

# 2 Step Campaigns and Lead Generation

Breakfast Club Session, Leuven, 6<sup>th</sup> February 2020

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# Session Objectives

- Develop your own lead generation campaign propositions and messaging
- Explore lead generation through case studies and theory:
  - Key metrics, analytics and a data-driven approach
  - Testing and optimisation
  - Channel strategy
  - Creative approaches
  - Production/execution

# Workshop Plan

## 1. Fundamentals

- a) Community and engagement
- b) Cross-organisational benefits

## 2. Examples and case studies

## 3. Lead gen proposition and action types

## 4. What determines 2 step campaign success?

- a) Strategy and supporter journey
  - i. Proposition testing
  - ii. Channel investment
  - iii. Understanding motivators and channels
  - iv. Audience strategy

## b) Proposition

- i. Strategic and creative factors

## c) Execution

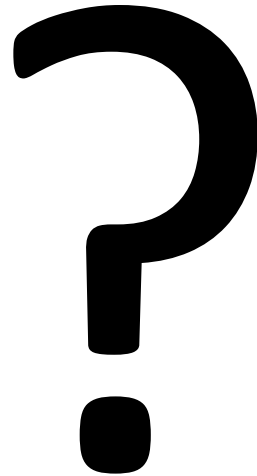
- i. Creative execution
- ii. Content planning and management
- iii. Social advertising campaign management
- iv. Technical production
- v. Calling program

## d) Responsiveness

## e) Community

## f) Diversity

# Why Are You Here Today?

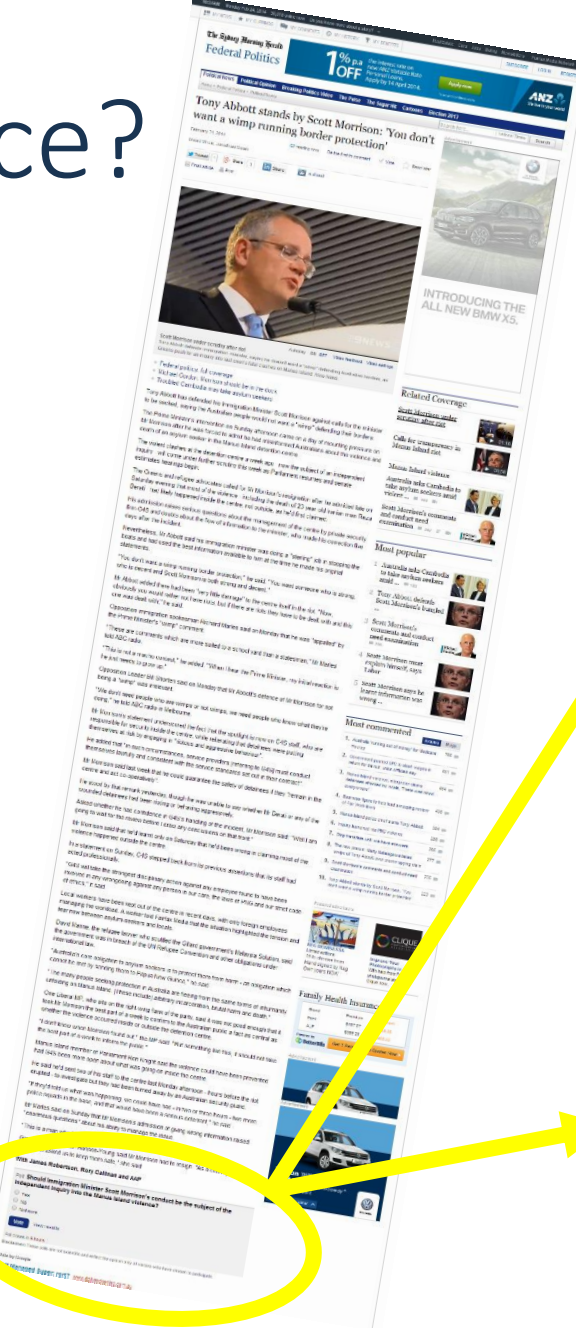


# Our Supporters' Expectations are Changing

# What's the difference?



# VS



366 comments

« NO....  
We want somebody who displays and portrays genuine compassion, not some shallow career automaton. His arrogance and hubris was always going to be his undoing.  
There are far cheaper ways to manage these genuinely needy, rather than lock them up in some South Sea gulag for ever.  
Disgusting.

Richard | Melbourne February 24, 2014, 7:02AM

« I don't understand how "being a wimp" and "giving correct information" go hand in hand. What's so wimpy about telling the truth?  
It's all just macho hype from Abbott. Ahh, he thinks dumb Aussie blokes are just suckers for that sort of talk.

Cooorrr, wouldn't want to be a wimp!

sarajane | Melbourne February 24, 2014, 7:12AM

« Love it when Prime Minister Joffrey talks tuff slang.

Joe Citizen | Melbourne February 24, 2014, 7:13AM

« worst government ever!!!  
This is just the start. The arrogance of this government is amazing. See one slip up by morrison and the media wants his head hahah! He really should be nicer to people!  
Abbott is permanently in opposition mode. pathetic PM pathetic MPs.  
Get rid of them!

Keating | February 24, 2014, 7:23AM

« Richard - Please enlighten us what are the far cheaper options? the rate the boats are not coming there maybe the need for Manus Island will no longer exist in the future.

Sarah of Carnegie | February 24, 2014, 7:24AM

« +1

CB | Sydney February 24, 2014, 7:37AM

« I think I'd like the truth no matter how ugly it is. Even the truth about why we have refugees coming here in the first place. And how about a government that takes some responsibility for their actions? That might be nice too. They could start by taking a minimum 50 percent pay cut or removing their electorate allowance, postal allowance, monthly stipend, and other entitlements that boost their personal wage by a few hundred thousand a year.

John Michaels | February 24, 2014, 7:37AM

« Abbott reminds me of a certain ruler 2,000 years ago who washed his hands after authorising the crucifixion of Jesus Christ.

It's a very good thing that neither Abbott nor Morrison are Christians otherwise they would be in constant ethical and inner turmoil



# What do your supporters want?

- *The good old days:* Supporting a charity was just about donating.
- But with the advent of web 2.0 (social media, blogging etc), people expect to:
  - Be part of the **story**
  - Be part of the **conversation**
  - To receive **value**...





# What do your supporters want?

- ... To be asked for **more than just money**

(Some people are happy to just give money, *but others want to be more involved*)

AMNESTY INTERNATIONAL

HOME OUR WORK GET INVOLVED DONATE NEWS ABOUT SHOP

Send a message to women's rights advocates in Afghanistan

ACT NOW LEAVE A MESSAGE

First name \* Last name \* Email \* Phone \* Your Message (140 characters at most)

Send

ParkinsonFonds

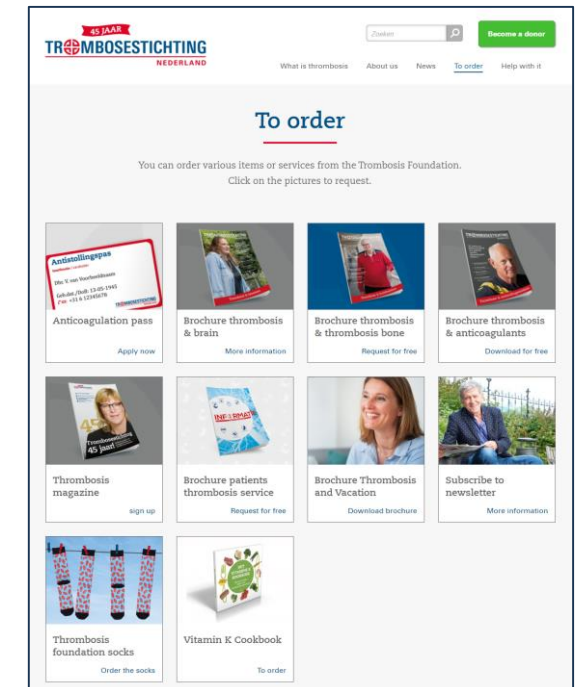
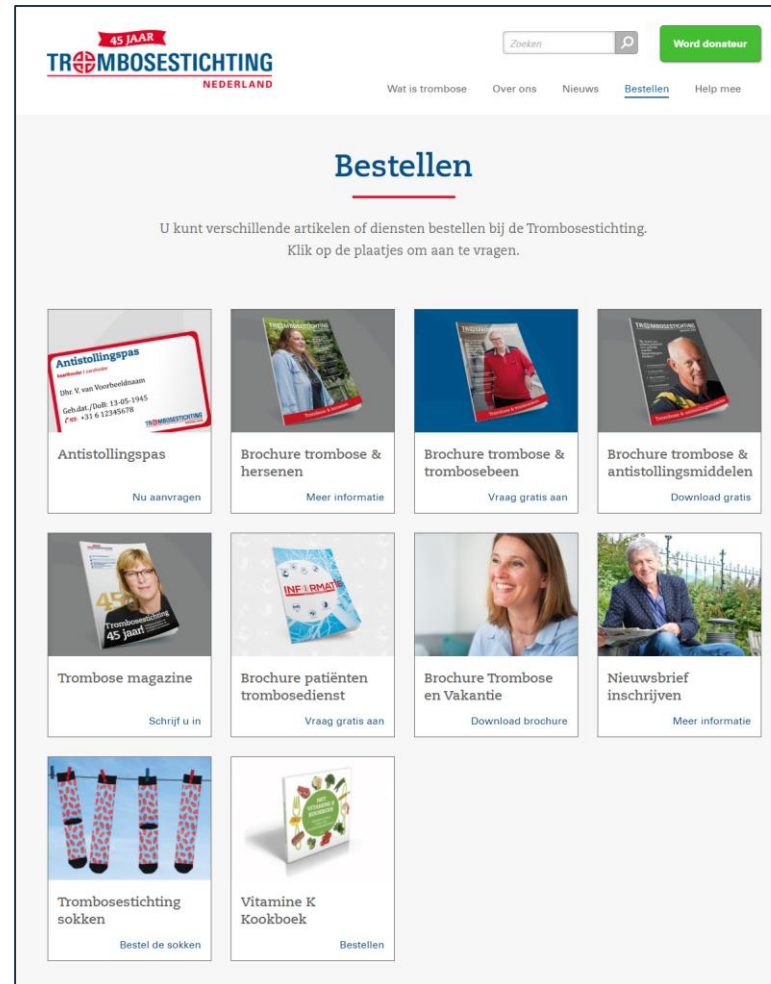
Stem op de mooiste voorkant en ontvang onze kalender gratis!

Voorkant 1 Voorkant 2 Voorkant 3



# What do your supporters want?

... And not just to give,  
but also to **receive value**  
that will improve their  
lives



# Communications vs Engagement

## Traditional “communications”

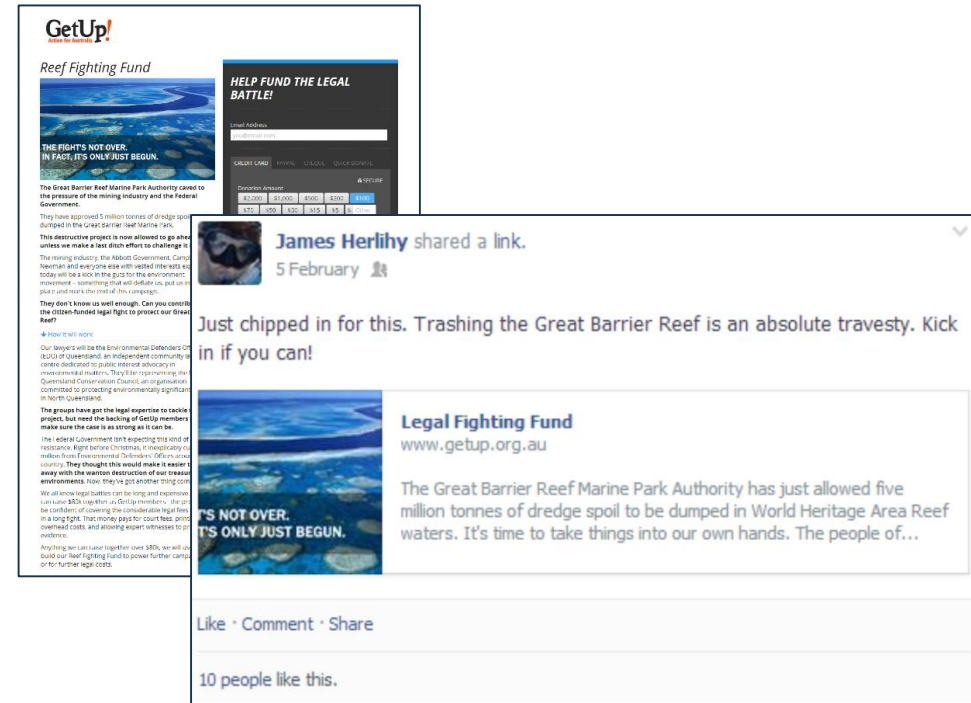
One-way, telling people what’s happening and important

VS

## Conversation and engagement

Interactive, participatory story-making

- People now want and expect to:
  - Be part of a **tribe**
  - Be **inspired**
  - **Express** their values
  - Be **recognised** for their actions
- This can be powerful for us as fundraisers!



# What Does This Mean For Fundraising?

A healthy donor acquisition program

=

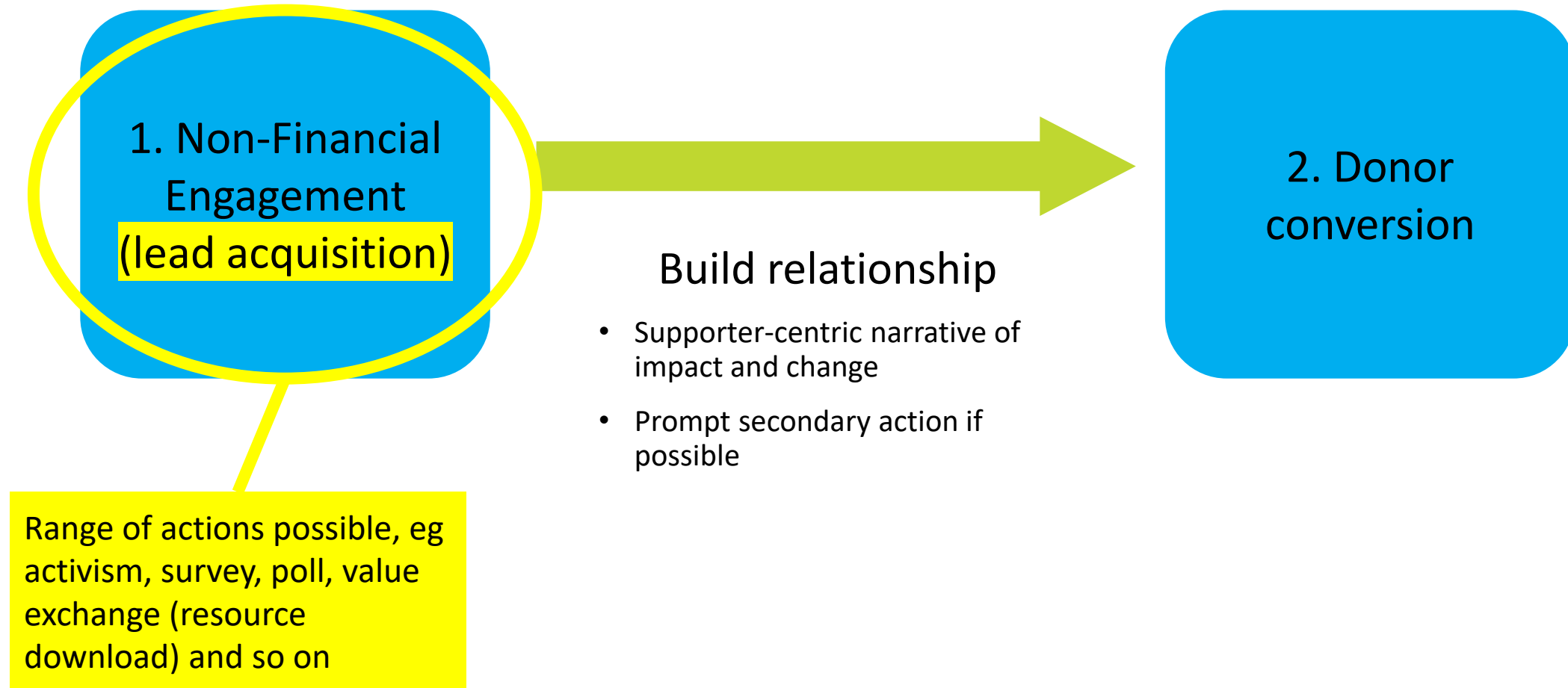
Always-on acquisition at scale

# Digital Acquisition Models

- **Direct to donation**
  - Difficult to make work reliably, at scale, outside of disaster response or sponsorship
- **Peer-to-peer events**
  - Can deliver at scale, but is time and energy intensive
  - *Participants* are highly committed, but *donors* usually don't convert
- **Crowdfunding (or tied fundraising)**
  - Can be great, but requires the right product
- **2 step campaign acquisition (lead generation)**
  - Can deliver always on acquisition at scale
  - Covers a wide range of propositions and types of action
  - Can deliver great community growth (or lead acquisition) – which equals future fundraising potential

And the reason is:  
The engagement

# What is a 2 Step Campaign?

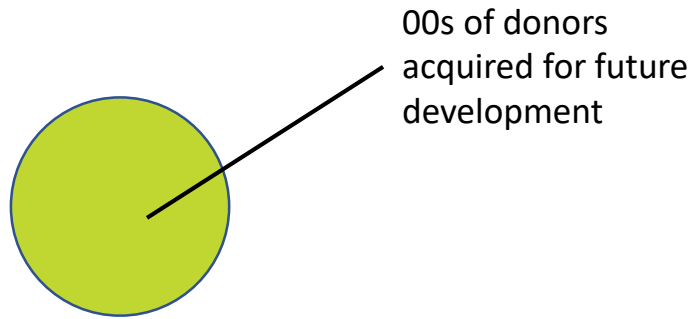


# Non-Financial Engagement as the “Way In”

- **Richer engagement**
  - = higher donor conversion rates
  - = stronger donor relationship (with beneficiaries and you)
  - = greater loyalty; lower donor attrition
- Greater **community growth** (engaged email list, Facebook fanbase etc)
  - = greater immediate and future donor conversion AND delivery on other organisational objectives

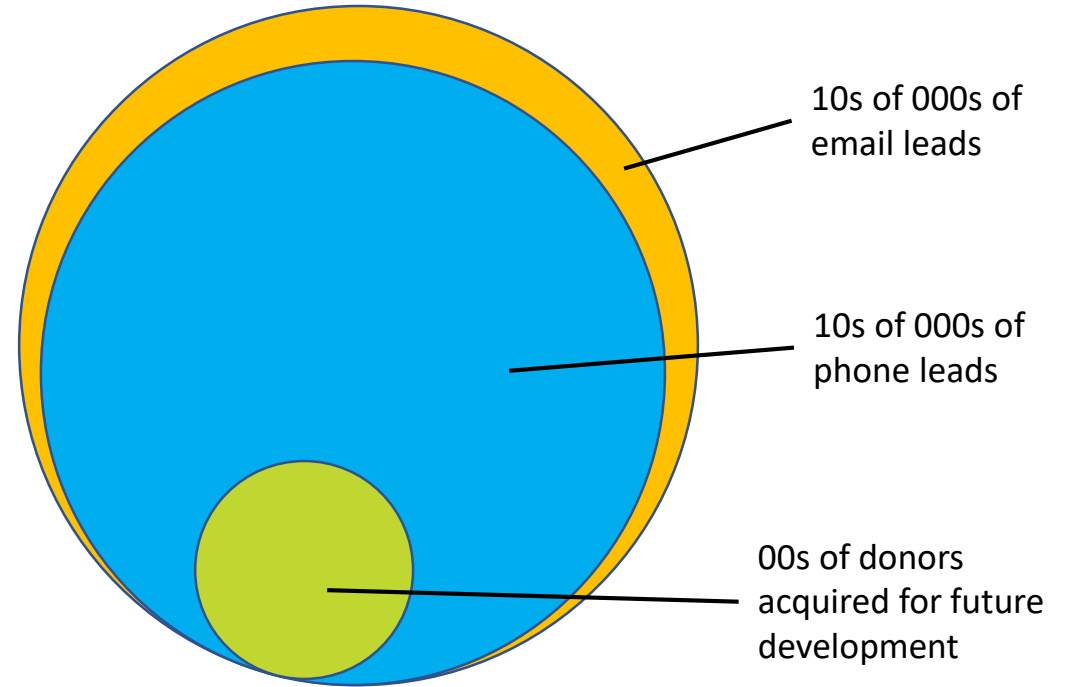


# Community growth



## Direct to Donation campaign scenario

1,000 donors acquired  
= 1,000 leads for future development



## 2 step campaign scenario

1,000 donors acquired,  
10,000 more phone leads acquired,  
20,000 more email leads acquired

**= 10s of 000s of leads for future development**

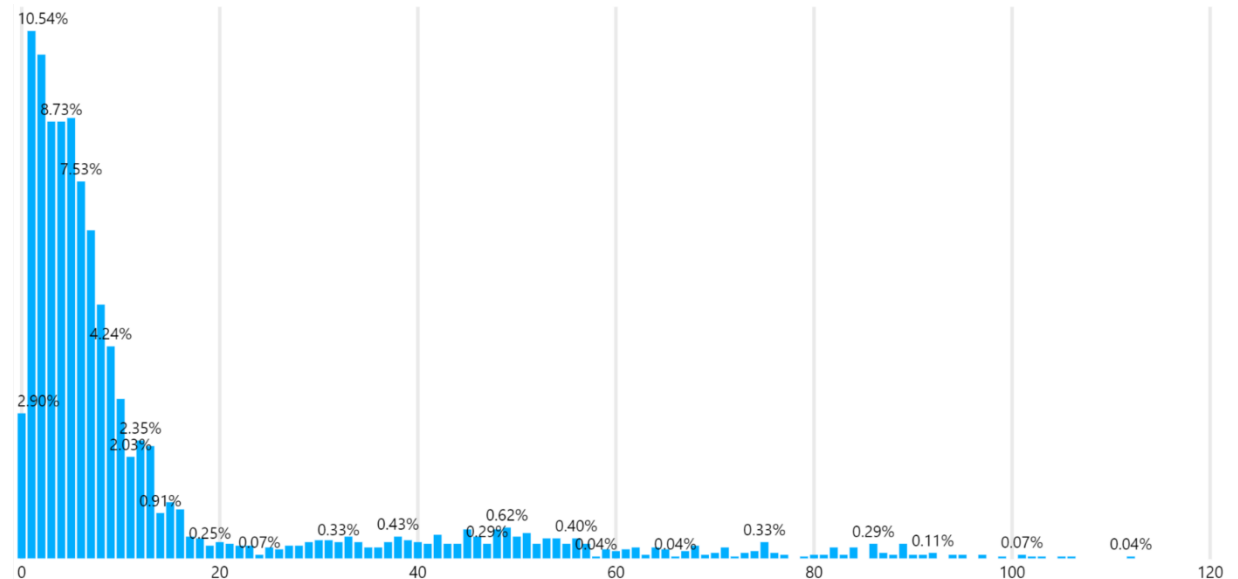
... Future fundraising, events, mobilisation,  
surveying, awareness raising etc

# Supporters Become Donors

- Late 2018 study on Bush Heritage's rolling, 2.5 year-old 2 step program
- Examining post-campaign conversion of leads (6/8 weeks from lead acquisition)

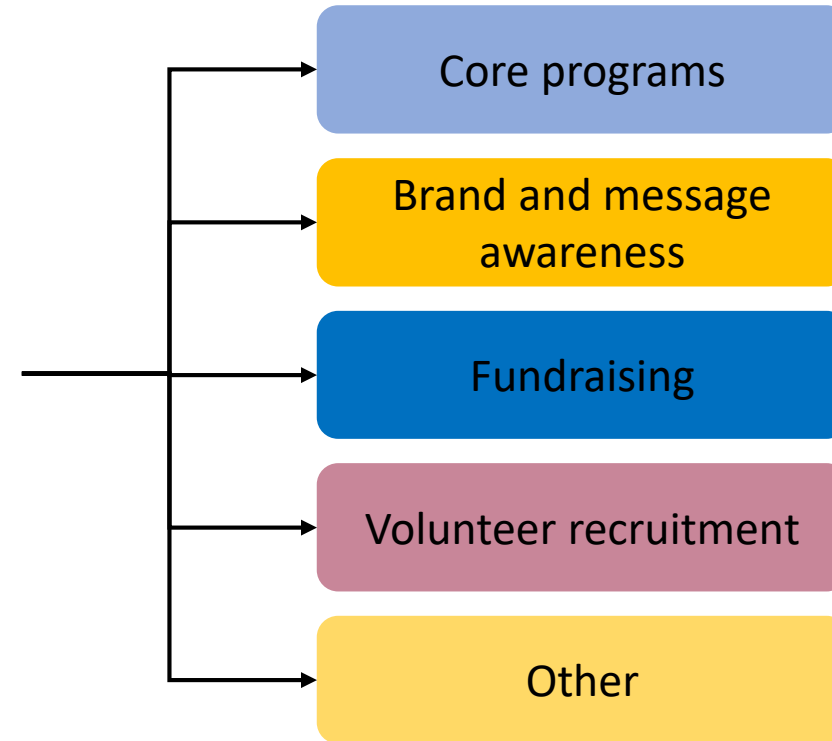
## Key findings:

- Donor conversion of leads has a *looong* tail
- Within 2.5 years, RG conversion of new leads increased by at least 58% on top of the initial calling campaign
  - 1,009 of a total 2,762 RGs came after initial conversion attempts
- Even more pronounced for cash donor conversion



# Community Helps Achieve Objectives

- The best 2 step campaigns:
  - Build your **community**, who are ...
  - **Long-term, dedicated and engaged,** and ...
  - Help you deliver on **objectives from across the organisation.**



# Common Types of Non-Financial Action

## Petition (activism/advocacy)

- *Call on a target (political, corporate etc) to take a specific action*
- *Can be critical or supportive/positive of the target*

## Survey/Questionnaire/Quiz

- *Tell us your knowledge of/experience with XYZ*
- *Stated goal or outcome can vary, eg:*
  - *Quiz: Challenge yourself/your friends, find out how much you know*
  - *Survey: Help us find out people's attitudes towards XYZ so we can improve our programs*
- *Tone can vary - from serious to fun to comical*

## Poll

- *Answer a single question on a resonant issue*

## Behavioural pledge

- *Commit to adhere to certain behaviour*

## Value exchange

- *Get something of value to you in exchange for your details*
- *Eg a resource or back-end premium*

## Hand-raiser

- *State your support for a certain value statement*

## Send a message

- *Send a message to a beneficiary or 'hero' figure, eg fieldworker*

## Game

- *Play a compelling game that builds your engagement with cause*

## Share your story/photo/design (competition)

- *Share your beautiful story or photo about something*
- *Can be run as a competition*

**... And there are many more!**

## EXERCISE 1

## 3 CAMPAIGN IDEAS

### 1. Create three lead gen campaign ideas for your organisation

- Each idea should include:
  - a) Action type
    - le survey, poll, petition, hand-raiser etc
  - b) Proposition
    - **“Take *X action* to achieve *Y outcome*”**  
*(usually but not always “for *Z beneficiary*”)*

### 2. Share with your neighbours

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## d) Responsiveness

## e) Community

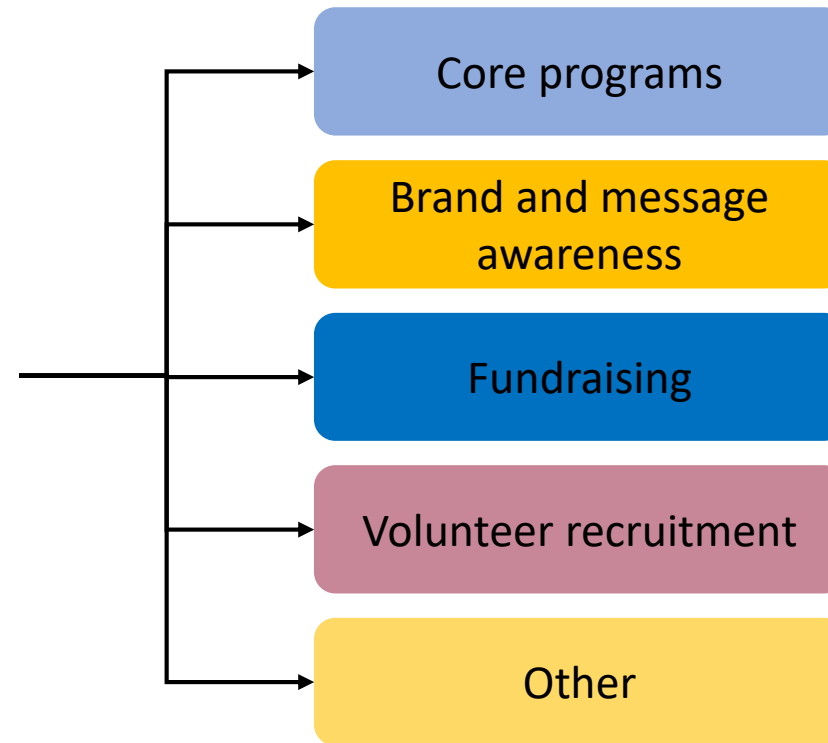
## f) Diversity

# What Determines 2 Step Campaign SUCCESS?

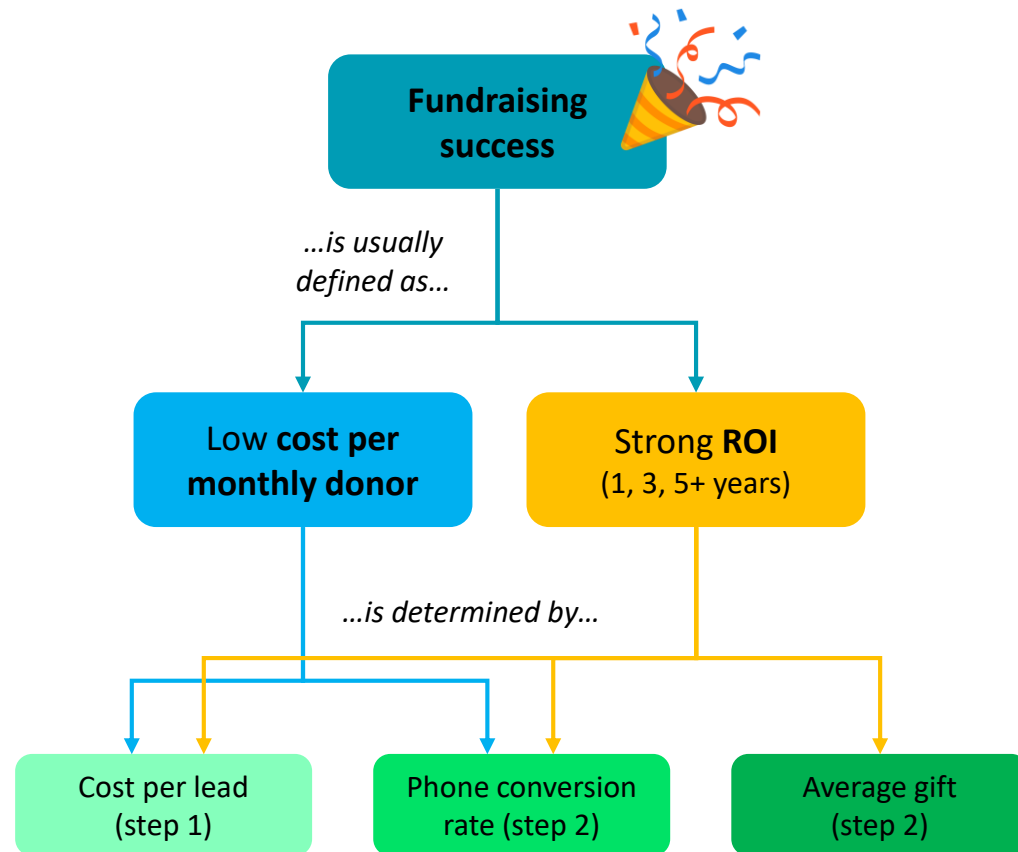


# Community Helps Achieve Objectives

- What are your key objectives?
- Is it just fundraising, or are you trying to achieve other things?



# How Do We Measure 2 Step Success?



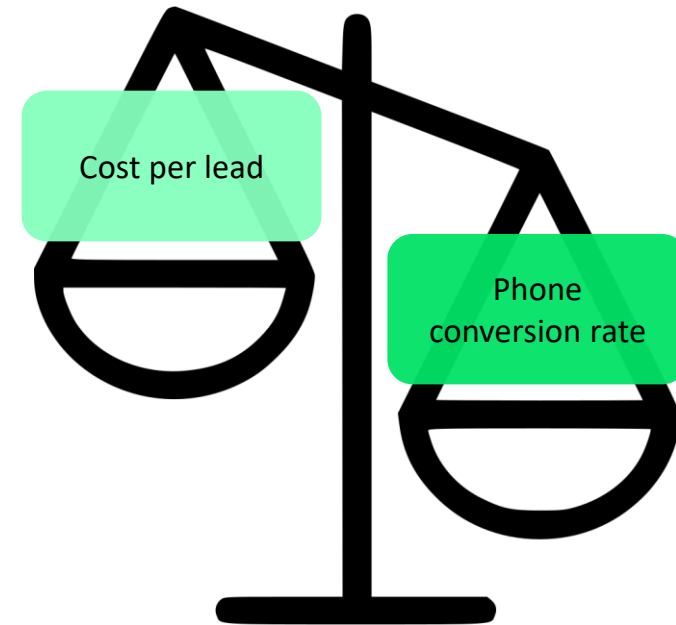
**... and don't forget  
secondary conversion!**

# How Do We Measure 2 Step Success?

## Example 2 step campaign results

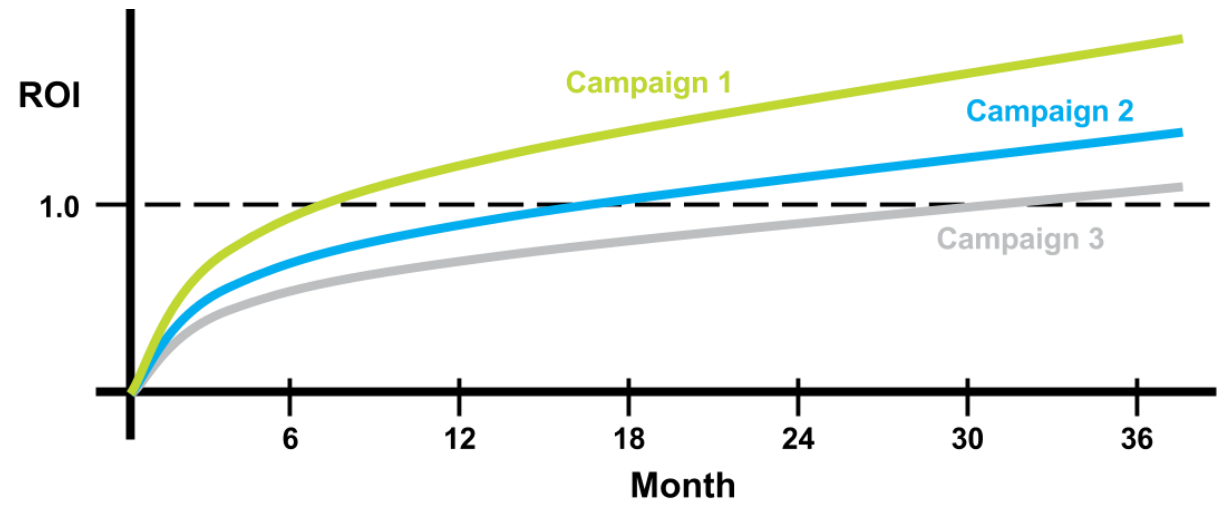
Audience	Cost per lead	Phone conversion rate	Cost per CG *
Audience 1	€1.34	8.2%	€102.38
Audience 2	€4.45	14.0%	€94.14
Audience 3	€2.37	10.6%	€94.15
Audience 4	€3.70	13.1%	€91.80

\* Excluding staff and/or agency costs  
Assumes phone contact rate of 65% and standard phone calls and costs per hour



# Velocity of Return

If it's headed in the right direction,  
you should probably keep it going!



**... and don't forget  
secondary conversion!**

# What Type of Cause Works Best?

- The success of 2 step campaigns is **not** determined by a **brand or type of mission**.
- These have worked well for:
  - Conservative medical research orgs
  - Animal welfare activism orgs
  - Conservation orgs
  - Humanitarian and human rights orgs
  - New, unknown brands
  - Well-established brands

# What Type of Action Works Best?

- The success of 2 step campaigns is **not** determined by a single **action type**.
- We've made it work with:
  - Petitions
  - Pledges
  - Polls
  - Surveys and quizzes
  - Offers (value exchange)
  - And more

# So What *Does* Determine 2 Step Success?

The success of 2 step campaigns is determined by strength of:

1. Strategy and supporter journey
2. Proposition
3. Execution
4. Responsiveness
5. Community
6. Diversity



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## e) Community



## f) Diversity

# 1. Strategy and Supporter Journey

What Makes for a Successful 2 Step Campaign?

# Cost-per-lead: A Key Campaign Determinant

- Cost-per-lead can make or break a 2 step campaign
- **Example:** Campaign advertising spend = \$4,000

Scenario	Cost per lead	Lead volume	Implications
Scenario 1	\$1.75	2,286	 <ul style="list-style-type: none"><li>• Phone room busy</li><li>• Great start to cost-per-RG</li></ul>
Scenario 2	\$6.80	588	 <ul style="list-style-type: none"><li>• Surplus calling capacity</li><li>• Very hard to claw cost-per-RG back to acceptable (unless phone conv' rate is super-high)</li></ul>

So how do we **optimise CPL** to **maximise probability of success**?

# Lead Gen Proposition Testing

1. Test 3 propositions using a light/“minimal viable product” approach
2. Gather data on response (CPL), engagement, sentiment etc
3. Invest in rolling out the most successful proposition
  - And keep any other acceptable ones in the back pocket for later

**The lead gen proposition:**

***“Take **X action** to achieve **Y outcome**”***

*(usually but not always “for **Z beneficiary**”)*

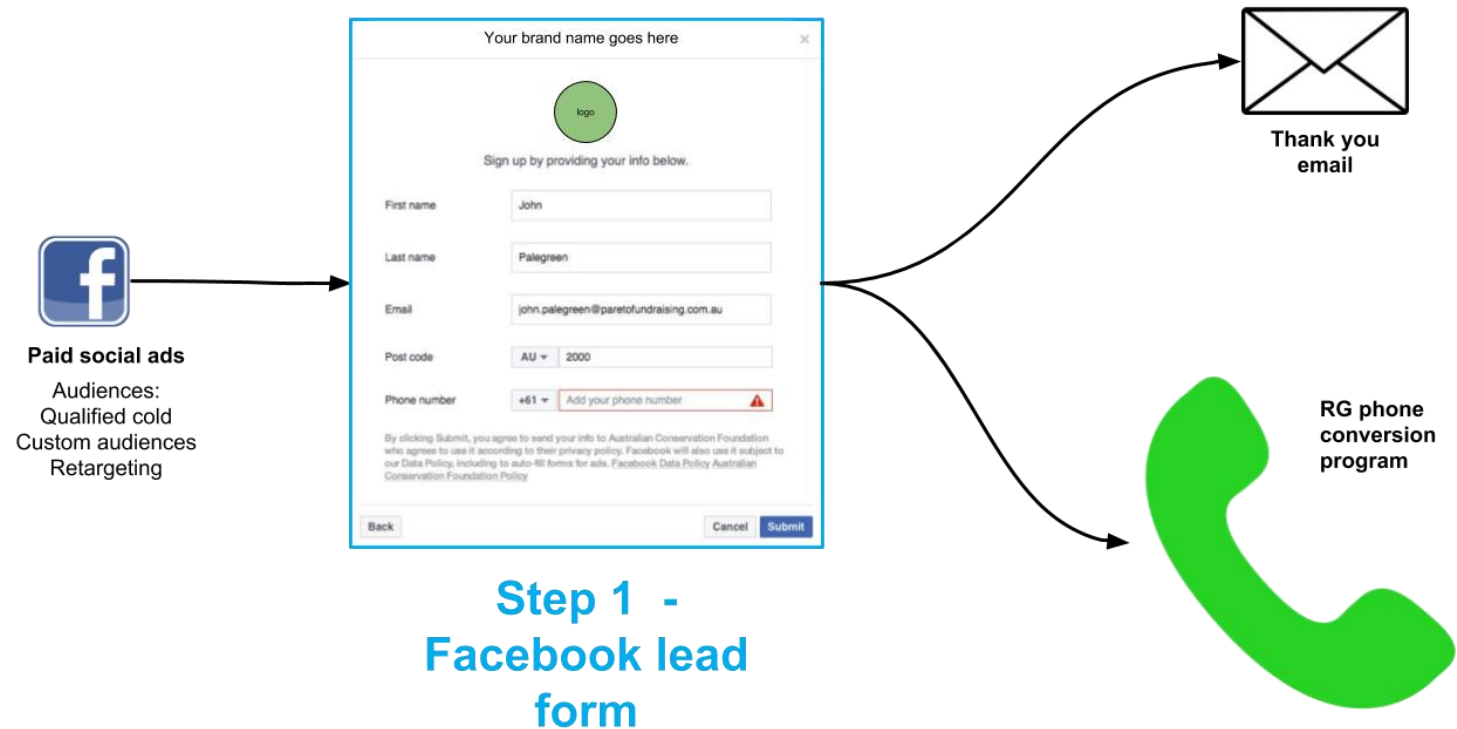
# Your Supporter Journey

- What will your supporter journey be like?
  - Lots of choice for execution
  - Do you want a big splash campaign?
  - Do you want a lighter, more agile approach?



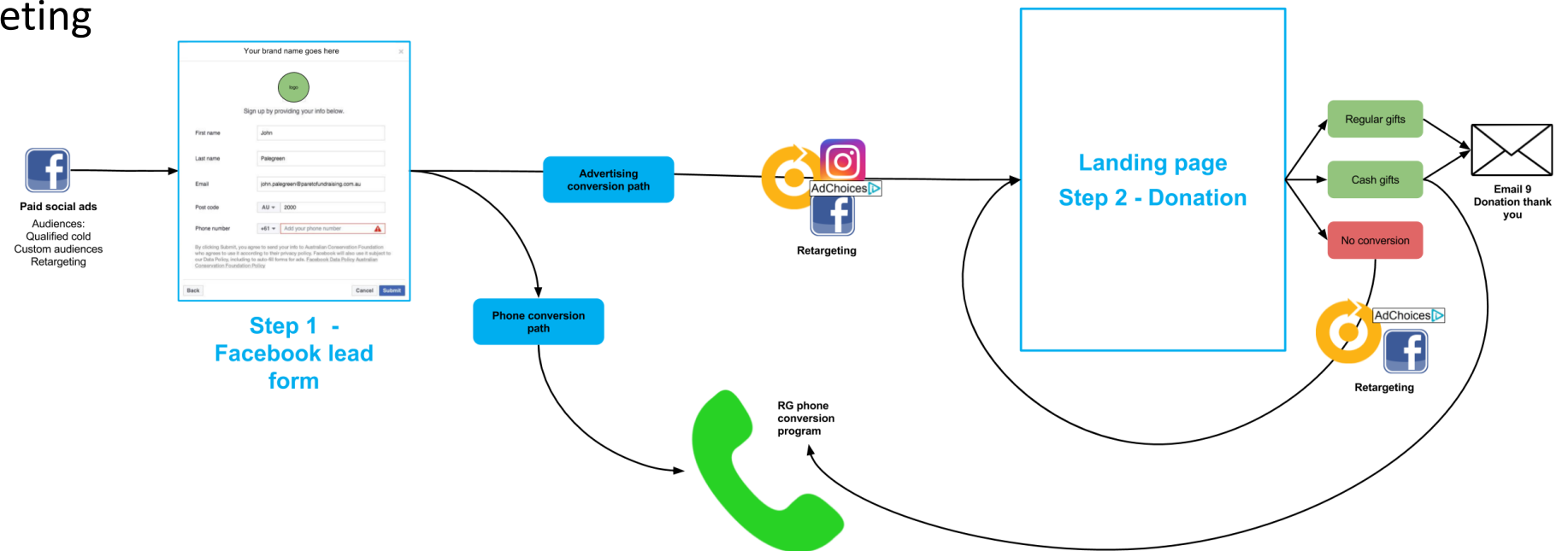
# Low Investment

- Facebook lead form
- Phone conversion
- Thank you email



# Low-Medium Investment

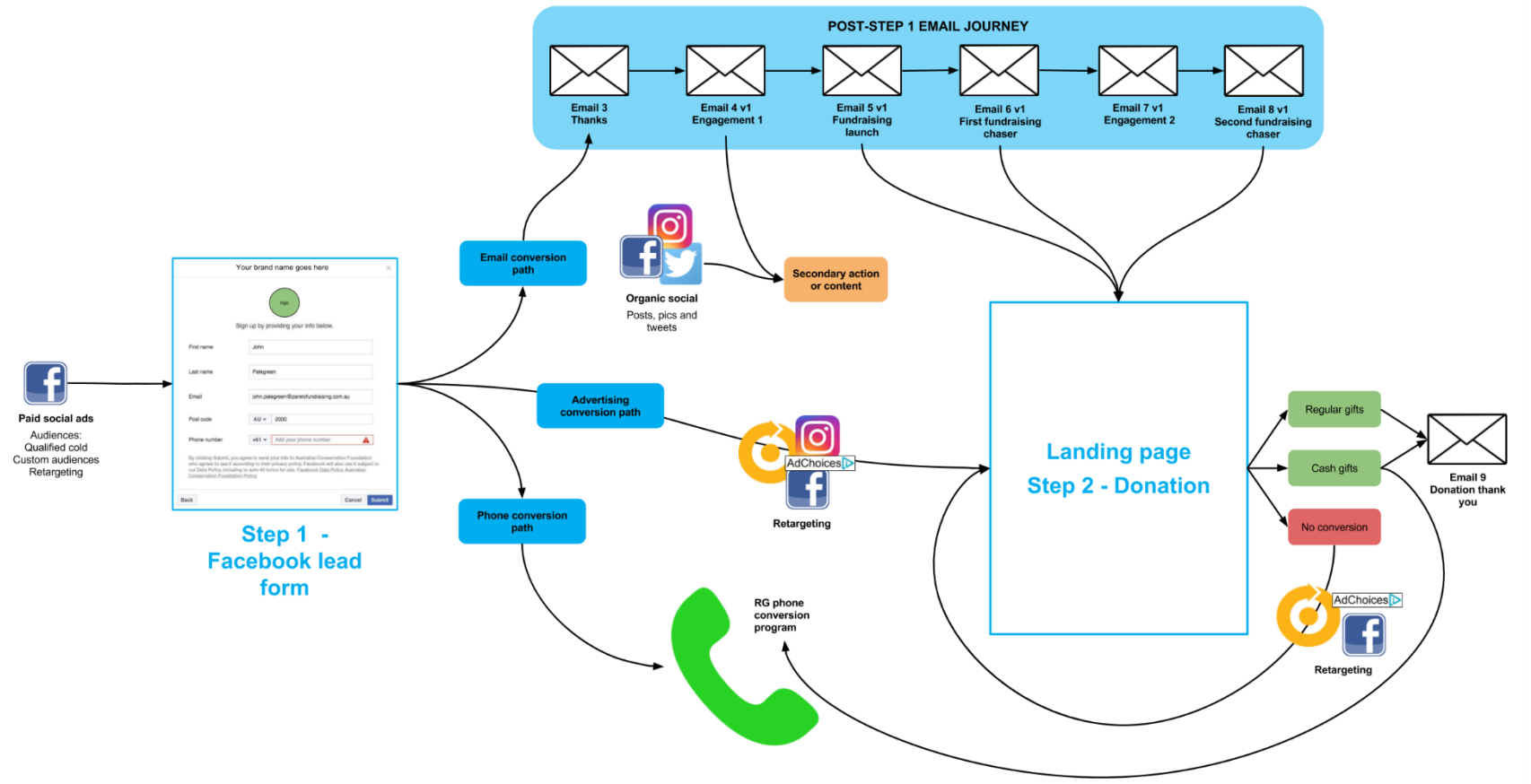
- Facebook lead form
- Phone conversion
- Donation microsite
- Advertising retargeting to donation site





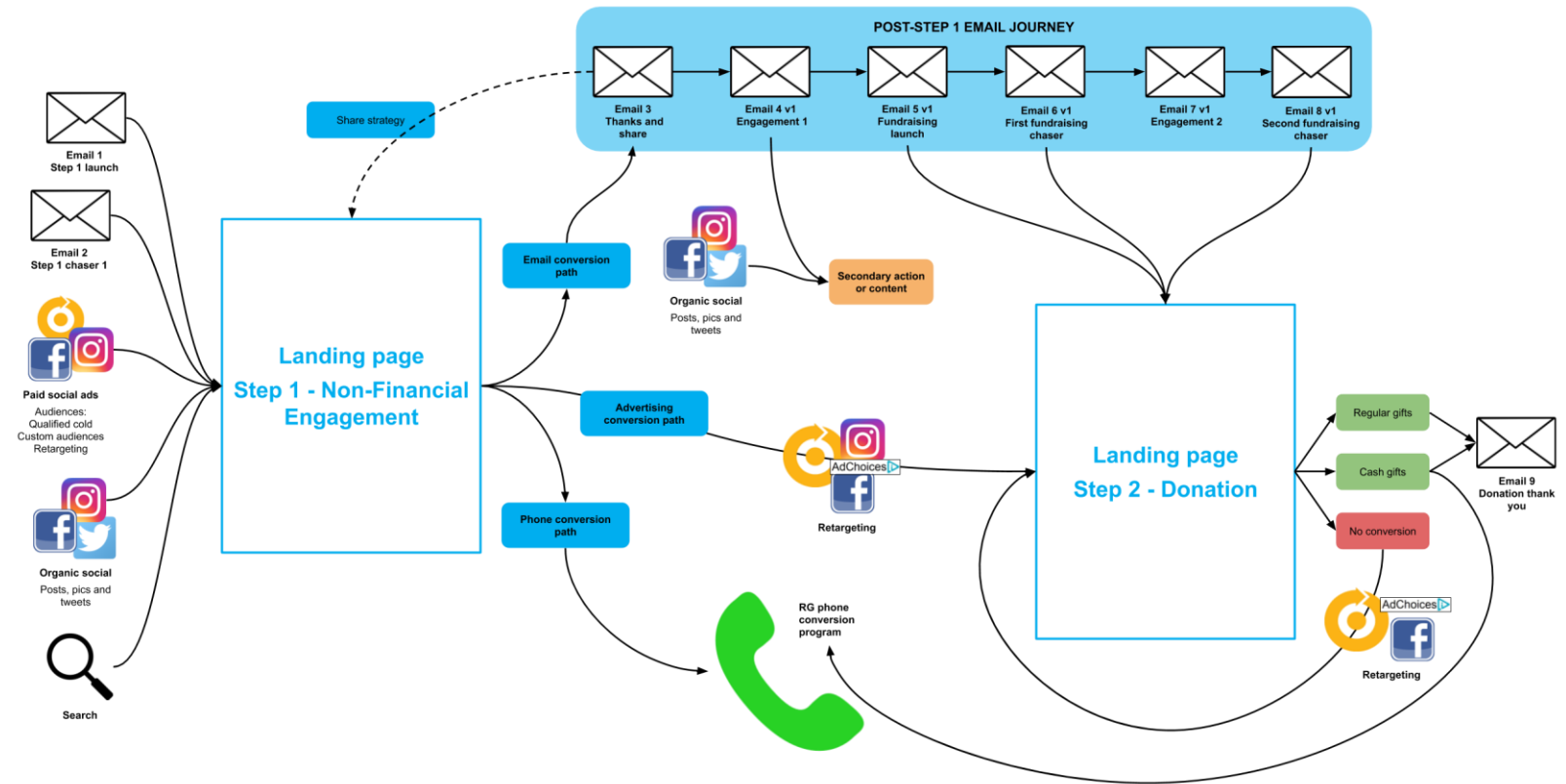
# Medium Investment

- Facebook lead form
- Phone conversion
- Donation microsite
- Advertising retargeting to donation site
- Post-step 1 action email journey



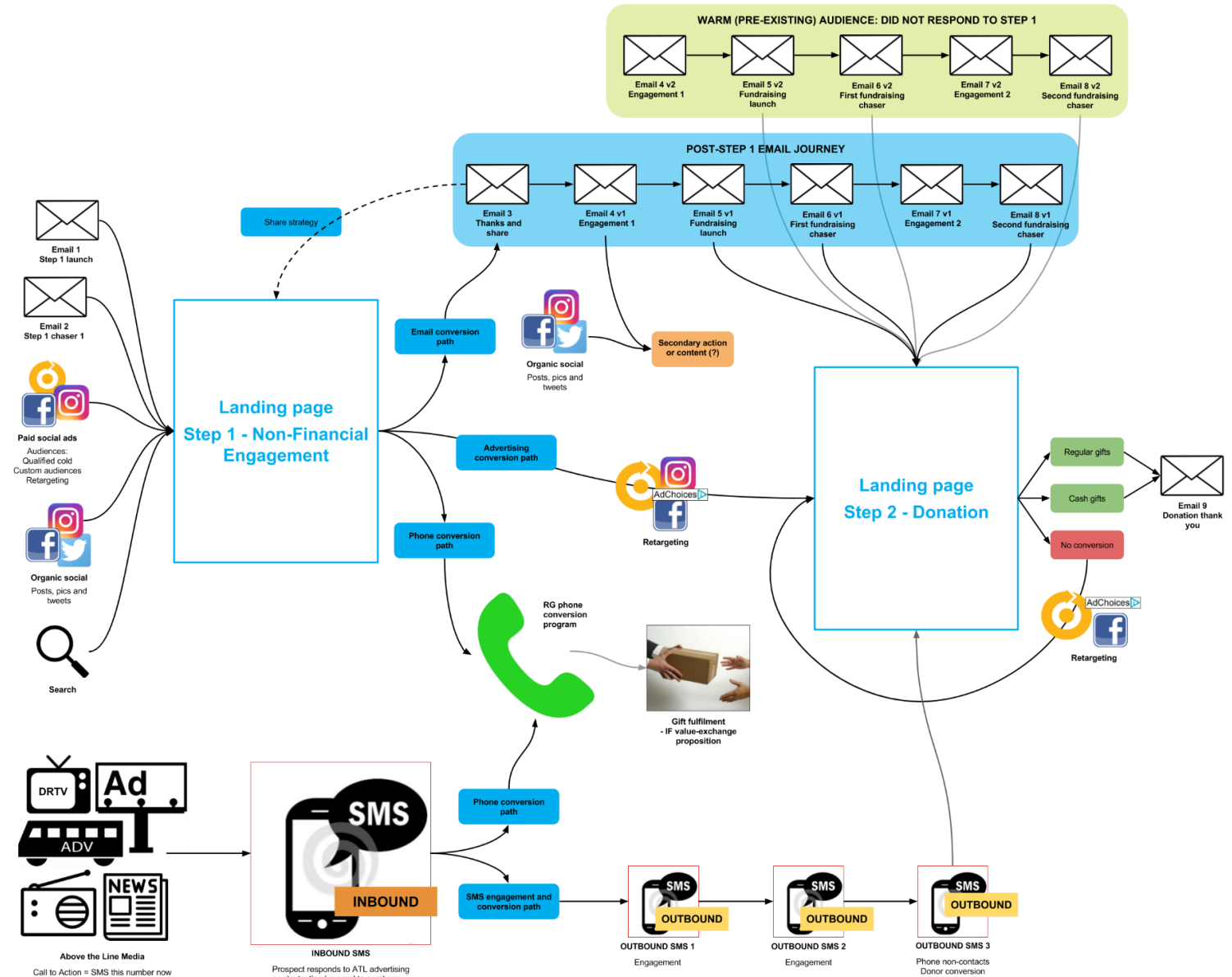
# Medium-High Investment

- Step 1 action microsite
- Phone conversion
- Donation microsite
- Advertising retargeting to donation site
- Post-step 1 action email journey
- Warm audience email journey



# High Investment

- Above-the-line advertising for Step 1
- Inbound SMS response for Step 1
- Step 1 action microsite
- Phone conversion
- Donation microsite
- Advertising retargeting to donation site
- Post-step 1 action email journey
- Warm audience email journey



# Understand Motivators and Channels



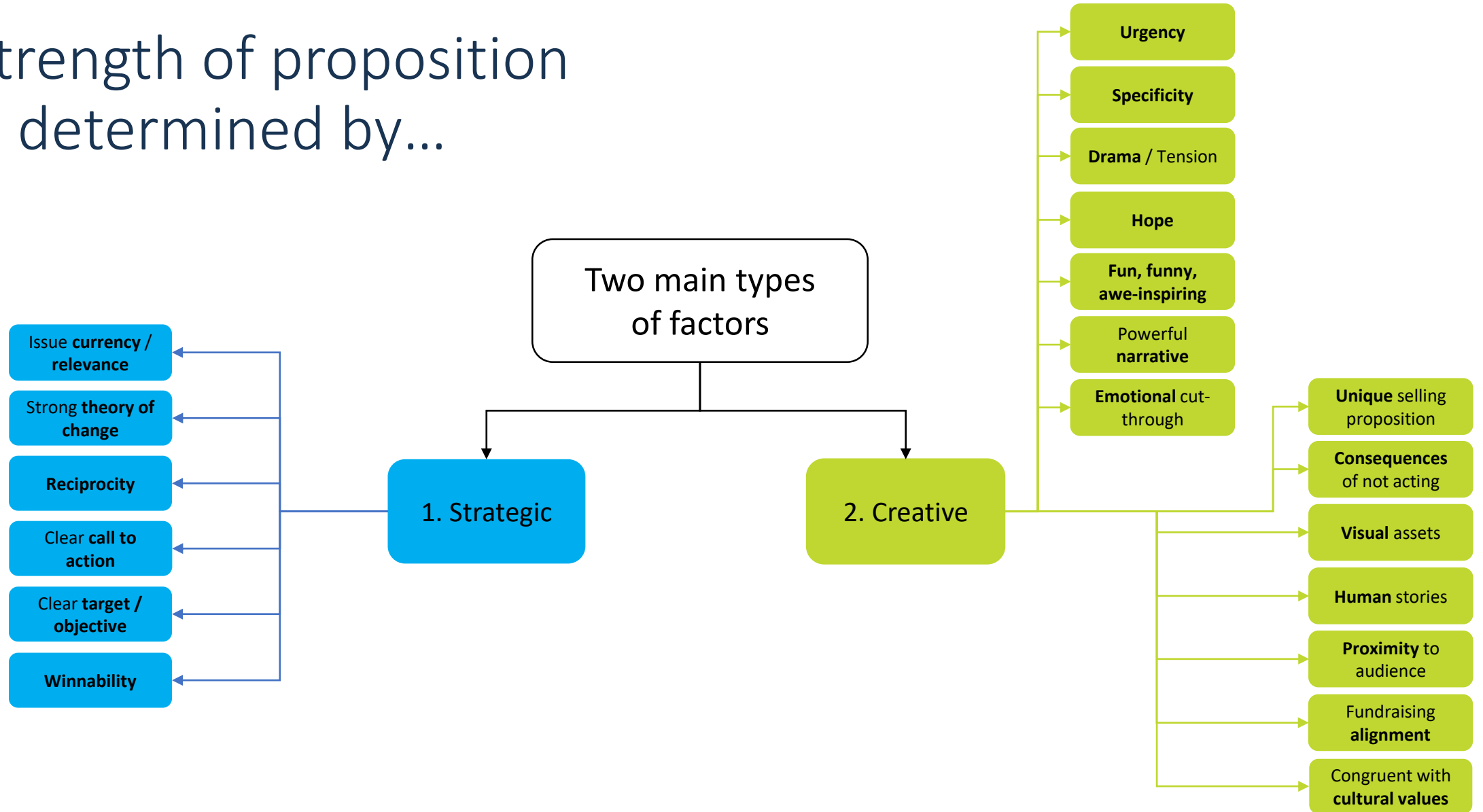
# 2. Proposition

What Makes for a Successful 2 Step Campaign?

# The Proposition

***“Take **X action** to achieve **Y outcome**”***  
*(usually but not always “for **Z beneficiary**”)*

# Strength of proposition is determined by...



## EXERCISE 2

## REFINE ONE CAMPAIGN IDEA

- 1. Choose one of your campaign propositions and refine**
  - If you have time, add a level of consumer-facing messaging.
  - Eg what would the first paragraph/s on your campaign landing page say?
- 2. Share with your table**
  - Suggest and discuss possible refinements
- 3. Each table shares one or two with the room**

### Strategic factors

Issue **currency / relevance**

Strong **theory of change**

**Reciprocity**

Clear **call to action**

Clear **target / objective**

**Winnability**

### Creative factors

**Urgency**

**Unique** selling proposition

**Specificity**

**Consequences** of not acting

**Drama / Tension**

**Visual** assets

**Hope**

**Human** stories

**Fun, funny, awe-inspiring**

**Proximity** to audience

**Powerful narrative**

**Fundraising alignment**

**Emotional** cut-through

**Congruent** with cultural values



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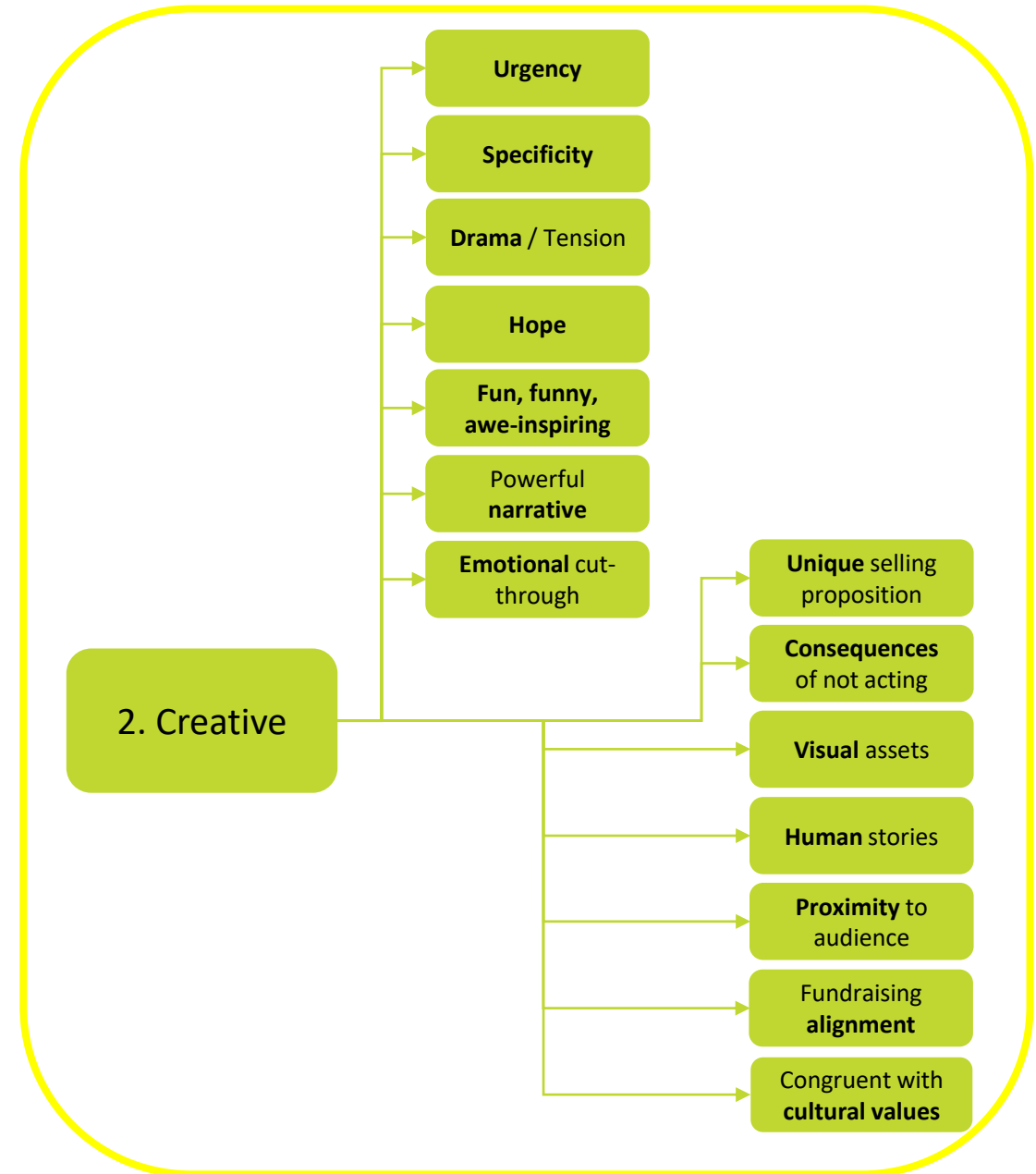
## f) Diversity

# 3. Execution

What Makes for a Successful 2 Step Campaign?

# Creative Execution

Important creative factors for **execution** are the same as for the **proposition**



# Good Online Content

## Rules for good online content

- Supporter- and beneficiary-orientation: You are the conduit; the supporter is creating the change
- Show supporter impact (theory of change)
- Beneficiary stories and quotes
- Descriptive
- Empathy-building
- Images of beneficiaries that allow the supporter to connect (eg framed on a face, eyes to camera)
- Human language - kill long words that program people love
- Always align with a relevant, related action
  - Always ask “If someone’s interested in this, what do we want them to do”?

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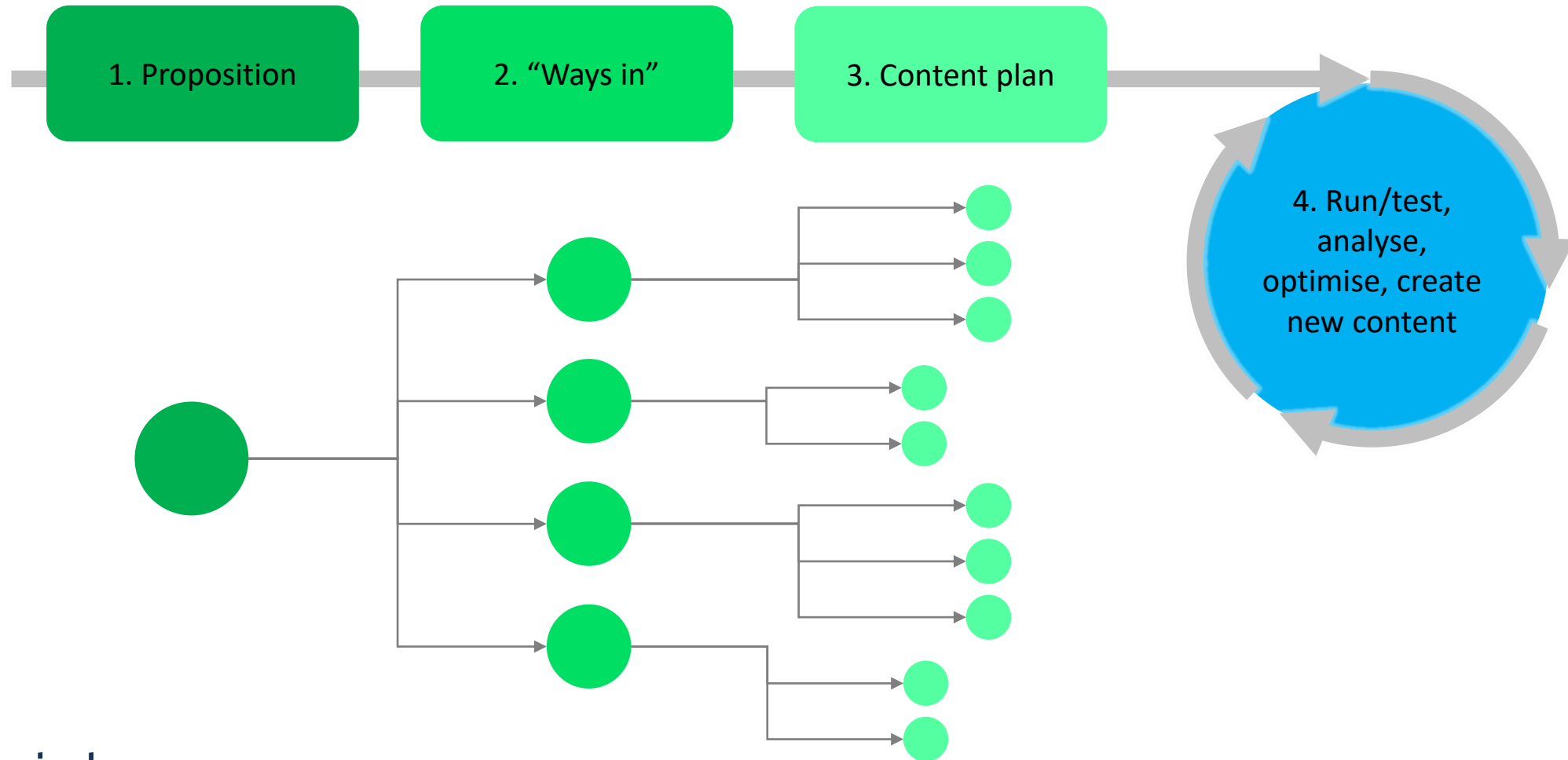
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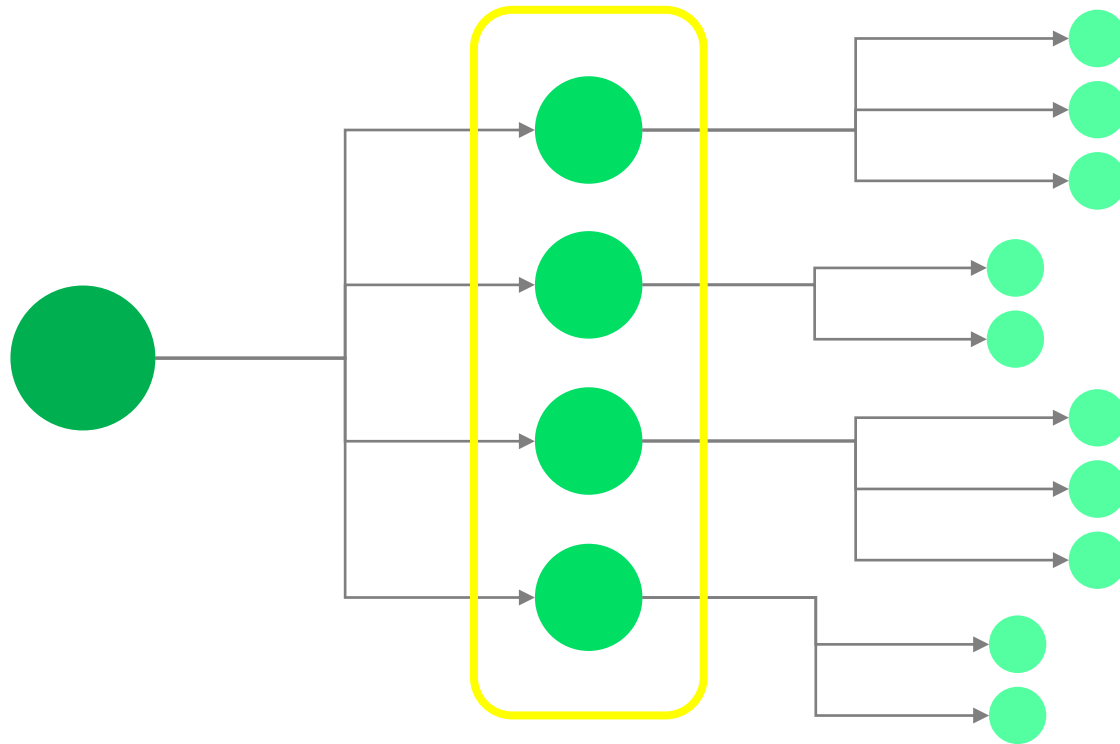
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# Content Planning and Management



# “Ways in”

Different messaging angles that can be used in content and advertising driving to the singular campaign proposition.



## EXERCISE 3

## THREE 'WAYS IN'

1. **Develop 3+ ways in for your chosen proposition**
2. **Share with your group**
  - Suggest and discuss possible refinements
3. **Each group shares three ways in with the room**

**“Ways in”:** Messaging angles that can be used in content and advertising driving to the singular campaign proposition.



# Content Matrix

Proposition > “Ways in” > Content matrix > Content schedule

Example: Online campaign about female ranger program in Zimbabwe

FB Standard ads					
Way in	Post/ Ad #	Format (unless test is a format test)	Test question/hypothesis	Test version	
				A	B
Individual workers	1	Link - Petrona's story	Link in text served to less people due to fb algorithm	no link	link
	2	Link - Primrose's story	Does copy on image affect click through rate	copy on image	no copy on image
	3	Link - Dimbal's story	Click through rate of button	learn more	donate now
	4	Carousel/Slideshow - Why the women do their job	Which ad type performs better	Carousel	Slideshow
Feminsim	5	Link - Stand with her	Does copy on image affect click through rate	copy on image	no copy on image
	6	Link - The job is not for a woman	Audience connection with group vs individual image of women	group of women	individual
Animals	7	Carousel - Protecting animals	Click through rate of button	learn more	sign up

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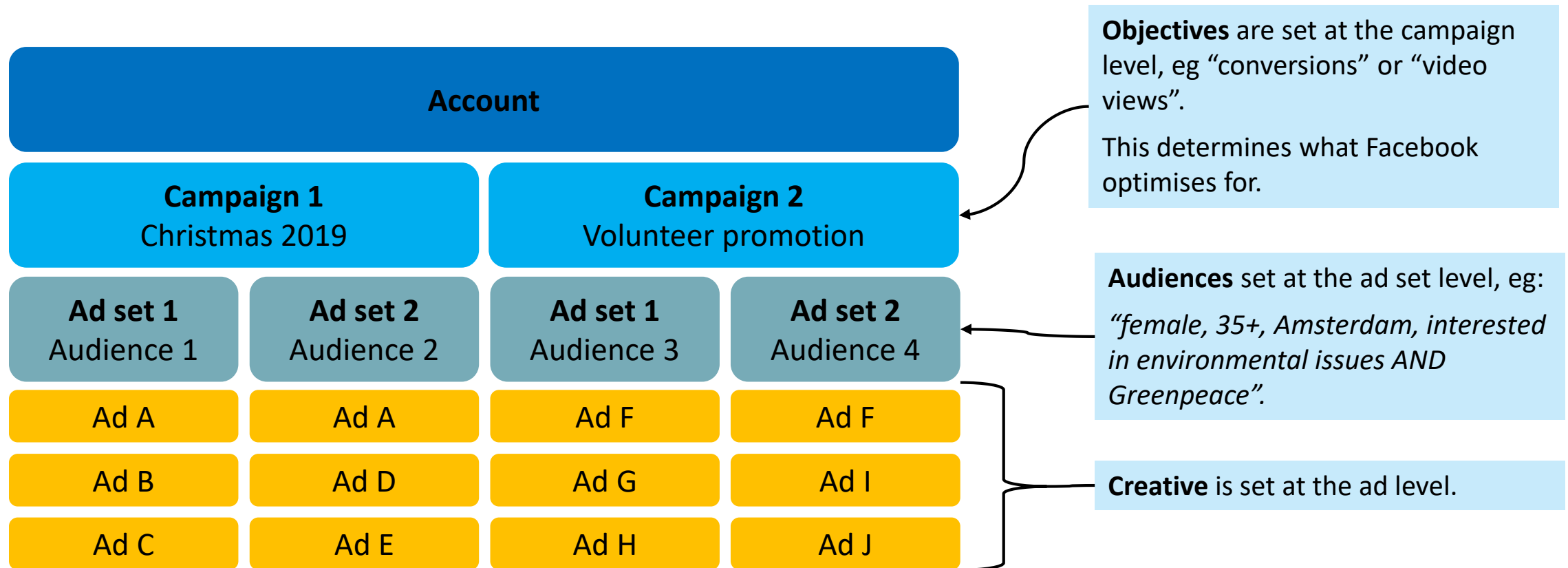
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# Fb Advertising: Campaign Structure



# Facebook Optimisation

## Campaign optimisation

Skewing spend to best performing ad sets in a campaign (metric = CPL)

## Ad set optimisation

Skewing spend to best performing ads in an ad set (metric = CPL)

### Audience variables:

- Demographics
- Psychographics
- Lookalikes
- Custom audience
  - Website engagement
  - Fb engagement
  - List upload

Lookalike (1%) - loyal RGs	CPL \$3.14	Ad 1 \$1.47	Ad 2 \$2.73	Ad 3 \$5.84	Ad 4 \$2.01	Ad 5 \$4.71
Custom audience - prospects	CPL \$6.22	Ad 1 \$9.43	Ad 2 \$6.74	Ad 3 \$3.14	Ad 4 \$5.70	Ad 5 \$4.87
Promo video watchers (90%)	CPL \$1.94	Ad 1 \$4.12	Ad 2 \$1.03	Ad 3 \$2.12	Ad 4 \$1.35	Ad 5 \$2.24
Female, 35+, likes Greenpeace AND WWF Australia	CPL \$5.17	Ad 1 \$4.87	Ad 2 \$6.20	Ad 3 \$4.95	Ad 4 \$3.89	Ad 5 \$7.18

### Ad variables:

- **Placement**
  - Facebook
    - Newsfeed
    - Right column
  - Messenger
  - Instagram
    - Feed
    - Story
- **Format**
  - Link ad
  - Carousel
  - Video slideshow
  - Video
  - Canvas
- **Creative elements and tests**

# Balancing AI and Intervention

- **Facebook AI is doing more and more of this work**

- Campaign optimisation compulsory
- Broad audience definition, leave optimisation to Facebook

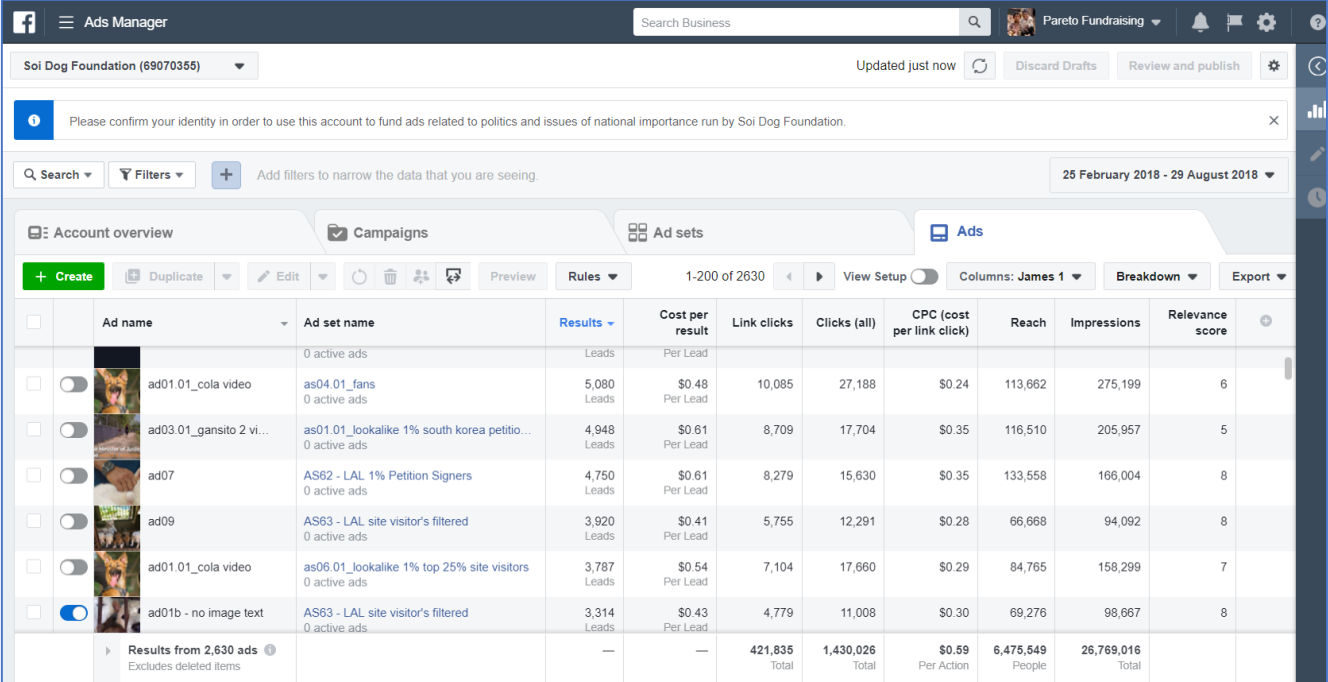
VS

Granular definition

- We always need to check in daily, monitoring and tweaking where necessary

- Keep an eye on:

- Audience fatigue
- Concerning trends (eg CPL increases)
- Opportunities (eg CPL decreases)



The screenshot shows the Facebook Ads Manager interface for the 'Soi Dog Foundation' account. It displays a table of campaign performance data with columns for Ad name, Ad set name, Results, Cost per result, Link clicks, Clicks (all), CPC (cost per link click), Reach, Impressions, and Relevance score. The table lists several active ad sets, including 'ad01.01\_cola video', 'ad03.01\_gansito 2 vi...', 'ad07', 'ad09', 'ad01.01\_cola video', and 'ad01b - no image text'. A summary row at the bottom shows results from 2,630 ads, with a total of 421,835 link clicks, 1,430,026 clicks, and 6,475,549 impressions.

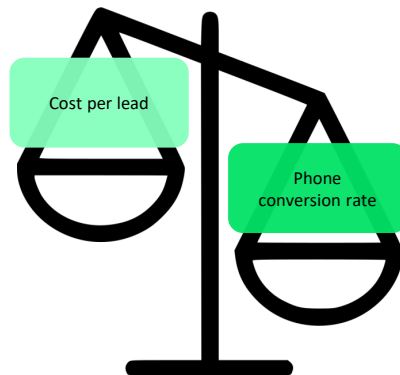
	Ad name	Ad set name	Results	Cost per result	Link clicks	Clicks (all)	CPC (cost per link click)	Reach	Impressions	Relevance score
		0 active ads	Leads	Per Lead						
	ad01.01_cola video	as04.01_fans 0 active ads	5,080 Leads	\$0.48 Per Lead	10,085	27,188	\$0.24	113,662	275,199	6
	ad03.01_gansito 2 vi...	as01.01_lookalike 1% south korea pettio... 0 active ads	4,948 Leads	\$0.61 Per Lead	8,709	17,704	\$0.35	116,510	205,957	5
	ad07	AS62 - LAL 1% Petition Signers 0 active ads	4,750 Leads	\$0.61 Per Lead	8,279	15,630	\$0.35	133,558	166,004	8
	ad09	AS63 - LAL site visitor's filtered 0 active ads	3,920 Leads	\$0.41 Per Lead	5,755	12,291	\$0.28	66,668	94,092	8
	ad01.01_cola video	as06.01_lookalike 1% top 25% site visitors 0 active ads	3,787 Leads	\$0.54 Per Lead	7,104	17,660	\$0.29	84,765	158,299	7
	ad01b - no image text	AS63 - LAL site visitor's filtered 0 active ads	3,314 Leads	\$0.43 Per Lead	4,779	11,008	\$0.30	69,276	98,667	8
Results from 2,630 ads Excludes deleted items			—	—	421,835 Total	1,430,026 Total	\$0.59 Per Action	6,475,549 People	26,769,016 Total	

# Optimising Whole Campaign Results

ROI is determined by **(a) cost per lead** and **(b) phone conversion rate** together.

Audience	Cost per lead	Phone conversion rate	Cost per CG
Audience 1	€1.34	8.20%	€102.38
Audience 2	€4.45	14.00%	€94.14
Audience 3	€2.37	10.60%	€94.15
Audience 4	€3.70	13.10%	€91.80

So how do we optimise (1) cost per lead and (2) phone conversion rate together?



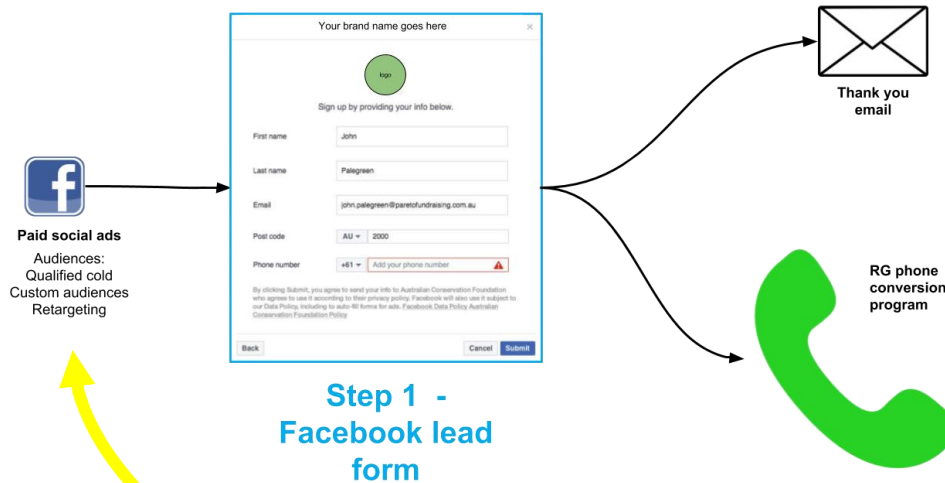
# Lead Gen Audience Optimisation by Phone Conversion Rate

**How do we optimise (1) cost per lead and (2) phone conversion rate together?**

1. Pass audience identifier for each lead through to phone room
2. Tally conversion results for each audience dynamically
3. Feed this back to Facebook audience targeting

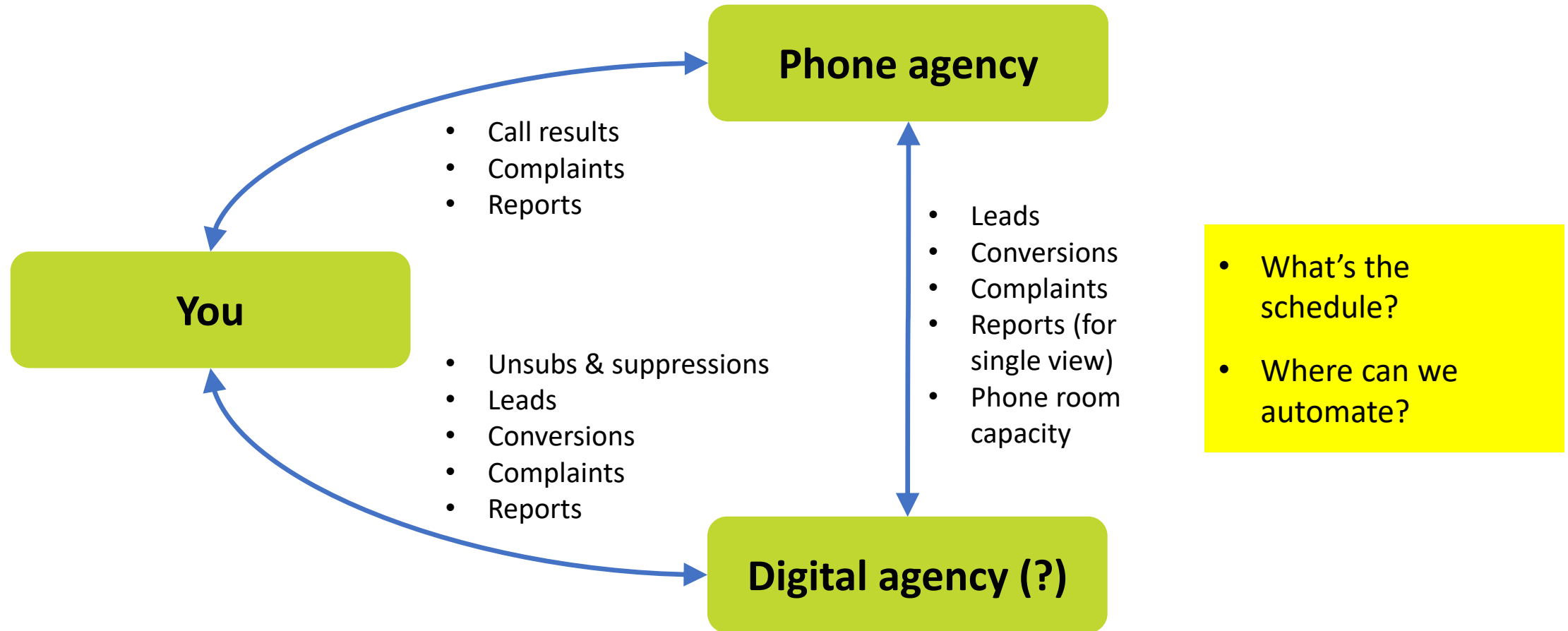
**The most expensive leads *may* get you the lowest cost per RG!**

You ***must*** constantly measure and adjust.



Audience	Phone conversion rate
Audience 1	8.2%
Audience 2	14.0%
Audience 3	10.6%
Audience 4	13.1%

# Data Processes are VITAL





# Workshop Plan

## 1. Fundamentals

- a) Community and engagement
- b) Cross-organisational benefits

## 2. Examples and case studies

## 3. Lead gen proposition and action types

## 4. What determines 2 step campaign success?

- a) Strategy and supporter journey
  - i. Proposition testing
  - ii. Channel investment
  - iii. Understanding motivators and channels
  - iv. Audience strategy

## b) Proposition

- i. Strategic and creative factors

## c) Execution

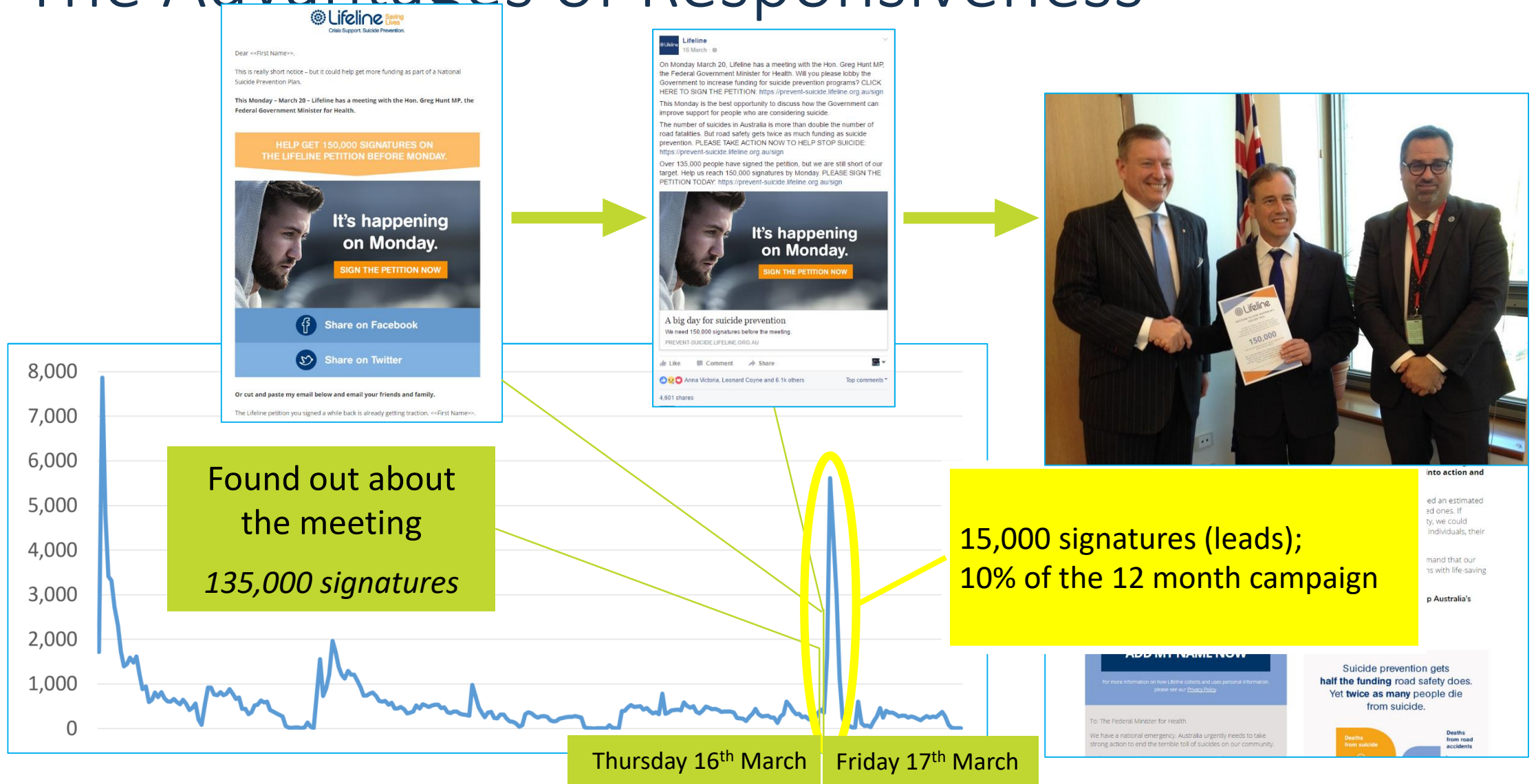
- i. Creative execution
- ii. Content planning and management
- iii. Social advertising campaign management
- iv. Technical production
- v. Calling program

## d) Responsiveness

## e) Community

## f) Diversity

# The Advantages of Responsiveness



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## f) Diversity



Universal Laws  
of Digital

## Community

- Around your organisation AND/OR
- Around your cause

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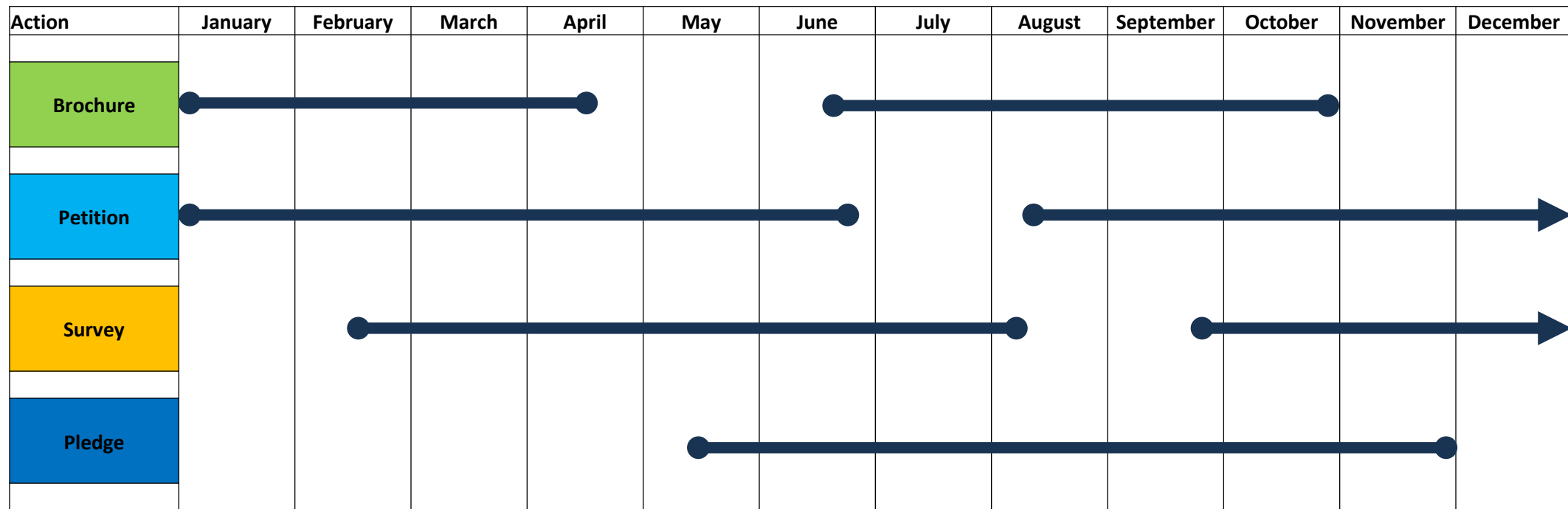
## d) Responsiveness

## e) Community

## f) Diversity

# Your Vision: A Diverse, Strong Acquisition Stream

- A robust acquisition stream that provides a reliable, weekly flow of donors
- Portfolio of lead acquisition actions
- Actions can be rested when fatigued; We can stop old actions and start new ones as appropriate



Thank you.

**mind**  
**wize**