

**The Power of Personalization:
Smarter Outreach,
Stronger Results**

GCPC'25



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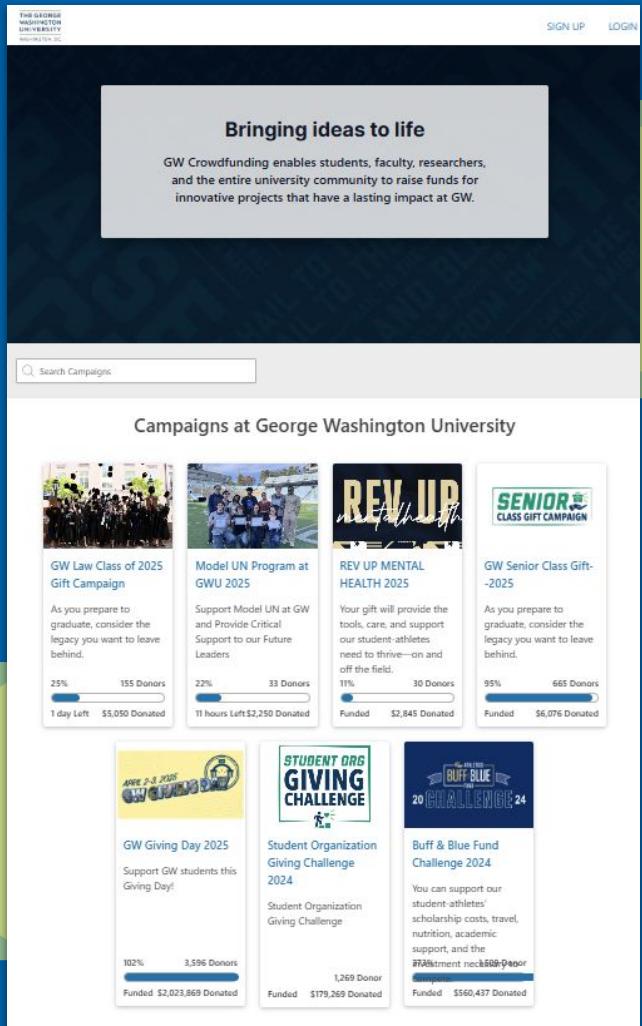


Agenda:

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



The image is a screenshot of the George Washington University GiveCampus website. At the top, there is a navigation bar with the university's name and links for 'SIGN UP' and 'LOGIN'. Below the navigation, a large banner with a dark background and yellow circles on the right side features the text 'Bringing ideas to life' and 'GW Crowdfunding enables students, faculty, researchers, and the entire university community to raise funds for innovative projects that have a lasting impact at GW.' Below the banner, a search bar is followed by the heading 'Campaigns at George Washington University'. The page displays a grid of eight campaign cards, each with a thumbnail image, title, description, progress bar, and donation amount. The campaigns include:

- GW Law Class of 2025 Gift Campaign (25% funded, 155 donors, \$5,050 donated)
- Model UN Program at GWU 2025 (22% funded, 33 donors, \$2,250 donated)
- REV UP MENTAL HEALTH 2025 (11% funded, 30 donors, \$2,845 donated)
- GW Senior Class Gift-2025 (95% funded, 665 donors, \$6,076 donated)
- GW Giving Day 2025 (102% funded, 3,596 donors, \$2,023,869 donated)
- Student Organization Giving Challenge 2024 (100% funded, 1,269 donors, \$179,269 donated)
- Buff & Blue Fund Challenge 2024 (100% funded, \$560,437 donated)

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)

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)

Hi Alan!

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

Not Alan, Faculty/Staff? [Not me.](#)

Is a*****@g**.edu the best email? If not, [update email](#).

\$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

X

+ 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)



GiveCampus Insights on Personalization

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

50% faster

In completing the prepayment form

126% higher conversion

More than twice as likely to complete their gift

20% higher gift size

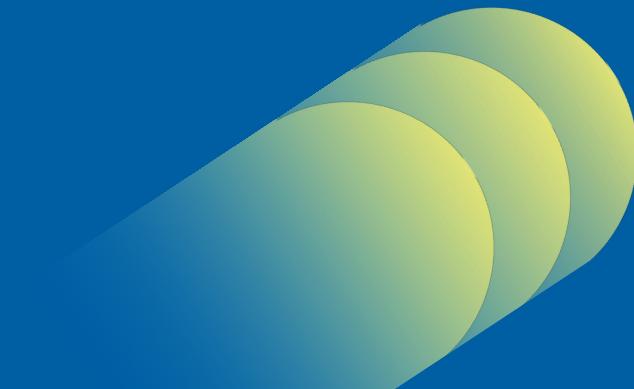
Median gift amounts are significantly larger

16% more upgrades

More likely to increase their gift amount

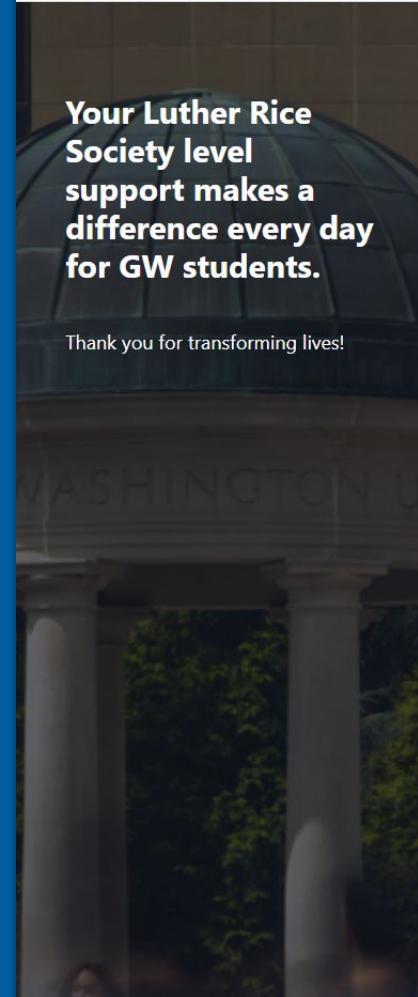
31% fewer downgrades

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:
 - 100+ forms and 1,500+ fund designations on GiveCampus
 - Personalization across multiple channels (direct mail, email)
 - Personalization variations for differing campaigns and initiatives



Hi Alan!

Not Alan, Faculty/staff? [Not me.](#)

Is a*****@g**.edu the best email? If not, [update email](#).

One-Time **Recurring**

\$5,000

\$2,500

Luther Rice Society giving is \$1,000 or more
\$1,000

Luther Rice Society giving is \$250 or more for alumni within 5 years of graduation

Amount *

\$100

Make this gift recurring

Fund Choice (Choose up to 5 Funds) *

President's Fund for Excellence ×

+ Add Another

Address *

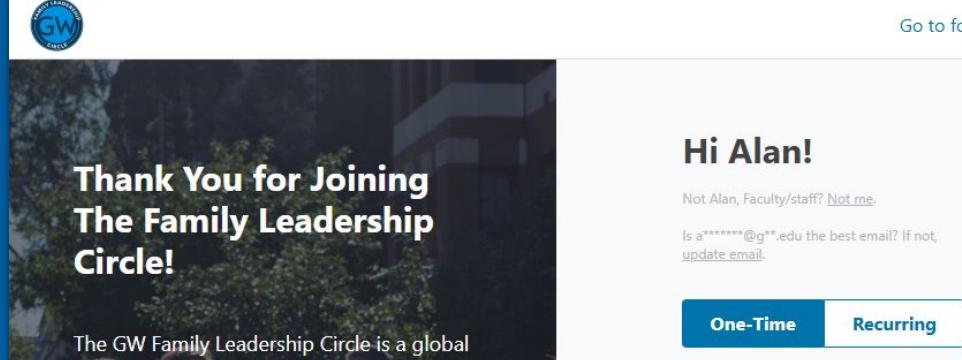
...

Country

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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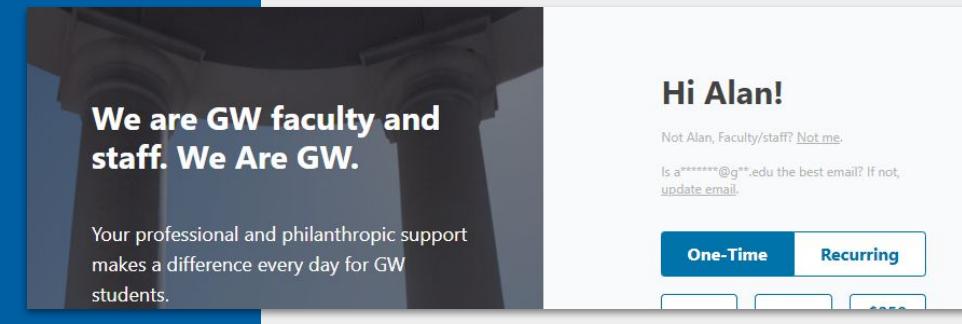
The GW Family Leadership Circle is a global

Hi Alan!

Not Alan, Faculty/staff? [Not me.](#)

Is a*****@g**.edu the best email? If not, [update email.](#)

[One-Time](#) [Recurring](#)



We are GW faculty and staff. We Are GW.

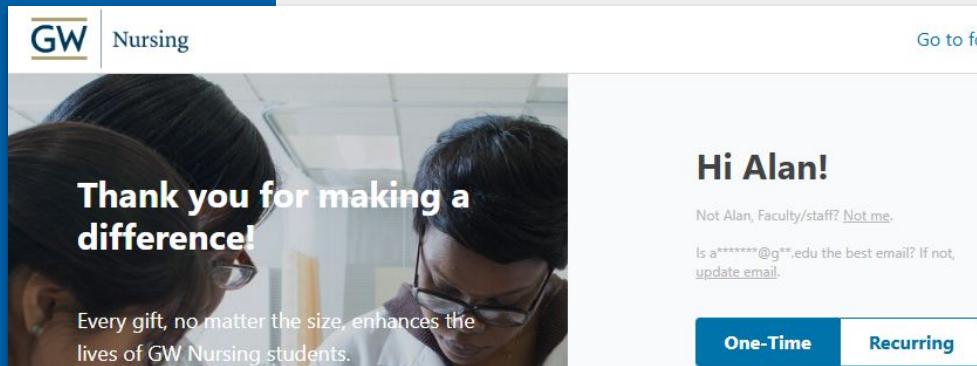
Your professional and philanthropic support makes a difference every day for GW students.

Hi Alan!

Not Alan, Faculty/staff? [Not me.](#)

Is a*****@g**.edu the best email? If not, [update email.](#)

[One-Time](#) [Recurring](#)



GW Nursing

Thank you for making a difference!

Every gift, no matter the size, enhances the lives of GW Nursing students.

Hi Alan!

Not Alan, Faculty/staff? [Not me.](#)

Is a*****@g**.edu the best email? If not, [update email.](#)

[One-Time](#) [Recurring](#)

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



Personalization in Practice: UL Lafayette's Approach

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

The image shows a donation form with a blue header and a white body. The header says "Hi Devin!" and asks if d*****@*****.edu is the best email. It has three buttons for gift amounts: \$50, \$60, and \$70. Below that is a field for "Amount *". The body of the form includes a "Recurring" checkbox, a note about a challenge, a "Designation *" dropdown set to "University Annual Fund", a "Please do not display my name" checkbox, and a "Company Matching" section with a search bar. A white overlay box titled "Smart Ask Amounts" is in the center. It says "Powered by AI. GiveCampus uses donor demographics, previous giving patterns, and wealth indicators to generate smart suggested amounts for each of your constituents. These ask amounts will be refreshed as new data is collected." Below it is a "Strategy" section with three boxes: "Aggressive" (encouraging upgrades), "Neutral" (balancing renewals and upgrades), and "Conservative" (renewing near recent gifts). The "Neutral" box is highlighted with an orange border.

Hi Devin!

Is d*****@*****.edu the best email? If not, [update email](#).

\$50 \$60 \$70

Amount *

\$

Recurring

 There is 1 match or challenge running! ▼

Designation *

University Annual Fund

Please do not display my name

Company Matching

Search Company Name

Smart 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. These ask amounts will be refreshed as new data is collected.

Strategy

Aggressive

Focus is on encouraging your donors to upgrade

Neutral

Focus is on striking a balance between renewals and upgrades

Conservative

Focus is on renewing donors near the level of their most recent gift

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

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 at **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.



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.



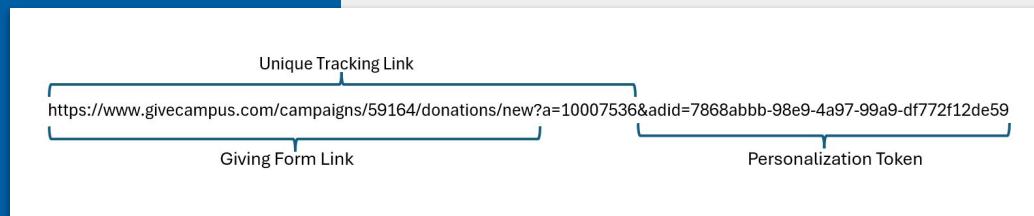
New Tag

Tag	Number of Constituents	Create Outreach	Delete
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



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

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.

The screenshot shows the GiveCampus software interface. At the top, the logo for 'THE GEORGE WASHINGTON UNIVERSITY WASHINGTON, DC' is visible. The main menu on the left includes 'Online Giving', 'Home', 'Campaigns', 'Idea Submission', 'Campaign Backup Form', 'Giving Forms', 'School Pages', 'Smart Appeals', 'Personalization', 'Constituents', 'Tags', 'Smart Ask Amounts', 'Data Upload' (which is highlighted with a blue box and three blue arrows pointing to it), 'Texting', 'Manage Gifts', 'Reporting', 'Banking & Deposits', and 'School-Level Settings'. To the right, a 'Personalization' section contains two warning boxes: one about using the 'Data Importer' and another about personalization. Below that is a 'Upload Constituent Data CSV' section with a message about using the 'level data importer'. At the bottom, there is information about a sample CSV and a note about uploading and personalizing using specific fields.

THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Online Giving

Home
Campaigns
Idea Submission
Campaign Backup Form
Giving Forms
School Pages
Smart Appeals
Personalization
Constituents
Tags
Smart Ask Amounts
Data Upload
Texting
Manage Gifts
Reporting
Banking & Deposits
School-Level Settings

Personalization

WARNING: Using both this upload and the **Data Importer** will cause d

WARNING: Personalization does not authenticate. We strongly recom

Upload Constituent Data CSV

To take full advantage of GiveCampus' p recommend you upload constituent CRM level data importer. We recommend using only to tailor more dynamic elements of experience, like greeting message and s

You can find a sample CSV that shows th constituent data. See our GiveCampus U information on how to use the different

You can upload and personalize using th

external_id, ask_amount, display_nam greeting_message, tag, affiliation_n affiliation_name2, affiliation_value

Questions?

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