

Three short black lines radiating from the top-left corner of the white box.

FOR GETTHRU CLIENTS

Education Strategy Guide



It's not a secret that texting and calling is the best way to get a hold of someone. Peer-to-peer communication is the best way to get people's attention and build meaningful relationships with them.

It's also not a secret that fundraisers are always trying to do more with less. Raise more money, acquire more donors (and keep them!), and secure more donations. At the same time, it's scary to come up against big goals while working with less—less budget, less certainty that traditional channels will yield results, and even less staff capacity. The good news is GetThru is here to help.

This strategy guide is for any fundraiser who's ever been frustrated with fundraising technology that's dated, expensive, or difficult to use. ThruText is the best-in-class solution that's actually easy to use, and won't break the bank. Read on for tips on everything from getting your new texting program approved and budgeted, to strategy and messaging guidelines, use cases, reporting, and more.

Good to know:

Best practices for getting started

Regardless of your P2P texting use cases, it's important to build consensus around best practices at your institution. Every organization is different, but here are our recommended must-haves that we've gleaned from serving some of the best fundraising programs in the country.

- **Data tracking**

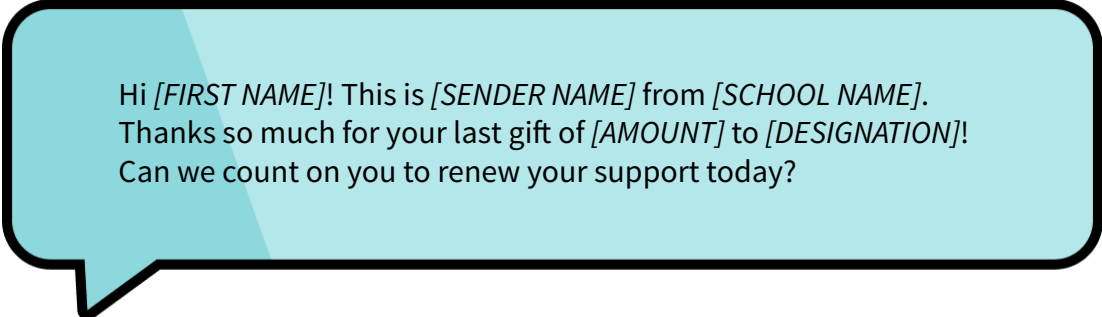
While ThruText does not presently integrate with fundraising CRMs, there is a way to ensure that you're able to track data based on your constituent ID number. Simply create a Custom Field in ThruText for your constituent ID equivalent, and make sure that field is marked as exportable in ThruText. That way, your institution's ID number for each person texted will show up on your reports—making contact reports, fulfillment tracking, and more a breeze.

- **Engagement and stewardship**

You know the old adage—if you only text for solicitation, you're not going to get any participation. (That is not an old adage: we made it up.) But it's true! You'll want to be sure that texting is an authentic channel that your donors feel connected to. Avoid making every text outreach solicitation-based, and mix in engagement and stewardship messaging so that your donors and alumni think of texting simply as a channel to stay connected with their alma mater.

- **Avoid worst practices**

We're talking about best practices here, but you might also be wondering if there's any bad habits you should avoid. For one, personalization is key. Also, you'll want to leave that giving page link out of your initial message—text carriers are much more likely to flag initial messages if they include a link, especially a shortened one like a bit.ly. Instead, you should personalize your texts using ThruText custom fields & ask a question to prompt engagement. Here's an example:



Hi *[FIRST NAME]*! This is *[SENDER NAME]* from *[SCHOOL NAME]*.
Thanks so much for your last gift of *[AMOUNT]* to *[DESIGNATION]*!
Can we count on you to renew your support today?

Good to know:

Best practices for getting started

- **Training**

One of the best ways to ensure a successful program is to prioritize getting your team trained on ThruText. Scheduling an onboarding with our Client Success team will get you and your colleagues quickly up to speed on how to use the tool, best practices, and ensuring your basic account settings are configured. ThruText accounts always come with unlimited technical and strategic support—reach out to our Support team at support@thrutext.io for technical questions, or get in touch with your account manager to discuss strategy, messaging, and campaign planning. Don't know who your account manager is? Just write to sales@getthru.io and we'll get you to the right place.

- **Align with campus partners**

It never hurts to give campus partners a heads up when onboarding ThruText or any new tool. Consider notifying any public-facing departments so they can answer questions from alumni who might be receiving a text from you for the first time. Additionally, if your campus has a central communications calendar, note your texting campaigns there just like you might for a direct mail, email, or phonathon campaign. And on that note...if there are departments on your campus that might benefit from working with ThruText, let them know about the tool! If your campus is doing high-volume texting, you may benefit from volume discounts, especially if you can get together with one or more departments to split a pre-pay.

- **Make texting a strategic part of your outreach**

While texting is a newer channel, it's still just that—a channel. As you're building out your program, think about the ways in which you can integrate ThruText into your existing plans beyond just major events like Giving Days. For example, if you have a spring direct mail campaign, consider sending a text when your piece is scheduled to hit mailboxes, asking donors if they received their letter and if they have any questions about renewing their gift.

- **Prep your texters with a strong script**

One thing that texting has in common with phonathon: a great script will take you far. Beyond just writing a great initial message as discussed above, using ThruText's recommended reply feature to build out your script will ensure that you and your texters can quickly respond to donors.

- **Keep it fun, keep it authentic**

Texting is not email or direct mail—you don't have to use super-formal language. Of course, you should always be professional and respectful, but with texting you have more room to speak to your donors as you might when in the room with them at an event. Pro tip: if your senders are student workers, recruit your students to help you write your scripts. And don't forget to use emoji! Bonus points if you can use emoji that evokes your school's mascot or colors.

Building Your Strategy



Like any fundraising channel, texting works best when it's part of an integrated strategy. We recommend aiming to weave texting in with existing campaigns and other channels - for example, making sure that your Giving Day texting complements your overall strategy for the day. To help give you some inspiration on where texting might fit in, check the calendar below.

Month	Text Type	Outreach	Notes
January: Kick off the calendar year strong	Solicitation	Monthly donor renewals	Send a text to monthly donors with expired credit cards, asking them to renew their support.
	Stewardship	Thank you message	Send a thank you to donors who gave during your calendar year-end campaign.
	Engagement	Future donor engagement	Send a text to senior class, letting them know about upcoming senior class giving events.
February: Show your donors some love	Stewardship	Valentine's day	Let your donors know how much you appreciate your support. Consider expanding your segments to donors who gave over the last several fiscal years, to reengage SYBUNTs ahead of upcoming solicitations.
March: Giving Day-palooza!	Engagement	Pre-Giving Day	A few weeks before Giving Day, send an engagement text. This can be a simple campus update, an offer for a digital asset or swag, or any kind of engagement.
	Solicitation	Giving Day	Reach out to donors for save the dates, as well as day-of solicitations.
	Stewardship	Post-Giving Day	Send a thank you message to all Giving Day donors. Be sure to share the final total of dollars raised, and how donor support will make an impact!

Month	Text Type	Outreach	Notes
April: Phonathon fun	Engagement	Pre-phonathon outreach	Write to your call list, letting them know to expect your call. Consider making a soft ask in case any donors would prefer to give online.
	Solicitation	Phonathon follow-up	Follow up with donors who usually give by phone who you weren't able to reach, asking them to renew their support.
	Solicitation	Phonathon follow-up	Follow up with donors who pledged to give by phone, offering to send them the link to give online.
May: All engagement, all the time	Engagement	Choose your own engagement adventure!	It's important to avoid oversoliciting your audience on any channel, including texting! Consider making May your month of engagement - you could text alumni and donors to keep them in the loop on spring events, or send an informal poll to your donors and ask why they give. Pro tip - use their answers to create a word cloud to share on social media!
June: Fiscal year end	Stewardship	End of fiscal year	Text all donors who gave this fiscal year, thanking them for their support. Consider including a soft second ask, especially for leadership donors or giving society members.
	Solicitation	End of fiscal year	Reach out to LYBUNT & SYBUNT donors to ask for their support before FYE.
	Pledge Fulfillment	End of fiscal year	Reach out to all donors who pledged on any channel, asking them to fulfill their gift before the year is over. Pro tip: use ThruText custom fields to remind them of their pledge date, amount, and designation.

Month	Text Type	Outreach	Notes
July: Connect with new alumni	Engagement	Recent grad outreach	Text recent grads to collect their updated address and offer to send them a premium/swag.
August: Stay in touch	Engagement	Back to school	Send news from campus as students return for fall classes.
September: Homecoming!	Engagement	Homecoming/ reunion	Make sure donors are invited to homecoming, and let folks know about class reunion giving challenges.
	Solicitation	Homecoming/ reunion	Write to donors in reunion year, asking them to make a gift in honor of their class. Bonus points if you can recruit class agents as volunteer texters!
	Stewardship	Homecoming/ reunion	Thank Homecoming attendees, and/or donors who made a gift as part of their reunion year class challenge.
October: Check your mail	Solicitation	Direct mail follow-up	Let folks know that they should expect to receive mail from you and ask if they'd prefer to give online.
November: Final calendar year-end preparations	Stewardship	Holiday outreach	Send a note saying happy holidays - this works especially well for assigned prospects.

Month	Text Type	Outreach	Notes
December: Calendar Year-End	Solicitation	Giving Tuesday	Make texting a part of your Giving Tuesday efforts to boost response rates and giving.
	Solicitation	CYE pledge fulfillment	Reach out to all donors who pledged on any channel, asking them to fulfill their gift before the year is over. Pro tip: use ThruText custom fields to remind them of their pledge date, amount, and designation.
	Solicitation	CYE renewals	Reach out to all LYBUNTs and SYBUNTs, asking them to renew their gift before the year ends.
	Solicitation	CYE specialized asks	Does your institution have special interest segments? Texting is a great way to personalize messaging to these groups without having to spend a ton of time. Consider reaching out to parents, athletics, programmatic, or other donors with specific giving interests.
	Stewardship	CYE thank you	Send all calendar year donors a Happy New Year message on or after New Year's Eve, thanking them for their support.

Top Ten Texting Campaigns for Annual Giving

While there are countless use cases for P2P texting in the world of fundraising, we want to highlight ten types of campaigns that we've seen make the biggest impact for our clients.

1

Stewardship

Texting is a great way to add an additional personal touch to your stewardship outreach, and can start a conversation that leads to a deeper connection between your institution and donors.

Potential segments:

Donors from last fiscal year, first time donors, repeat donors, recent donors.

Sample initial message:

Hi [First Name], this is [Sender First Name] from [School Name]! Thank you so much for your last gift of [Amount] to [Designation]. It's so meaningful when alumni show their support of our alma mater. What inspires you to give?

2

Monthly Donor Renewals

Monthly donors are some of your most reliable supporters and it's important to keep your retention game fresh. You can use ThruText to reach out to monthly donors to ask that they renew their monthly support.

Potential segments:

Monthly donors with expired credit cards or lapsed gifts.

Sample initial message:

Hi [First Name], this is [Sender First Name] from [School Name]! Thank you for your ongoing support of our alma mater through your generous monthly gift. I'm reaching out to let you know the credit card we had on file looks to be expired - can I send you a link to add a new card?

3

Giving Day

Sending a save the date is a great way to help your audience get ready for Day of Giving, and P2P texting helps leverage other channels throughout the big day. We feel so passionate about the usefulness of P2P texting that we wrote a dedicated piece about it - check that out [here](#)

Potential segments:

LYBUNTs, SYBUNTs, acquisition list, senior class gift outreach list, alumni in reunion year, parents, last year's giving day donors.

Sample initial message:

Hi *[First Name]*, this is *[Sender First Name]* from *[School Name]*! Today is the big day - it's our day of giving! Together, we're counting on our community to come together to help us reach our goal of *[Amount]* to help support *[case for support here.]* Will you consider renewing your last gift of *[Amount]* today?

4

Fiscal Year-End

While your donors might not always appreciate the importance of fiscal year end, as fundraisers we know that pulling out all the stops can be a game-changer for smashing participation and dollars goals. Texting is a great add-on here, especially given the ability to spin up a campaign in minutes on ThruText - allowing you to target the areas most in need of support at a critical time. Following is some quick inspiration for texting at FYE, but check out more [here](#)!

Potential segments:

Donors with open pledges, 2nd ask candidates (for example, leadership donors), donors who gave last fiscal year but not this fiscal year, affinity donors that might be interested in matching gift opportunities.

Sample initial message:

Hi *[First Name]*, this is *[Sender First Name]* from *[School Name]*! I wanted to personally thank you for your recent gift of *[Amount]* to *[Designation]*. We are super close to hitting our fundraising goal of *[Amount]* by *[Date]*. Would you consider making an additional gift to help us get there? Even \$25 helps!

5

Engagement & Events

The more connected your alumni are to your institution, the more likely they are to stay involved and make a gift. Plus even if someone doesn't give – you still want them to be an advocate for your alma mater! We're firm believers in using texting for engagement use cases: it makes the channel more authentic, and helps make text solicitations feel more organic. Check out some further best practices [here](#).

Potential segments:

Alumni/outgoing seniors (ask for updated contact and/or employment info), alumni chapter members, parent/alumni volunteers, event invitations.

Sample initial message:

Hi *[First Name]*, it's *[Sender Name]* from the alumni office at *[School Name]*. We're so excited to celebrate your graduation with you! While campus will always be your home away from home, we want to keep in touch. Can I send you a link to update your contact info?

6

Pledge Reminders

The best part of pledges: closing them! Sending a text to remind your donors of their pledges and providing a fulfillment link is a convenient way to ensure those pledge dollars are realized.

Potential segments:

Donors who have pledged via any channel (phone, mail, email, etc.)

Sample initial message:

Hi *[First Name]*, *[Sender Name]* from the *[School Name]* call center here. Thank you for chatting with me tonight, and for your pledge of *[Amount]* to *[Designation]*! Can I send you a link to fulfill your pledge?

7

Giving Tuesday & Calendar Year-End

The most wonderful time of the year: calendar year-end giving season! This critical time is kicked off with Giving Tuesday, and texting can help amplify your efforts on the big day. You can read further GetThru approved Giving Tuesday strategy suggestions [here](#). Additionally, consider weaving texting into your CYE plan to complement your email, direct mail, and phone outreach plans

Potential segments:

Donors who usually give on Giving Tuesday or at calendar year-end, LYBUNTs or SYBUNTs who haven't given this year, acquisition list.

Sample initial message:

Hi [First Name]! This is [Sender Name] from [School Name]. Today is Giving Tuesday, and your support is more important than ever. Last year you gave [Last Gift Amount] - can we count on you to renew or increase that today?

8

Direct Mail Follow-Up

Send a text to all direct mail recipients, letting them know they should expect to receive a letter from your institution.

Potential segments:

All expected direct mail recipients, or half your list so you can A/B test how texting increases direct mail ROI.

Sample initial message:

Hi [First Name]! This is [Sender Name] from [School Name]. Keep an eye on your mailbox - we've sent you a letter from [School Dean Name] with an update from campus. I hope you'll check it out!

9

Phonathon

Texting is a great booster for all channels, and it's a natural complement to your phone program. There are a variety of use cases, whether sending pledge follow-ups or even as a digital engagement tool for shops that are moving from the traditional phonathon model to that of a digital engagement center.

Potential segments:

Donors you haven't been able to reach by phone, donors who pledged by phone but haven't given, or donors who normally give by phone.

Sample initial message:

Hi *[First Name]*! This is *[Sender Name]*, a student caller at *[School Name]*! We're doing something a little bit different this year, and sending texts rather than making calls. Since you usually make your gift by phone, I wanted to make sure to check in. Can I send you a link to renew your last gift of *[Amount]* to *[Designation]*?

10

Crowdfunding

Cause-based fundraising is more popular than ever, and crowdfunding offers a great way to both be donor centric and to ensure that community-led projects garner support. Because crowdfunding often attracts young alumni and first time donors, adding texting to the mix ensures that your case for support finds its audience.

Potential segments:

Previous crowdfunding donors, acquisition list, non-donor parents and alumni, staff.

Sample initial message:

Hi *[First Name]*! This is *[Sender Name]*, a student caller at *[School Name]*! I'm excited to reach out to you and share today about the many crowdfunding opportunities our community is currently spearheading. My personal favorite is *[project name/info]*. With our fundraising deadline coming up, it's a great time to make an impact! Can I send you more information so you can make a gift to the cause most important to you?

Taking a data-driven approach

When bringing on a new tool, it's important to be able to tell the story of its effectiveness—after all, how better to ensure that your texting budget will be renewed or even increased! Luckily, ThruText reports make it easy:

- **Survey exports** produce a CSV of each recipient, all of your survey fields associated with each recipient, and the survey response data collected by texters. Pro tip: include surveys tracking whether people will give, opt-out reason, and refusal reason to track more granular data on the outcomes of your campaign.
- **Message exports** produce a CSV of every outgoing and incoming message sent in the campaign, along with who sent it and the timestamp. This report can be used to create more detailed contact reports—an excellent tool for anyone building a pipeline, as it allows for easy tracking of conversations with your future leadership donors.
- **Conversation exports** produce a CSV of every conversation in the campaign with outgoing/incoming message details as well as the assignee for each conversation.

While ThruText does not track clicks or fulfillment rates, tracking this data is a key way to know which strategies are yielding the best results. Making sure to have an exportable custom field for your constituent ID as discussed above will enable you to pull a list of donors and compare that list against who was texted. You can also use ThruText Surveys to track who said they would give and compare that list against fulfilled donors to make sure gifts come in. Additionally, if your institution uses appeal codes, you may also consider creating one for your texting links.

But let's say you really want to dig in the details to learn what types of strategy and messaging most resonate with your audience. Say it with us now...let's do some A/B testing! There are many ways that you can A/B test your ThruText campaigns to gather data and insight. Here are just a few examples:

- **Direct mail**
Text half your list ask a follow-up to your direct mail campaign and see if donors who also received a text gave at a higher rate
- **Phonathon pledge fulfillment**
Similar to the above, text half of your pledged donors (along with other pledge reminder outreach) and see if those who receive a text on top of other communications give at a higher rate
- **By segment**
What's your best texting audience? You never know until you do some experimenting! Typically, we see LYBUNTs responding at the highest rate to text messages. However, with A/B testing, you can go deeper on various segmentation types (for example, LYBs, SYBs, graduates of the last decade, graduates with particular affinities, etc.) to see if any groups are more likely to give after receiving a text.

Quick Brainstorm - Strategy & Messaging

Below we've created some space for you to unleash your brilliant ideas for what campaigns you might create to reach your fundraising goals with P2P texting. Set a timer for 3 minutes and see how many ideas you come up with!

Campaign Name	Date	Segmentation/Strategy	Sample Initial Message

Conclusion

Ready to dig in deeper? Schedule a time to meet with your account manager to do some customized brainstorming on messaging and strategy for your program. Just write to us at sales@getthru.io and we'll connect you to the right person.