



# thankview



**All Systems Go**

# How do you do?



**BENTLEY**  
UNIVERSITY

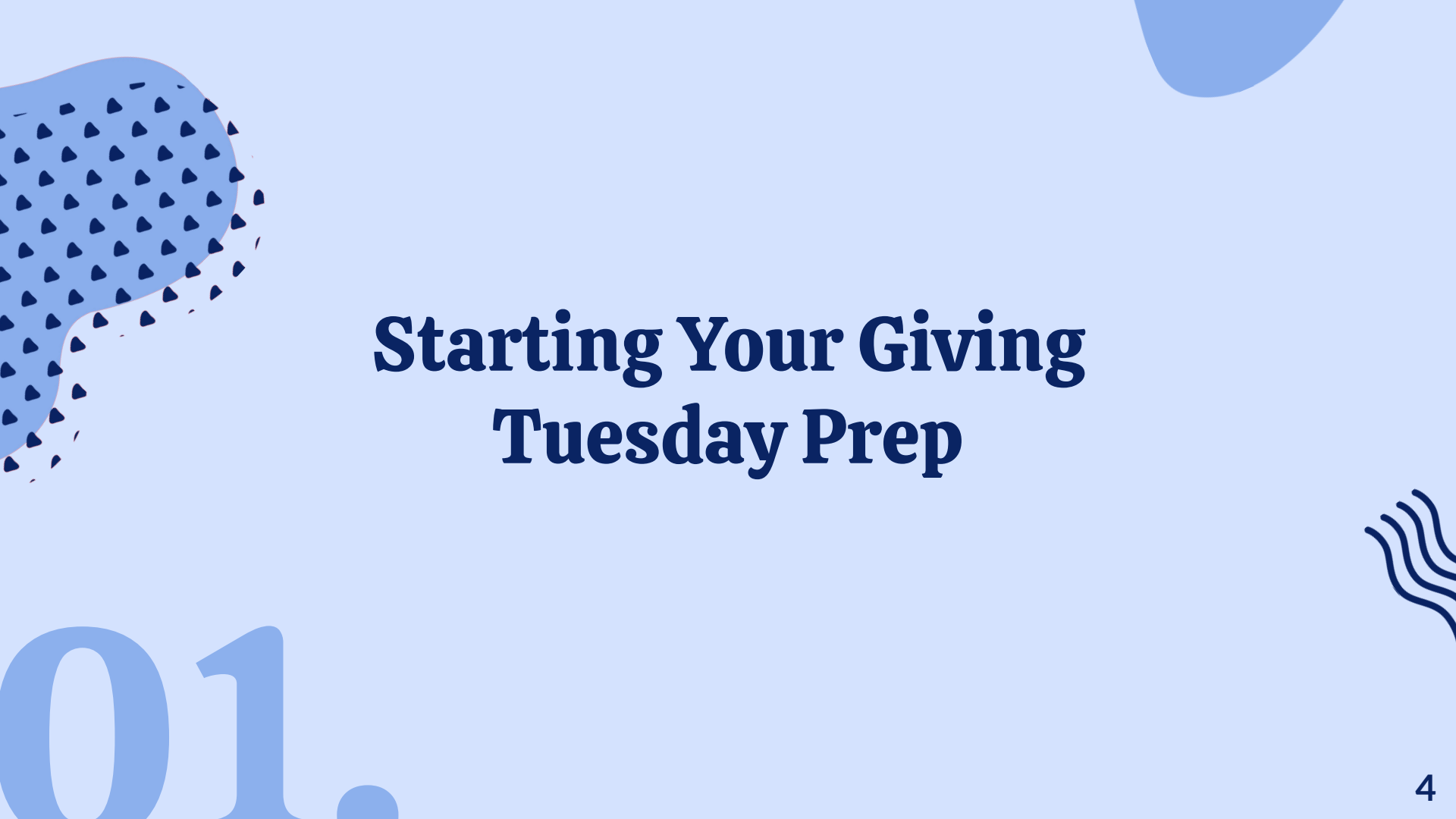
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# Agenda

- ▶ | First Steps
  - Prep Your Toolkit
  - The First Giving Tuesday Meeting/s
- ▶ | Bentley's 2020 Personalized Thank You Campaign
  - From idea to execution
- ▶ | Segmentation and Data Prep
  - How to decide your segments
  - Prepping donor data
- ▶ | Q & A



# **Starting Your Giving Tuesday Prep**

01.

# Prep your toolkit.

- ▶ | ThankView
- ▶ | Anthology → Emails, landing page, giving page
- ▶ | Excel
- ▶ | Your CRM
- ▶ | What tools do you have in your toolkit?

# Prep your crew.

- ▶ | What's our Giving Tuesday goal?
- ▶ | How much challenge money can we raise?
- ▶ | How can we engage our community?
- ▶ | What content do we need created?
- ▶ | How can we stand out and break through all the other Giving Tuesday messages?
- ▶ | How do we thank our donors?



# **The Personalized Video Campaign**

02.

## **Bentley University sent 539 personalized thank you videos through the ThankView platform.**

- 5 students pre-recorded videos for top 20 names based on FY20 Giving Tuesday donors
- 1 student on Giving Tuesday recorded personalized videos
- 12 prospect managers recorded day of messages
  - 1 recorded messages for students



**12**

Prospect Managers

**5**

Student Recorders





# The Nuts and Bolts

03.

# Deciding Segments

1. | Bentley segmented emails leading up to Giving Tuesday, but not on the day of:

- ★ Fac/Staff
- ★ Giving Society
- ★ LY/SY
- ★ Seniors
- ★ True Blue
- ★ Students
- ★ Never Givers

2. | It's important to know what your team can handle day of

# The Everpressing Question... How to Prep Donor Data?

## 1. | Before launch...

- ★ Millennium is our database of record
- ★ Received final data from Advancement Services 3 weeks prior
- ★ Cleaned data every week
- ★ Segments marked in two locations: in the spreadsheet and tab name
- ★ Built all emails in Anthology prior to Giving Tuesday
  - Preloaded recipients
- ★ Determined everyone's role for the day

## 2. | 3...2....1...It's Giving Tuesday!

- ★ Exclusion list
- ★ Running list of donors
- ★ Loaded donors into ThankView
- ★ Constant communication with prospect managers

# When do you feel like the rocket is ready for launch?

- ▶ | You've prepped your team and your supporters.

## Giving Tuesday Toolkit

- Ways to volunteer
- Heart selfies
- Zoom backgrounds
- Social media graphics
- Sample outreach messages
- Why it's important to give

- ▶ | You've got a plan for each of your tools... like ThankView!



# Takeaways

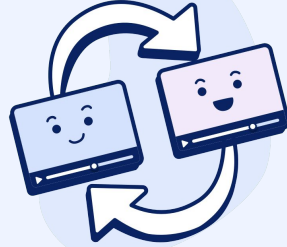
04.



# Takeaways



Set clear and attainable goals



Determine specific roles for your team



Clean your data, keep it organized, and do as much as you can in advance



Thank your donors!



# Q & A

05.



