

The Many Uses of Capture Behavioral Engagement for Advancement



Identifying the RIGHT Alumni to Focus Gift Officers

In 30 days, CBE identified over 500 alumni visiting one partner's websites, registering for events, reading articles in their newsletters, researching athletics schedules or otherwise identifying their affinity to the institution. Over 60% of those identified had capacity scores at leadership or major giving levels. Gift officers now receive daily alerts of activity in their portfolio, and alerts for high-capacity alumni active in their territory that were previously unassigned.

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In total, CBE identified previously unassigned leadership and major gift prospects, active online, with a potential value of over \$1 million. Thanks to CBE, not only do we know who they are, but gift officers now have individual points of affinity to prioritize outreach with these active high-capacity prospects.

Planning for Planned Giving

Planned giving leads have been identified organically from monitoring the planned giving website for visitors who use the educational tools but do not reach out to the institution.

In addition, the majority of identified alumni graduated before 1985. Making the educated hypothesis that the alum enrolled at 18 years old, we can assume they are 50+ years old — ideal timing for initial estate planning. Knowing that a planned gift is generally the largest gift an alum will make, CBE can identify older alumni passionate about the institution at all capacity levels for further engagement. In addition to the previously mentioned high-capacity alumni, CBE identified the most active, older, mid-capacity alumni, allowing the partner to focus resources on engaging these prospects for planned gifts.

Leadership Giving

CBE delivers custom messaging based on individual interests and data points. Does the prospect meet leadership giving criteria? Your custom messaging focuses on the impact \$1,000/\$5,000/\$10,000 can make. Combined with daily alerts as alumni click through these messages, CBE notifies the team to prioritize outreach to these active, leadership capacity prospects who resonate with the cause.

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Messaging with Meaning – Who is Reading our Outreach?

Capture aggregated demographic data for these 500+ identified alumni to help the partner better understand who is engaged with their messaging and where opportunities exist. For the first time, the partner was able to see their messaging has tremendous engagement with older alumni — broken out by grad years. And, there is opportunity to develop messaging to younger alumni whose engagement is lower. The end goal: improve overall engagement to improve overall participation rates.

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A Month Before the Day of Giving

Use year-round monitoring with CBE to identify your most passionate alumni and empower them as ambassadors before your day of giving. Capture identified hundreds of active alumni for our partner’s upcoming day of giving. These alumni are being mobilized with materials, messaging, and other tools for peer-to-peer messaging. Dynamic content can also encourage alumni to share their “Why I Give” story for powerful marketing materials. The same technology can also direct web traffic on the big day.

Pack Your Bags with CBE

Gift officers are now planning their travel with capacity and affinity information for alumni across the country. The data is still coming, but knowing affinity levels and individual points made scheduling visits more efficient and likely will translate into fewer cancelations. **Stay tuned!**