

Apra Partner Webinar

# THE CASE FOR AN ENGAGEMENT-FORWARD APPROACH TO PROSPECTING

## PRESENTED BY

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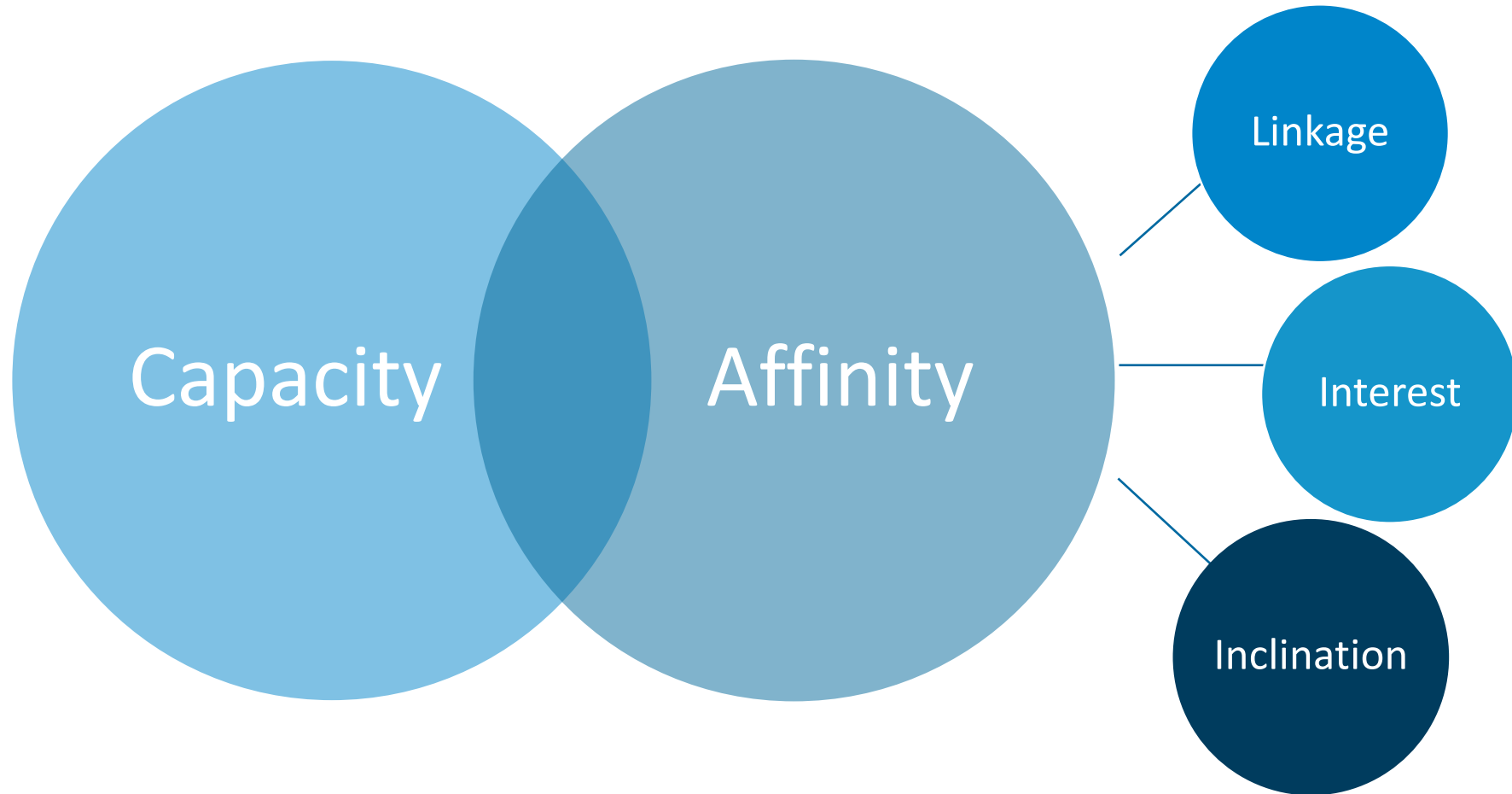
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# WHY MEASURE ENGAGEMENT?

Engagement supports a comprehensive assessment of a qualified prospect



# WHY MEASURE ENGAGEMENT?

Engagement is an inclusive metric that supports a commitment to DEIA



Value gifts at all levels of table



Appreciate generosity of donors rather than amount of their gift



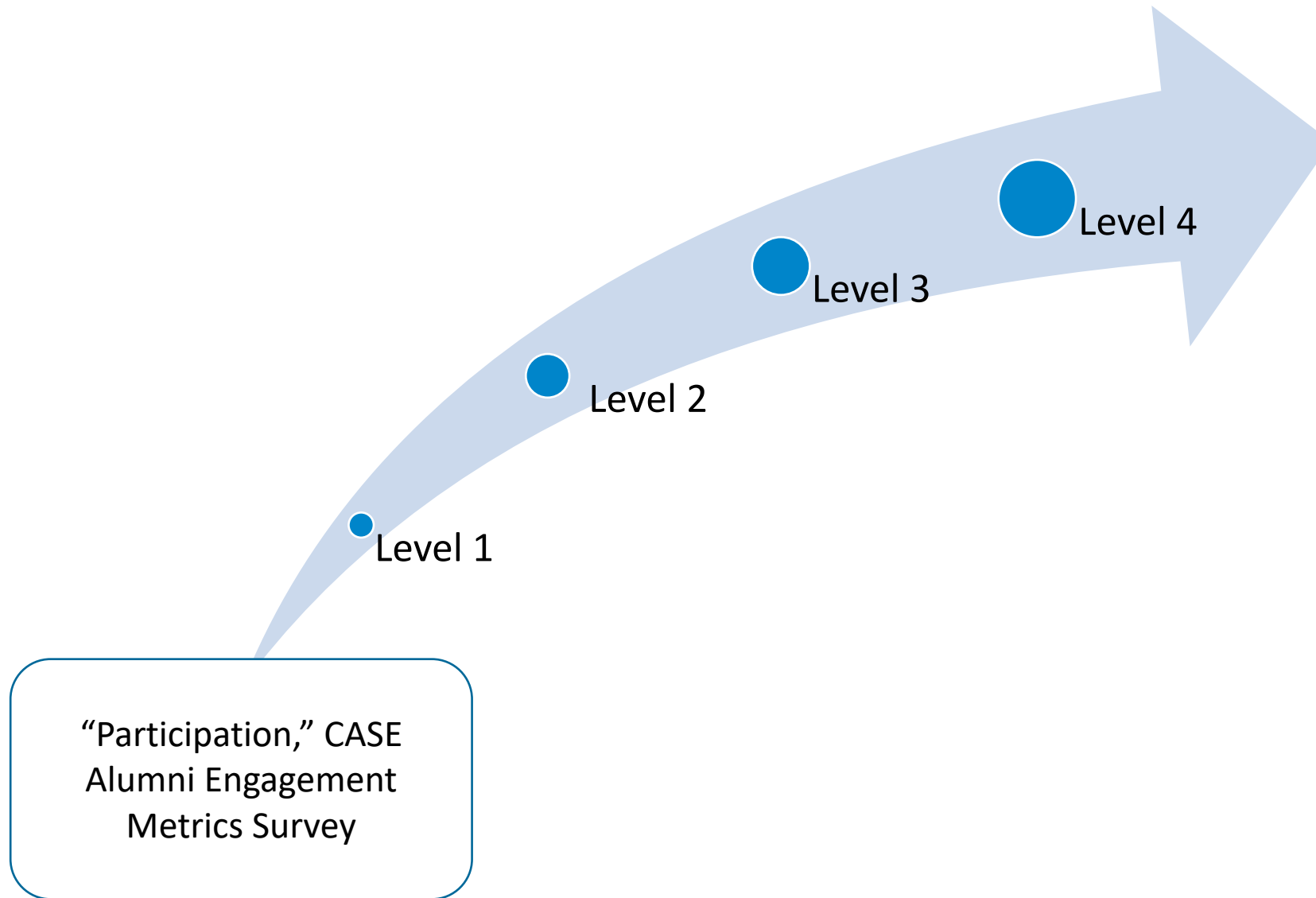
Identify and steward more types of contributions



Identify targets for upgrades at all levels, not just major gifts

# POLL QUESTION

# OVERVIEW OF CAMPBELL'S ENGAGEMENT TRACKING LEVELS



# LEVEL 1

Awards points in each of 5 categories on an annual basis, up to 25 points



**Help**

➤ Award a point per volunteer opportunity, cap of 5



**Go**

➤ Award a point per event, cap of 5



**Give**

➤ Award a point for each of 5 giving questions, e.g. LY, CY, amount above threshold, increase, and PG



**Connect**

➤ Award a point per “meaningful communication,” cap of 5



**Contact**

➤ Award a point for presence of each of 5 means of contact, e.g. phone, email, LinkedIn, Facebook, X

# LEVEL 1 SAMPLE

Engagement Range	Engagement Score	Number of Constituents	Percent of Constituents	Average Score				
				Help	Go	Give	Connect	Contact
Very High	15 - 20	16	.09 %	2.4	4.1	3.6	4.2	3.5
High	10 - 15	170	1.0 %	2.1	2.2	3.2	3.4	2.6
Medium	5 - 9	1019	5.9 %	0.9	2.9	1.2	1.4	2.2
Low	0 - 4	15,975	93.0 %	0.1	0.6	1.1	0.9	1.2
	<b>Total</b>	<b>17,180</b>	<b>100 %</b>					



## LEVEL 2

Weights particular modes of engagement to impact the overall score

**Weight the activity based on:**

### Impact

How much does this enhance the trajectory of the relationship?

### Recency

When did this occur?

### Category Weight

How meaningful is this type of activity?



## LEVEL 2

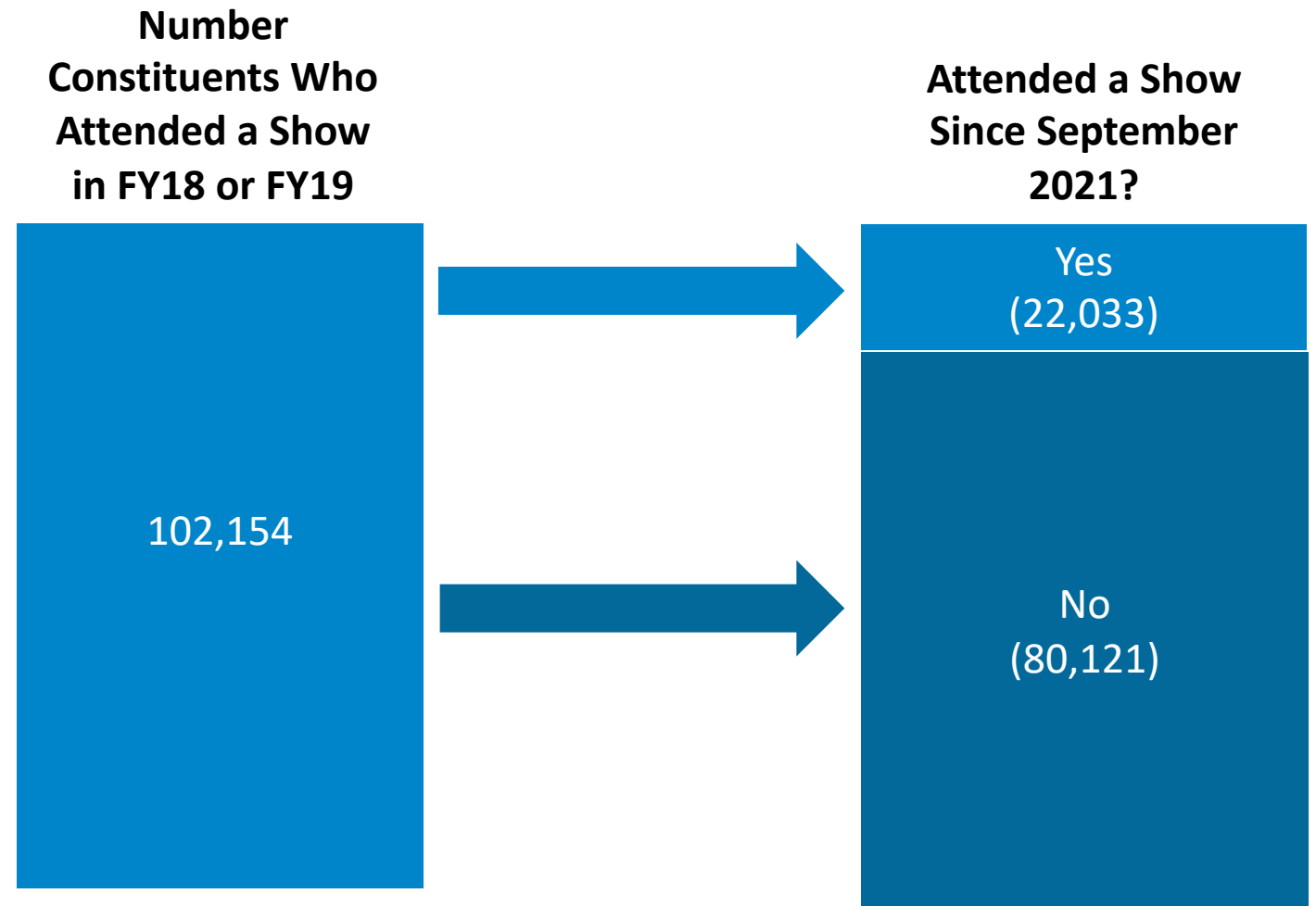
Weights particular modes of engagement to impact the overall score

Weight the activity based on:

	Impact	Recency	Category Weight
Example 1: 1:1 Site Visit with staff last week	3	3	40%
Example 2: Attended Gala 2 years ago	2	1	20%

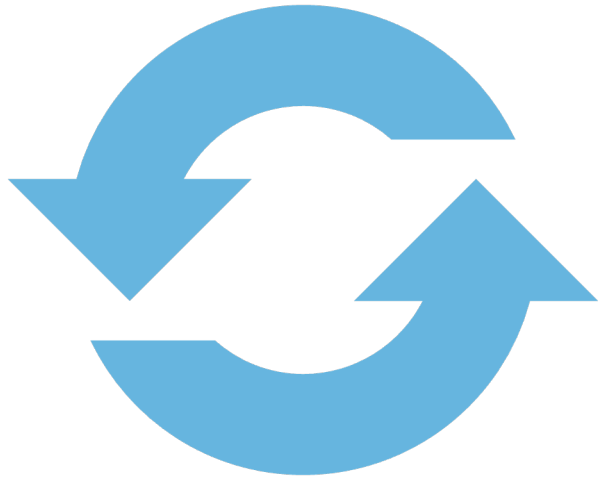
# LEVEL 2 SAMPLE

- Theater operations significantly impeded by the COVID-19 pandemic
  - In campaign, not able to get meetings with “likely” prospects
- ▼
- Assigned relative value of types of performances, events, activities, constituencies
  - Scored pre-COVID, during COVID, and post-COVID
  - Assigned highest weight to “Go” category
- ▼
- Attending mainstage production after COVID was high value

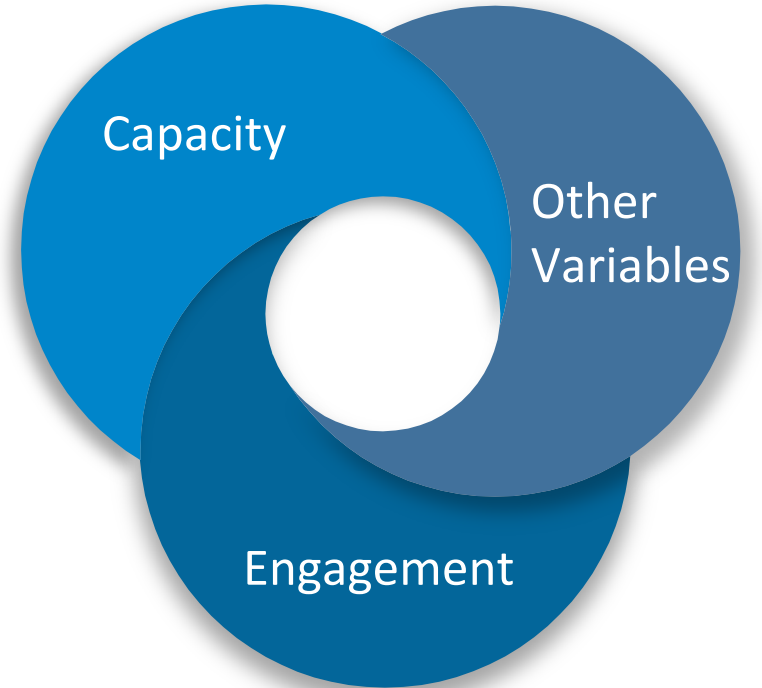


# LEVEL 3

Automated and Interactive



**Engagement score recalculates**



**Engagement score intersects with other data**

# LEVEL 3 Example

**FILTERS**

**Class Year**

1990 1995 2001 2003

1990 1992 1994 1996 1998 2000 2002 2003

**Degree**

Engineering, History, Statistics, Writing

**Prospect Status**

Future Prospect, Prospect

**Relationship Manager**

Anfernee Bird, Cheyene Thompson, Ezra Fish, Mikal Hol

**Best Wealth Indicator**

A. \$100K+, B. \$50K - \$100K, C. \$10K - \$50K

Apply Filters

[Engagement Summary](#) [Score Components](#) [Score History](#)

**Population Segment:** Relationship Manager

**Show:** Count  Show Table

Relationship Manager	Eng. Score	Low	Medium	High	Very High	Avg
Anfernee Bird	2110	959	40	461	Avg: 0.1	
Cheyene Thompson	2072	974	42	456	Avg: 0.2	
Ezra Fish	2071	981	37	472	Avg: 0.1	
Mikal Hobley	2122	955	35	486	Avg: 0.1	

Eng. Score ■ Low ■ Medium ■ High ■ Very High

# LEVEL 4

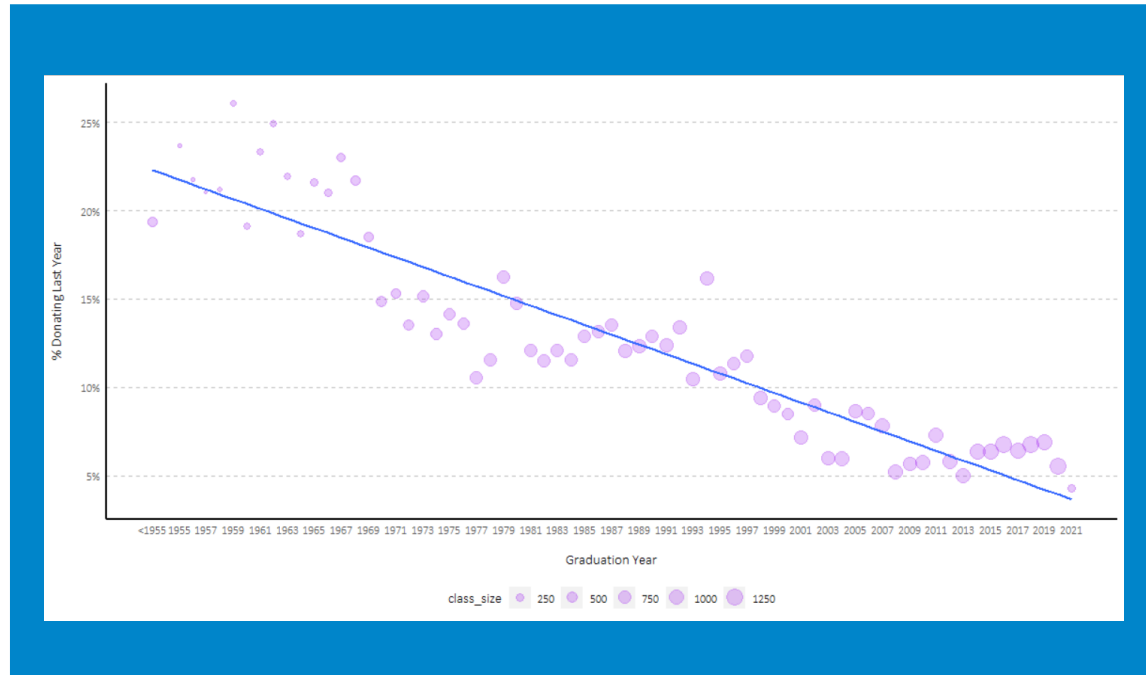
## Predictive and Prescriptive Analytics

- Level 4 goes beyond points-based model and instead is using predictive and prescriptive analytics to inform the model
- These models involve selecting a target variable as a measure of engagement
- It then uses predictive and prescriptive models to identify, not only how engaged constituents are but also the impact that various communications, events, volunteer and donor opportunities can have on that engagement



# LEVEL 4

## Example



Campbell was engaged by a private university to explore develop several models that explored engagement and predicted which alumni are most likely to engage (donate at any level) based on a set of characteristics.

We mapped everyone to a place on the engagement ladder and developed prescriptive tactics for moving a constituent from one rung of the ladder to the next

### Engagement Ladder



# Formulating Your Engagement Scoring Plan

Which level is right for our organization?

- What are the questions you are trying to answer?
- What data are you tracking?
- What skills do you have on your team?
- What does your CRM offer natively?
- Are you using BI and app tools already?
- What investment are you willing to make?
- Who will be the executive champion/advocate?



# Formulating Your Engagement Scoring Plan

What can I do with the score?

- Recommend better prospects for qualification
- Rebalance portfolios
- Inform engagement strategy
- Segment quality prospects at all levels of the gift table
- Encourage more comprehensive data tracking
- Celebrate and steward engage prospects
- Monitor trends





# THANK YOU!

Contact us via email in QR code



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