

FIND OUT HOW CONCORDIA UNIVERSITY REVOLUTIONIZED ITS FUNDRAISING STRATEGY BY INCLUDING **A DIGITAL ENGAGEMENT PROGRAM AND A MULTI-CHANNEL APPROACH POWERED BY VANILLASOFT.**



Dubbed a next-gen university, Concordia strives to reinvent and reimagine the future of higher education. This public research university, situated on the traditional lands of the Kanien'kehá:ka Nation in Montreal, tops the list of North American institutions under 50 and boasts an innovative approach to experiential learning and cross-functional research. Concordia University's student body is diverse and consists of 51,500 young people who participate in different community engagement programs.

The school's Advancement Department is a team of roughly 80 people, including the Annual Giving, Development, Donor Engagement and Stewardship, Advancement Services, Advancement Communications, and Alumni Engagement teams. The Annual Giving team has six full-time staff members while also housing the Advancement Engagement Centre (AEC), comprising 30-35 student employees, which includes student ambassadors, shift leads, and digital engagement officers.

BACKGROUND AND CHALLENGES

Gillian Wise, Advancement Engagement Centre Manager at Concordia University, a Concordia grad herself, came to this position 1.5 years ago. Before taking over this role, she worked in different capacities at Concordia's Advancement Department in the Donor Engagement and Stewardship and Alumni Engagement teams.

When Gillian took charge of the AEC, it was predominantly focused on the traditional phone solicitation program. Although this old-school method was still reaching the most people and bringing in dollars, they noticed a decline in contact rates. Getting people on the phone and convincing them to donate became increasingly difficult. They concluded that this approach needed some tweaking and personalization.

The opportunity presented itself when their existing software ended its services in Quebec, forcing them to find a new solution in 2022.



HOW VANILLASOFT HELPED

With its robust and highly customizable suite of digital donor engagement tools, VanillaSoft seemed like a perfect partner to achieve a mint-on-the-pillow level of donor experience.


Next-Level Personalization

What drove them to VanillaSoft in the first place was

THE ABILITY TO AUTOMATE DIALING, TEXT, SEND EMAIL CAMPAIGNS, CREATE VIDEOS, AND SCHEDULE APPOINTMENTS.

They soon discovered the platform's full potential:

- It's cloud-based and integrates with a variety of tools and services, meaning they don't have to patch different solutions together.
- It allows for a personalized and intuitive approach, which lets them tailor communication and outreach based on their donors' preferences.
- It enables continuous and yet sustainable donor engagement that doesn't rely on full-time fundraisers.

 If you think about hotel loyalty and the things that they offer that are special to people who give back or who go to their hotels all the time, you get these little note cards when you arrive that say, "Thank you for booking with us again," or "We hope you enjoy your stay," and it says your name. There's this kind of expectation that if you're going back to the same place all the time, it's going to be a bit more personalized for you. With that in mind, it made us think about how we're treating our loyal donors who are giving at a certain level. How can we give a bit more attention to those individuals in a way that's still sustainable and not reliant on full-time fundraisers?

Opportunity to Innovate

When considering what donor engagement software to pick, they even briefly thought about scrapping the traditional Student Ambassador Program (SAP) entirely and switching solely to the Digital Engagement Program (DEP) approach.

However, to reduce the level of risk involved in a programmatic change, they decided to keep the SAP, knowing it would bring in their projected annual revenue and provide stability during the experimentation of the DEP. This decision made it possible to take the plunge into trying something.

With VanillaSoft, they could shake things up and launch both programs simultaneously. Students working in the DEP engage with leadership-level donors and book Zoom meetings with prospects.

Their objective is to

INCREASE ALUMNI INVOLVEMENT WITH THE UNIVERSITY, BETTER UNDERSTAND THEIR PHILANTHROPIC INTERESTS, AND ULTIMATELY ASK THEM TO RENEW THEIR ANNUAL GIFT.

Currently, there are two students in the Digital Engagement Officer (DEO) role, with the goal of expanding and growing the team.



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HOW VANILLASOFT HELPED (CONT.)

DEOs work during the day, while student ambassadors work during the night — all remote, which is another benefit VanillaSoft brings.



The fact that we are remote allows us to recruit more students. We have more people to choose from, not just ones who are centrally located. It's evening shifts, it makes it so that people who live farther out can come and work with us. We are in a big city, and not everybody lives downtown. It's very spread out, so it's hard to get to campus sometimes. If you have a shift that's 5 to 9 in the evening, and you need to make it home after 9 o'clock, and you have class the next morning, it's not really an attractive position when it's on campus.

Gillian credits VanillaSoft's cadence feature for the facilitation of the DEP, supporting the program's personalized "donor journeys." This strategy being new to them, the combination of the DEP and VanillaSoft's features allows them to be innovative and experimental while also focusing on the tried-and-true approach of the Student Ambassador Program. She underscores that for now, the SAP is still their primary source of income and the way they're reaching the most people. Besides being very interesting, the Digital Engagement Program shows tremendous potential.

Exceptional User Experience Enabled by Customer Success

VanillaSoft comes with endless customization possibilities, which is great for the end results. However, setting up and building personalized engagement campaigns can be challenging.

Gillian praises VanillaSoft's customer service and success representatives, WHO WERE MORE THAN WILLING TO GO ABOVE AND BEYOND TO HELP IMPLEMENT ANY IDEA THEY HAD.

The Student Ambassador Program is more prescriptive and consists of several simple-to-follow steps, so they prioritized implementing this program first and then worked on hammering out the details of a more complex Digital Engagement Program.



Danielle Manriquez (Customer Success Representative at VanillaSoft) was amazing, super knowledgeable, very responsive, and completely tailored to our needs. She was always available to support us and even is still when things come up and I have a question. In general, it felt like the sky was the limit. If we have an idea, we go and talk to Danielle or Emily Etzkorn (Fundraising Evangelist at VanillaSoft), and they're always, "Oh, yeah, we can do that."

Gillian was the primary admin that set up their VanillaSoft account, with her co-worker Andrew Mwachiro stepping in on the IT/tech side. So, there was no need to hire an additional person to set up and maintain the campaigns.



RESULTS

It's worth mentioning that Concordia started using VanillaSoft in September 2022 for the Student Ambassador Program and only launched the Digital Engagement Program in November of the same year. Despite this short timeframe, Gillian says the outcomes were better than they expected for both programs.

They had positive feedback from their two digital engagement officers, who managed to hit some impressive numbers over the period of only four months:

- > **THE AVERAGE NUMBER OF TOUCHPOINTS PER DEO: 2,479**
- > **THE AVERAGE NUMBER OF FACE-TO-FACE MEETINGS HELD PER DEO: 16**

Donors were also very enthusiastic about this kind of personalized outreach. They were pleased to hear from students in the DEO role and to attend meetings with them.


Similarly, the Student Ambassador Program greatly benefited from auto-dialing, considering that prior to VanillaSoft implementation, the students were required to manually dial phone numbers. In addition to this boost in productivity and efficiency, Gillian also values the ability to monitor calls from the HUD, especially since all students are working remotely. Shift leads can listen to calls, too, meaning they are able to take detailed notes and give feedback to student ambassadors to coach and help them improve their performance.

WHAT'S NEXT?

There are no hard-set goals, given that it's the first year for both programs at Concordia's Advancement Engagement Centre.

As for the Digital Engagement Program, the broad objectives are to engage alumni, book meetings, and build a pipeline of prospects for their leadership and major gift fundraisers. They also plan to expand the program and promote high-performing students from the SAP to DEO roles. Another essential objective is to research how other schools are developing their programs and adjust their strategies based on these findings. Finally, since it's a pilot program, Gillian says they want to determine what metrics to track and how to define success.

The same applies to the Student Ambassador Program, which is more traditional and aims to solicit gifts and contact prospects. Even so, it will take another year to accurately forecast what can be accomplished in the two programs with VanillaSoft. This year has been a year of learning.

 We're looking at expanding the Digital Engagement Program team to have more Digital Engagement Officers in that role to build that out a bit more. I'd like to streamline some of the result codes and custom fields in our Student Ambassador Program. I'm doing a lot of research as to how other institutions are developing their programs and what their objectives are. I really need to define what success looks like in these separate programs and how we can accomplish these objectives.

