Tags]   [New Tag]

Tag	Number of Constituents		
General -- No Tag	111024	Create Outreach	🗑
Acquisitions - UAF Spring Appeal 2025 Smart Ask Amounts	83774	Create Outreach	🗑
LAG - UAF Spring Appeal 2025 Smart Ask Amounts	99	Create Outreach	🗑
Returning Donors - UAF Spring Appeal 2025 Smart Ask Amounts	1276	Create Outreach	🗑
Test Smart Ask Appeals Adv Tech	7	Create Outreach	🗑

Reporting: Unique Tracking Links & Smart Ask Amounts

- We incorporated unique tracking links for individual performance for each email we sent to
- Our first 2 emails did not use smart ask amounts
- 3rd email was beginning of smart ask amounts

10007547	2025 Spring Appeal Email 1	SP_APPL_E1_25.05	https://www.givecampus.com/e68mp4	156	10 See Donors		$1,290
10007542	2025 Spring Appeal Email 2	SP_APPL_E2_25.05	https://www.givecampus.com/wa1cb0	876	16 See Donors		$1,862
10007536	2025 Spring Appeal Email 3	SP_APPL_E3_25.05	https://www.givecampus.com/zyf5nq	159	19 See Donors		$2,365

Unique Tracking Link

https://www.givecampus.com/campaigns/59164/donations/new?a=10007536&adid=7868abbb-98e9-4a97-99a9-df772f12de59

Giving Form Link | Personalization Token

GiveCampus Insights on Smart Ask Amounts

Compared to donors shown a generic ask string, those shown Smart Ask Amounts...

11% **more likely**

To accept the suggested amount

41% **more upgrades**

More likely to give more than their most recent online gift

43% **fewer downgrades**

Less likely to give less than their most recent online gift

Recommendations & Where to Start

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Recommendations

- Use tracking links to monitor what works and where to iterate.

- The more donor history, demographic, and giving trend data you include when setting up, the more accurate the suggested amounts become.

- Set up test segments as a trial run before sending anything out

Where to start?

- Start small - scale up what works

- Does your institution utilize the GiveCampus data importer?

  - If so, you can set up smart asks and personalization right away.

  - If not, you can still personalize giving links using CSV files.

- Are your Giving Forms segmented with art and copy for your institution's strongest programs?

  - If not, consider using additional forms and differentiating their art and copy to speak to your largest audiences.

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Questions?