

LEARN HOW THE UNIVERSITY OF SOUTH FLORIDA TRANSFORMED THEIR FUNDRAISING EFFORTS AND ACHIEVED A DONATION BOOST PROPELLED BY VANILLASOFT'S INTELLECTIVE ROUTING AND CADENCES

Find out how VanillaSoft's Intellectual Routing and Cadences proved to be a game changer for the University of South Florida's brand-new Digital Engagement Center fundraising strategy



The University of South Florida is a young but prestigious public research university in the Tampa Bay region of Florida, with three campuses and more than 50,000 students. It offers a wide range of academic programs and degrees, from business and engineering to the arts and health sciences. USF is recognized as one of the top 50 public universities in the nation by U.S. News & World Report (U.S. News) and as a Preeminent State Research University by the Florida Board of Governors. USF is also the first public university in Florida invited to join the Association of American Universities in over 40 years. A leader in innovation, entrepreneurship, and social impact, in 2022, the school, whose staff, alumni, and students collectively hold nearly 3,000 patents, was awarded over \$500 million in annual research expenditures.

Background and Challenges

When Allyson Townsend, Associate Director of Development, joined USF's Advancement team seven years ago, the school had already discontinued its phonathon program, with Annual Giving focusing on direct marketing strategies and mass texting campaigns.

When Jay Stroman, CEO of the USF Foundation, joined the university in 2020, he recognized a need to relaunch the phone program but with a modern twist. Given that he had already helped launch a Digital Engagement Center for the University of Georgia, he had ideas for reimagining their entire fundraising concept. This included reaching out to alumni in ways they hadn't been contacted in years, diversifying outreach platforms, and using a multichannel approach that incorporated phone calls.

Allyson's supervisor Kelley Gibson, Senior Associate Vice President of Development, also had experience with phonathons and was on board with the idea, so together with Andres Benavides, Assistant Director of Development for USF's Digital Engagement Center, who joined the team in fall 2022, they started building the Center from the ground up.

With this new program, they wanted to eliminate generic outreach and personalize their communication with constituents as much as possible.

HOW VANILLASOFT HELPED

Flexibility and the ability to customize the platform

The USF Advancement team opted for VanillaSoft because of its flexibility and scalability.

They liked that it is customizable in terms of setup, as it fit their needs at the time,
**BUT ALSO ALLOWED THEM TO RE-CONFIGURE THE PROGRAM OR BUILD A NEW ONE
IN CASE THEIR FUTURE NEEDS AND GOALS CHANGED.**

VanillaSoft not only helped them grow their program but could also grow with it.

“ Choosing VanillaSoft was the best decision we could have made for our Digital Engagement Center. It really allowed us to build whatever strategy we came up with. In other circumstances, with other vendors, you don't have the flexibility to customize the strategy, make it your own, and make it work for your goals.

ALLYSON TOWNSEND, ASSOCIATE DIRECTOR OF DEVELOPMENT AT USF



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HOW VANILLASOFT HELPED (CONT.)

Powerful customization options

Andres says that one of the biggest selling points of VanillaSoft is that it gave them an opportunity to introduce numerous different touchpoints with constituents and personalize each one of them. Both Andres and Allyson highlight the following features as being instrumental in achieving a granular level of personalization:

- Having automated cadences allowed them to achieve much more without compromising the quality of outreach. They were able to make sure their constituents were getting a few extra touchpoints. With VanillaSoft, adding a new step from text messages to email was easy, while dynamic scripting provided fundraisers with more natural talking points.
- Intellective routing filters enabled them to personalize constituent touchpoints down to a tee. This intelligent queue-based feature constantly evaluates constituents, factoring in new parameters and their preferences, and prioritizes them accordingly. As a result, fundraisers could reach the next-best donor at the right moment and have relevant conversations with them.

“Intellective Routing [filters] allows us to really personalize our outreach. For example, we are able to segment our constituent list to details such as “former football players from the 2018 team.” We can get down to that nitty-gritty ourselves, in real time, whereas in other softwares I’ve worked with, in order to get down to this level of detail, you have to put in a request, and then you wait. Maybe it’ll come back in two weeks to a month.

ANDRES BENAVIDES, ASSISTANT DIRECTOR OF DEVELOPMENT FOR USF’S DIGITAL ENGAGEMENT CENTER

Seamless onboarding

Allyson praises the ease of implementation and emphasizes that it was pretty straightforward.

This was particularly important because they were launching a brand-new program,
AND SMOOTH ONBOARDING TOOK THE STRESS AWAY FROM THE PROCESS.

“There really wasn’t a lot that I can think of implementation-wise for the buildout that went wrong, or that was difficult. I feel like it was pretty straightforward, and once you dip your toes in and then dive deep, it really just becomes easier. The more you’re in there, the easier it gets. I think it’s a huge testament to VanillaSoft, in my opinion, that there weren’t any major hiccups within those first few weeks. It was just all the little things that we had the power to quickly change on our end.

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HOW VANILLASOFT HELPED (CONT.)

Top-notch customer service

In addition to starting a DEC program, the USF advancement team was also in the process of building a physical space for the team, so the stakes were high, and they needed all the help they could get. Andres points out that the support they received from VanillaSoft's customer success representatives in implementing and getting started made all the difference.

What particularly impressed him was

HOW RESPONSIVE THEIR DEDICATED CUSTOMER SUCCESS REPRESENTATIVE WAS AND HOW THE ENTIRE TEAM WAS QUICK TO ANSWER ANY QUESTION, SEND A WALKTHROUGH VIDEO, OR HELP WITH SETTING UP THE PLATFORM.

“ You have your customer service down pat. When we were implementing things, Maria said, “If you need something, just throw ‘urgent’ in the subject line, I’ll get back within seconds.” We used it a few times, and within seconds, there was a video response or an easy walkthrough. I think what really helped our implementation go so well is that almost immediately, the VanillaSoft team, if it was an urgent matter, were either on the phone with us, had a meeting set up, or had a response.

ANDRES BENAVIDES, ASSISTANT DIRECTOR OF DEVELOPMENT FOR USF'S DIGITAL ENGAGEMENT CENTER

Improved donor experience

Many fundraising programs struggle to prove their credibility over the phone and get donors to give their credit card information. The USF Advancement team had the same problem, as donors were not comfortable sharing sensitive information. A page was created on the USF website with the student caller headshots. Students could send a text with a link through VanillaSoft during the call so that donors could see they were talking to a real person from USF. This exchange during the phone call allowed donors to fill out the credit card information while the student was still on the other end talking to them.

This tactic significantly improved donor experience

BY ELIMINATING TRUST ISSUES AND ADDING A LAYER OF CREDIBILITY TO CONVERSATIONS.

“ There were many situations where a donation might have become a pledge because people don't want to give their credit card numbers over the phone. But since we have the ability to send a text with a link through VanillaSoft, people are able to fill out the credit card information while the student is still on the phone with them, and increase the likelihood of a donation. They're able to continue that conversation and continue talking with the student. It's a win-win situation.

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RESULTS

The USF Digital Engagement Center was launched in January 2023, and during their first semester, they had no strict goals other than to get the program up and running. There were discussions with leadership about the program's "nice-to-sees," and that was mainly focused on donor count as a priority. However, everyone understood that with the first-time launch, this was hard to predict, and they were aware that numbers would change over time.

Besides quantifiable goals, leadership wanted students to be comfortable in their roles. In a nutshell, the idea was for the entire team to learn, keep the program going, raise some money, and have fun in the process.

Andres states that his personal goal was to reach \$250,000 during the semester and onboard 80 students before the spring semester, and they managed to hit both, even exceeding the self-set fundraising goal.

The bottom line is that during its first semester of operations, the USF Digital Engagement Center:

- **Surpassed \$250,000 raised**
- **Acquired 500 new donors**
- **Exceeded their pre-pandemic credit card rate goal of 30%**

“ I felt we had to make \$250,000 in our initial semester of operations, and we did. We were overjoyed at midnight when putting the numbers together for our leadership team. And you know, we did so with a high credit card rate, higher than years past. Our credit card rate is higher now than before the pandemic when our goal was 30% or above.

ANDRES BENAVIDES, ASSISTANT DIRECTOR OF DEVELOPMENT FOR USF'S DIGITAL ENGAGEMENT CENTER

WHAT'S NEXT?

Such tremendous growth was spurred in part by the power of workflow automation. VanillaSoft's level of customization and flexibility for optimizing donor touchpoints freed up staff time and allowed them to focus their attention on other things. Thanks to all this, they decided to work toward launching a Digital Engagement Officer program in the fall of 2023 or early in the spring of 2024.

“ It would require a lot more work on our part to make sure constituents are getting extra touchpoints if we did it manually, so having automated cadences freed up so much time that we could focus on other things. We were discussing the potential Digital Engagement Officer program here, hopefully coming this fall or early next spring [2024].

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