

# ADVANCEMENT CBE PLAYBOOK



**capture**

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## Eligible Group: Anonymous & Identified Visitors

1. Toaster
2. Pop Over – Static Image
3. Pop Over – HTML Video
4. Image Swap
5. Image Insert
6. Identification Form

*\*Identification Forms can be displayed as a Pop Over or Embedded onto a webpage.*

## Eligible Group: Identified Visitors Only

1. Email Alert (to staff)
2. Triggered personalized email

## PLAY 1: IDENTIFYING LOST ALUMNI

**Rule:** Serve to anonymous visitors who visit two or more advancement tagged pages.

**Description:** Identification forms are vital in identifying lost alumni and friends of the institution not currently in the advancement database.

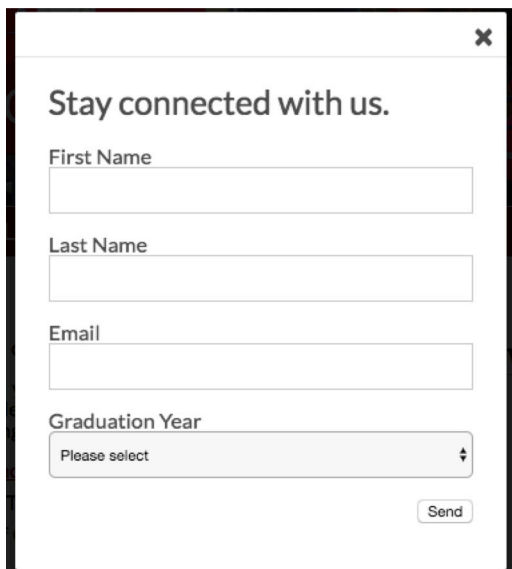
Serve Limit: 4

Per Visit Serve Limit: 1

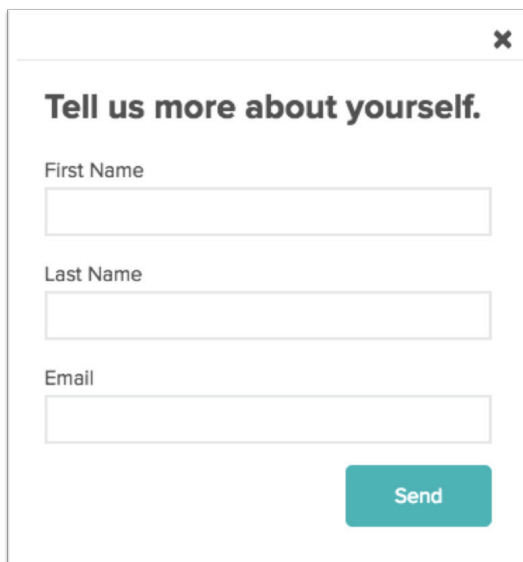
Population: Anonymous

Status: All

- Advancement-Name-Email-Graduation Year
- General-Name-Email



A screenshot of a form titled "Stay connected with us." with a close button (X) in the top right corner. The form contains four input fields: "First Name", "Last Name", "Email", and "Graduation Year". The "Graduation Year" field is a dropdown menu with "Please select" and a downward arrow. A "Send" button is located at the bottom right of the form.



A screenshot of a form titled "Tell us more about yourself." with a close button (X) in the top right corner. The form contains three input fields: "First Name", "Last Name", and "Email". A teal "Send" button is located at the bottom right of the form.

## PLAY 2: SUPPORTING ENDOWED AND CURRENT USE SCHOLARSHIPS

### Rules:

1. Serve content to identified visitors who were scholarship recipients and visit two or more advancement tagged pages (Message 1).
2. Serve content to identified visitors who were not scholarship recipients and visit two or more advancement tagged pages (Message 2).
3. Serve content to anonymous visitors who visit advancement tagged pages two or more times that do not meet additional rule sets (Message 2).

### Description:

On second visit, display custom content that matches both the interest of the prospective donor and the goals of the institution. Scholarship calls-to-action can be focused down to alumni who received scholarships (Message 1) or as a broader appeal for unrestricted funds (Message 2). Follow-up can be targeted image swaps and/or triggered email messaging.

Serve Limit: 4

Per Visit Serve Limit: 1

Population: Anonymous and Identified

Status: All

**MAKE A DIFFERENCE**  
IN THE LIFE OF A CENTRAL STUDENT.  
OUR JOURNEY SCHOLARSHIP FUND  
PAVES THE WAY.  
**DONATE**

**We Need Your Help!**  
Donate to Faux State today to help  
fund scholarships for students  
seeking business degrees.  
**Donate >**

Jackie,

Faux State needs your help! Did you know that the College of Business recently was named #1 for return on investment? As one of our distinguished alumni, we hope you're just as proud of our accomplishments as we are.

Show your FSC pride and help future business students reach their goals by giving to our business scholarship fund. With your help, many more Faux State business students can achieve greatness in the business world.

Sincerely  
Dr. Kevin Ekart

## PLAY 3: SUPPORTING CAPITAL CAMPAIGN INITIATIVES

### Rules:

1. Serve content to anonymous visitors of two or more campaign-related pages.
2. Serve content to identified alumni with campaign-related data points that visit two or more advancement tagged pages.

### Description:

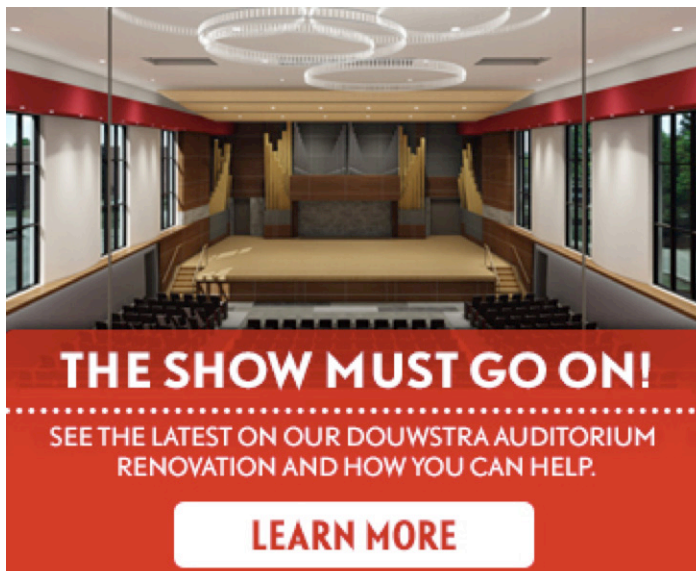
Renovating the music hall? Serve content to visitors on music pages. Content can also be served based on campaign related data points (i.e. music grads) regardless of where they land across the institution.

Serve Limit: 4

Per Visit Serve Limit: 1

Population: Anonymous and Identified

Status: All





## PLAY 4: ALERT GIFT OFFICERS OF PORTFOLIO ACTIVITY

### Rules:

Serve an Email Alert to the appropriate gift officer when an identified prospect is on the website.

### Description:


Immediately alert a gift officer, Director, AVP or VP of activity within their portfolio. Immediate alerts can be used for principal-level relationships as well as time-sensitive signals. Gift officers can be alerted when a managed prospect registers for an event, allowing the gift officer to plan appropriately.

Serve Limit: Unlimited

Per Visit Serve Limit: 1

Population: Identified

Status: All



Hi Jane Doe,  
We're notifying you because John Smith just did something interesting on your site.

**Identified Donor visited more than 5 Advancement Pages.**

**Visitor Information:**  
 John Smith  
 Capture Engagement Score: 30  
 Capture CAI: 62  
 Email: [jsmith@capturehighered.com](mailto:jsmith@capturehighered.com)  
 Phone: 502-555-555  
 Address: 2303 River Rd. Louisville, KY 40206  
 Status: Donor  
 Grad Year: 1972

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company:	Faux Electronics
name:	John Smith
tags:	Alumni
phone_phones:	
work_phones:	+1 8595555500
other_phones:	
market_segment:	Advancement
company_address_1:	600 W. Walnut St.
jobtitle:	VP Development
territory:	Gift Officer 5

Visit day and time: 1/08/2018 01:28:04 PM  
 Total visits to date: 5  
 Total page views to date: 20

Thanks for using Capture Behavioral Engagement,  
**Your Partners at Capture Higher Ed**

Bonus: Capture Labs can create market segments for Gift Officers so that they can filter which alumni are assigned to them.

**Donors**

Gift Officer Segment: Adam Haselhuhn

Gift Officer Segment: Brittany Carlson

Gift Officer Segment: Doyle Monsma

Gift Officer Segment: Kathleen Thompson

Gift Officer Segment: Michelle Wilkie

Gift Officer Segment: Sunny Eighmy

Lapsed

Long-Lapsed

Non-Donors

## PLAY 5: PROMOTE TIME SENSITIVE INITIATIVES & EVENTS

### Rules:

1. Serve toaster to all visitors for a specified timeframe (two weeks, etc.) leading up to event.
2. Serve pop over to all visitors on the big day!

### Description:

Trying to drive end of year results? Raising awareness of your day of giving? Driving attendance at chapter events? Toasters can be used as informative reminders to “save the date” or remind donors of an important date. When the day comes, use pop overs as a more forthcoming tool to make it easy for donors to engage your messaging. Consider geo-targeting for regional events!

Serve Limit: 4

Per Visit Serve Limit: 1

Population: Anonymous and Identified

Status: All



**You're Invited!**  
Register for President Huey's **State of the University** reception next week.  
[REGISTER NOW](#)



**New Year, New Dreams**  
Play Your Part to Train the Best and Brightest Graduates  
[LEARN MORE](#)

## PLAY 6: DYNAMIC LIST

**Rules:** Use Capture’s standard daily/weekly/monthly exports of identified visitors to your websites, or create your own custom dynamic list, to prioritize development office outreach.

**Description:**

Dynamic lists can help identify active alumni in targeted demographics including major, planned and annual giving. Dynamic lists can include:

- i. High capacity, high affinity, unassigned prospects for gift officer assignments.
- ii. High affinity, older alumni of all capacity levels for planned giving outreach.
- iii. High affinity alumni with strong lifetime giving for leadership and major gift assignments.
- iv. High affinity alumni with a spike in recent giving.

Dynamic lists include Capture Engagement Scores (CES) and lifetime Capture Affinity Indexes (CAI) for individual alumni. Prioritize direct mail and phone-a-thon on engaged alumni.

## PLAY 7: MATCHING GIFTS

**Rule:** Serve content to alumni who visit the website and:

- a. Have a gift on record.
- b. Work for a known matching gift company.
- c. Do not have a matching gift on record.

**Description:** Thank donors for their gift while making it easy to complete the matching gift process.

Serve Limit: 3

Per Visit Serve Limit: 1

Population: Identified

Status: Donor





## PLAY 8: INCREASE AFFINITY TO INCREASE PARTICIPATION

**Rule:**

1. Deliver content to all visitors on each visit to specific pages.

**Description:** Make it easy for visitors to find timely brag points. Showcase institutional rankings this week and a successful student team next month. Future visitors can include follow-up messaging built off affinity messaging.

Serve Limit: 2

Per Visit Serve Limit: 1

Population: Anonymous & Identified

Status: All

### Affinity Messaging



Have you heard?

*U.S. News and World Report* has ranked Faux State College of Business #1 for return on investment.



LEARN MORE

### Follow Up Messaging Built on Affinity



Faux State College of Business has been ranked #1 for return on investment.

It's an elite group.

Help us continue the legacy.

DONATE NOW

## LAYERED CAMPAIGNS

Layering dynamic content campaigns is a powerful way to create the custom browsing experience alumni have come to expect. Using progressive pieces of content reinforces messaging to nudge alumni towards further engagement and support with a meaningful area of your institution.

### Layered Campaign Example 1: Matching Gift Layer

1. Toaster: “Did you remember to submit your matching gift information?”
2. Triggered Email follow-up: “Our records indicate you work for a matching gift company. Click here to complete your matching gift or click here to update your information with the institution.”
3. Image Swap: “Matching Gifts Funded Two Scholarships Last Year. Please Click Here to Fulfill Your Matching Gift in Two Simple Steps.”

### Layered Campaign Example 2: Planned Giving Layer

1. Toaster: Quotes from a Donor – “The institution has been a lifelong friend.” Click Here to Learn More About John and Kathy Smith’s Generous Planned Gift
2. Triggered Email: “We would like to thank John and Kathy for their generous gift. We encourage you to consider your relationship to our institution – we are certainly proud to play a small part in each of our alumni stories. Please consider the resources on our planned giving page or begin the conversation by contacting Mr. Planned Giving.”
3. Dynamic Lists to Prioritize Outreach: Alumni who click the planned giving toaster, open the email or visit the planned giving page but do not reach out.

### Layered Campaign Example 3: Finding Lost Alumni

1. First Visit Toaster: “See What’s New with the Faux State Alumni Association” (Link to registration form for identification)
2. Ongoing: Map all online forms for identification when registering for events/making a gift/etc.
3. Second Visit: Progressive Identification (PID) Form
4. Fourth Visit: Progressive Identification (PID) Form

### Layered Campaign Example 4: Capital Campaign

1. Funding Priority Toaster: “Renovate the Auditorium!”
2. Triggered Email: “Dean Cobb Cites Auditorium Renovation as Primary Music School Need”
3. Image Swap: “Don’t Pardon our Dust! See the Auditorium Progress!”
4. Fiscal/Calendar Year End: “President Huey Prioritizes Auditorium for our Prestigious Music School!”

## Before Image Insert:

The screenshot shows a website page for Men's Basketball. On the left is a navigation menu with links for Basketball, Schedule, Roster, Baseball, Golf, Soccer, Swimming, Tennis, and Volleyball. Below the menu are social media icons for Facebook, Twitter, YouTube, Instagram, LinkedIn, and a refresh icon. The main content area features a breadcrumb trail (Home > Athletics > Men's Basketball), the page title 'Men's Basketball', and a 'SCHEDULE' section with a table of games. To the right is an 'Important Links' section with links to Season Tickets, Fan Zone, Athletics News, and Hall of Fame.

Date	Time	Home Team	Location
11/1/17	7PM	University of Toledo	Toledo, OH
11/4/17	7PM	University of Louisville	Louisville, KY
11/7/17	7PM	Bellarmino University	Louisville, KY
11/15/17	7PM	Mercer University	Louisville, KY
11/20/17	7PM	Belhaven University	Jackson, MS

## After Image Insert:

This screenshot is identical to the one above, but with a new image insert added to the bottom left of the main content area. The insert is a dark red box with white text that reads: 'We Need Your Help! Donate to Faux State today to help fund scholarships for students seeking business degrees.' Below this text is a yellow button with the text 'Donate >'.

*A LIFELONG AFFAIR*

Learn more about the Erenberger Planned Giving Society.

**LEARN MORE**

Be the Future

Learn how young alumni create a better tomorrow for Faux State.

**CHECK IT OUT >**