

Speaker Information

- **Anne Ibach**
Director of Membership
503.293.1937 ~ aibach@opb.org
- **Rachael Snow**
- Associate Director of Membership Operations
503.293.4006 ~ rsnow@opb.org











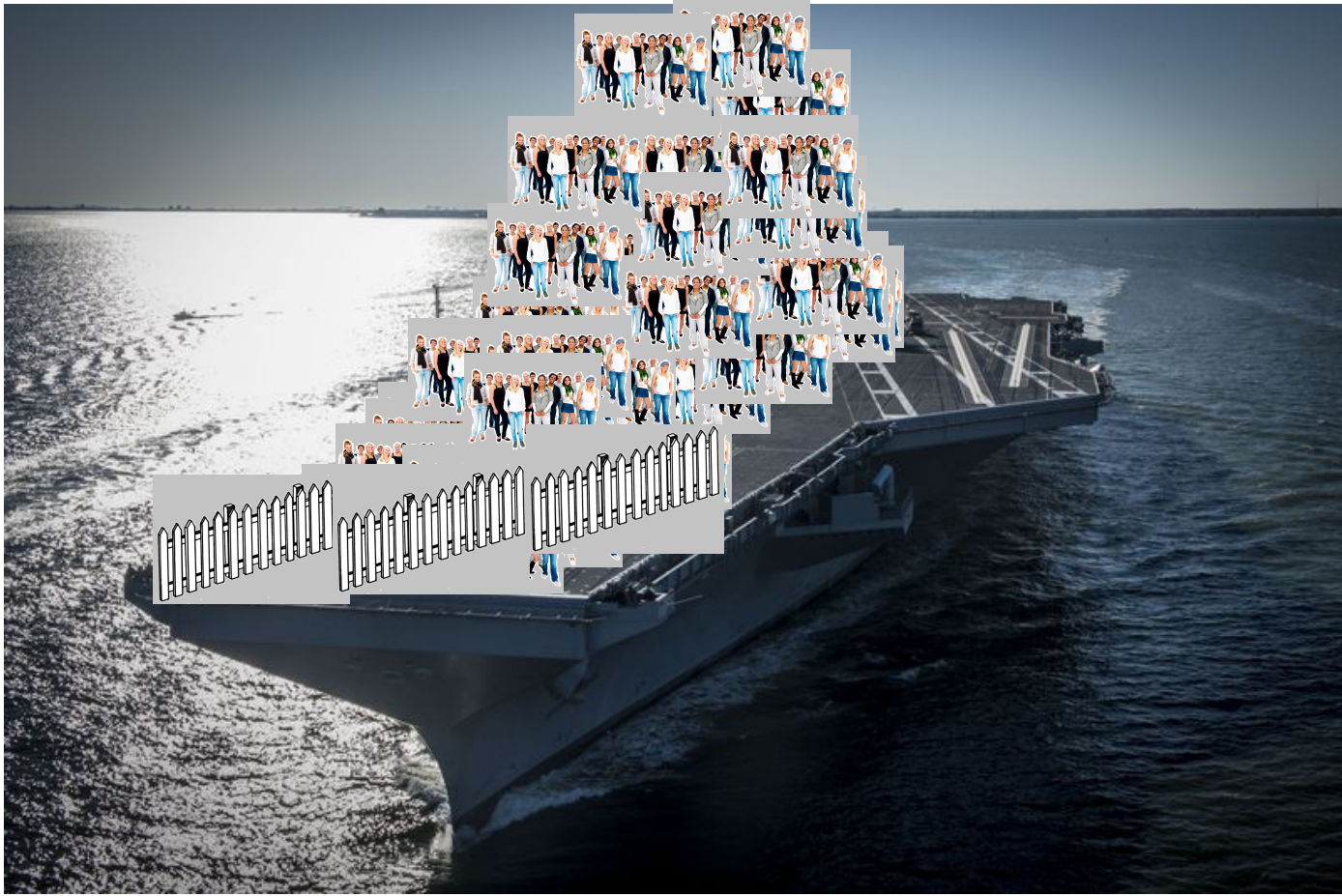


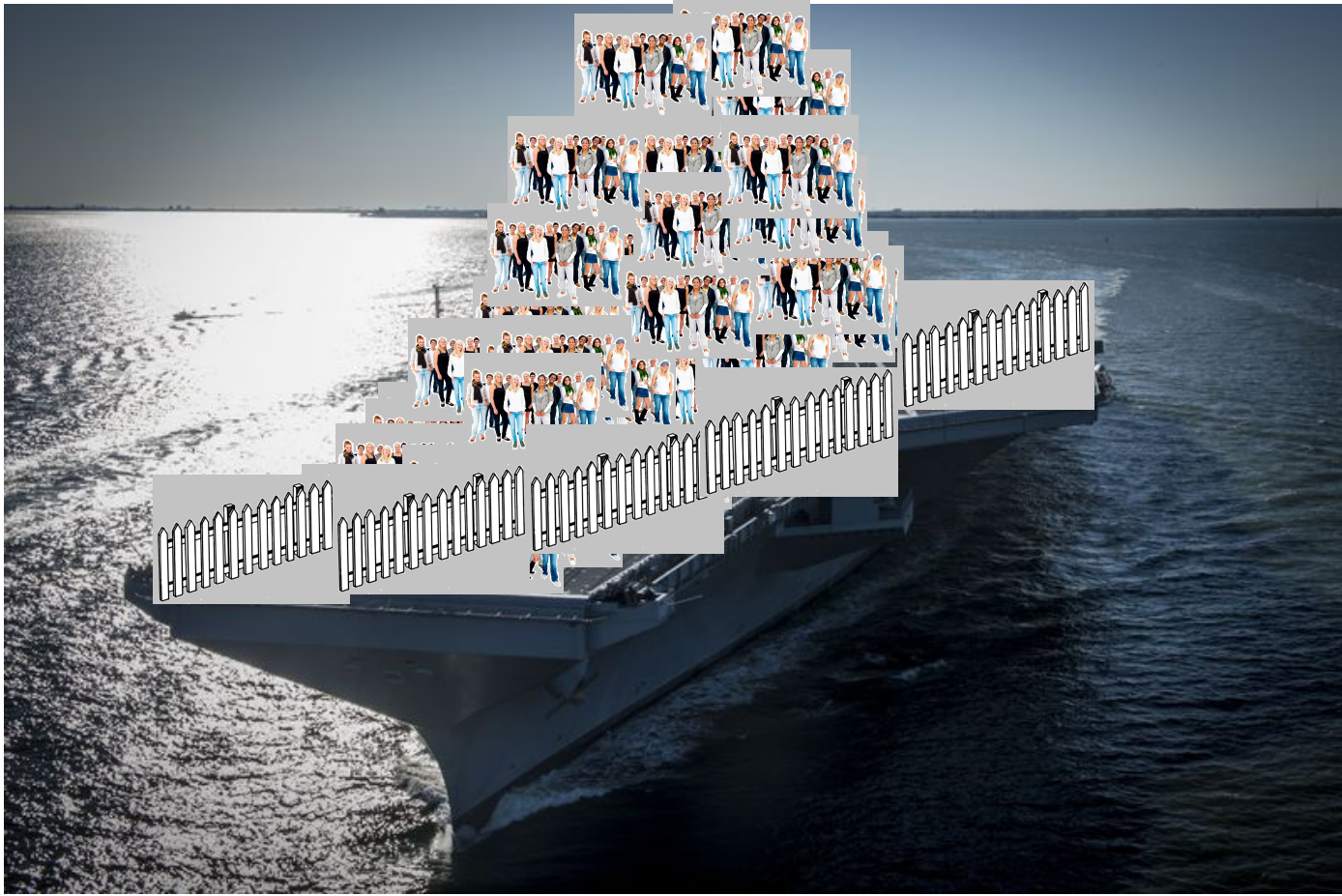


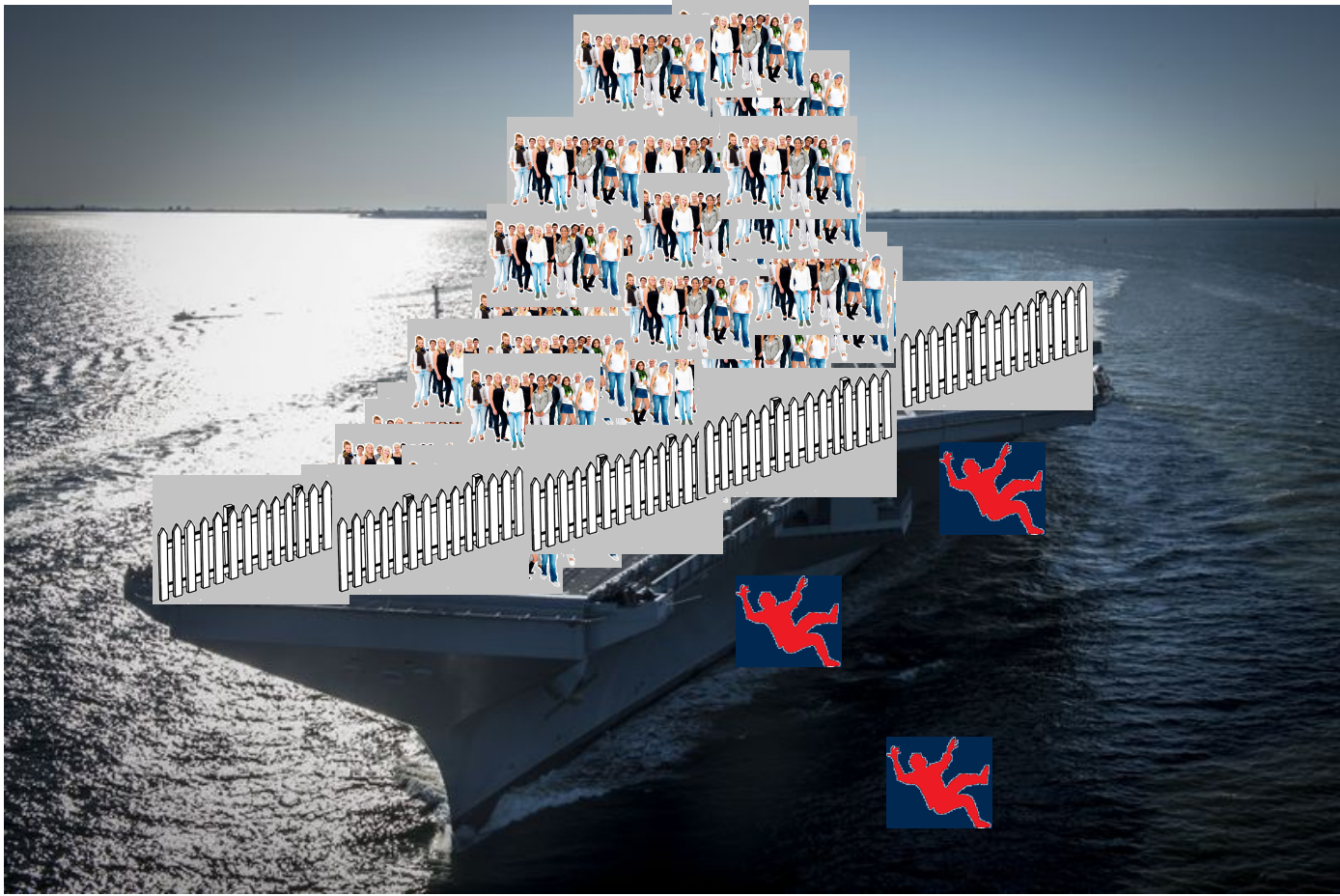




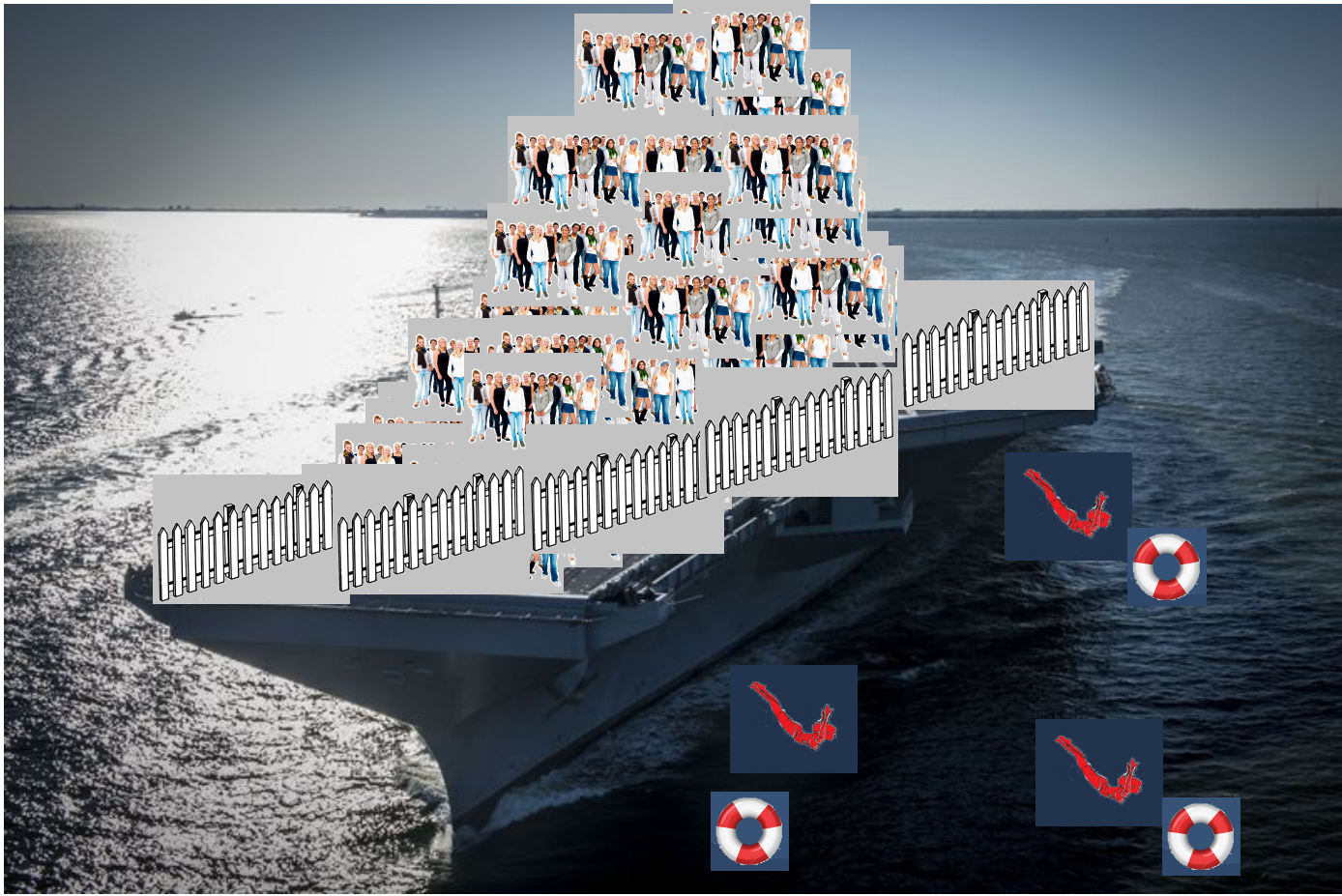






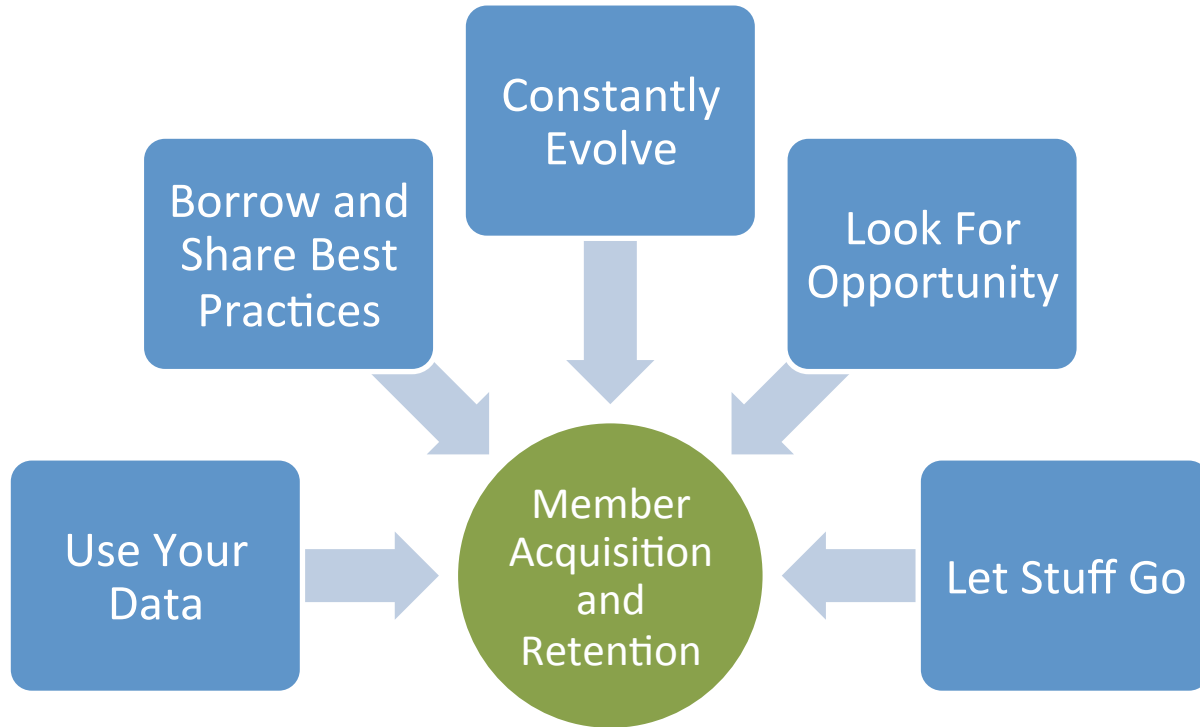








The OPB Strategy

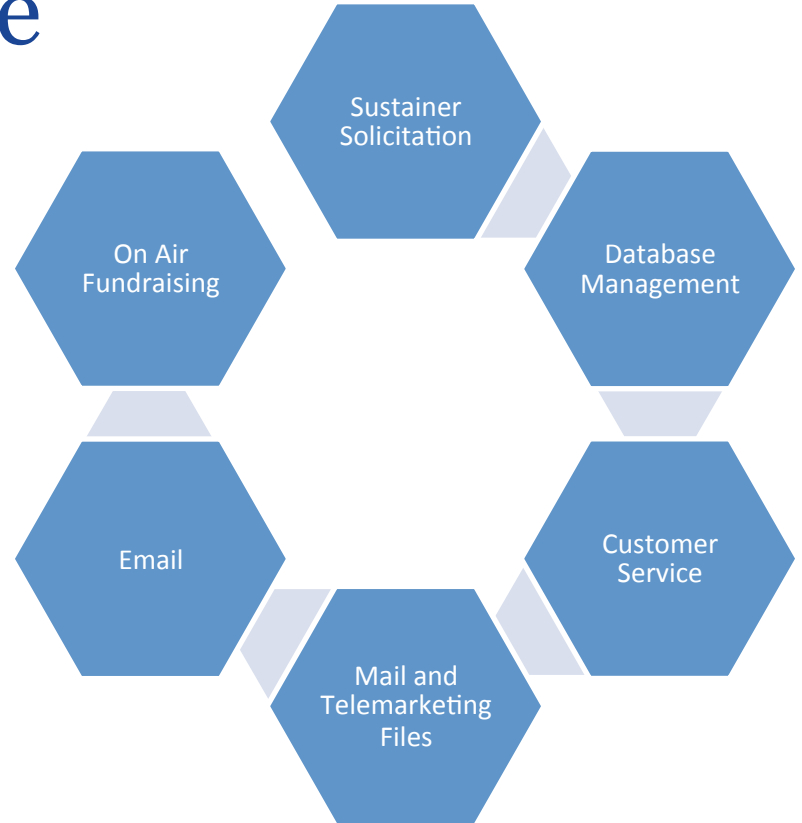


What changed?



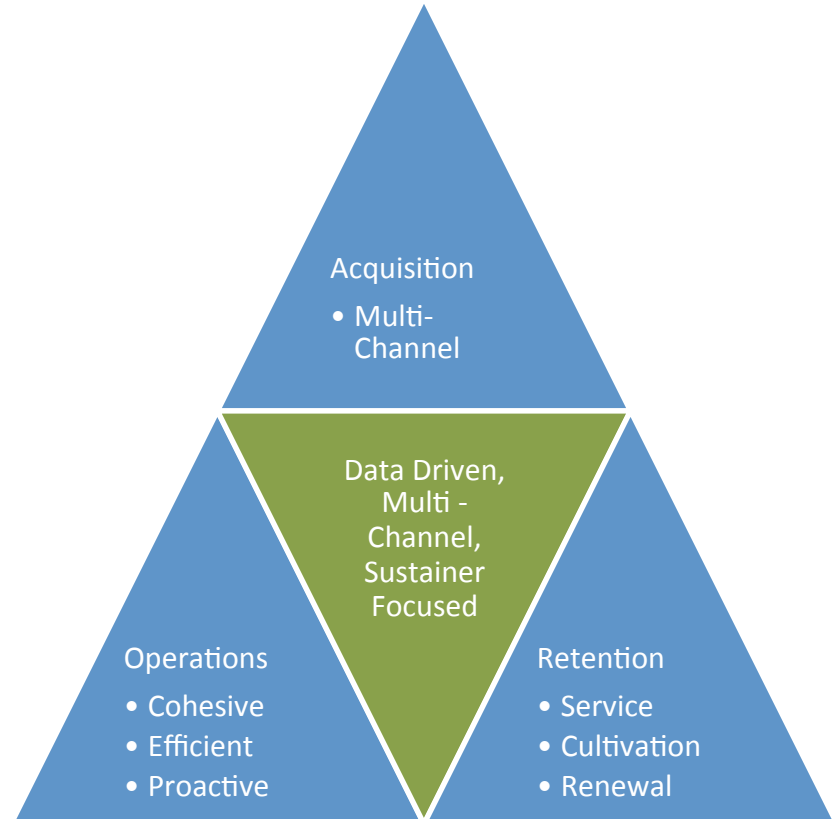
The OPB Team Before

- Jobs were channel and task focused
- Strategy was not data driven
- Member experience was disjointed



The OPB Team After

- Jobs are focused on strategy rather than channel or task
- Everyone is responsible for sustainer acquisition and conversion
- Everyone works with data



Focus on Acquisition and Retention

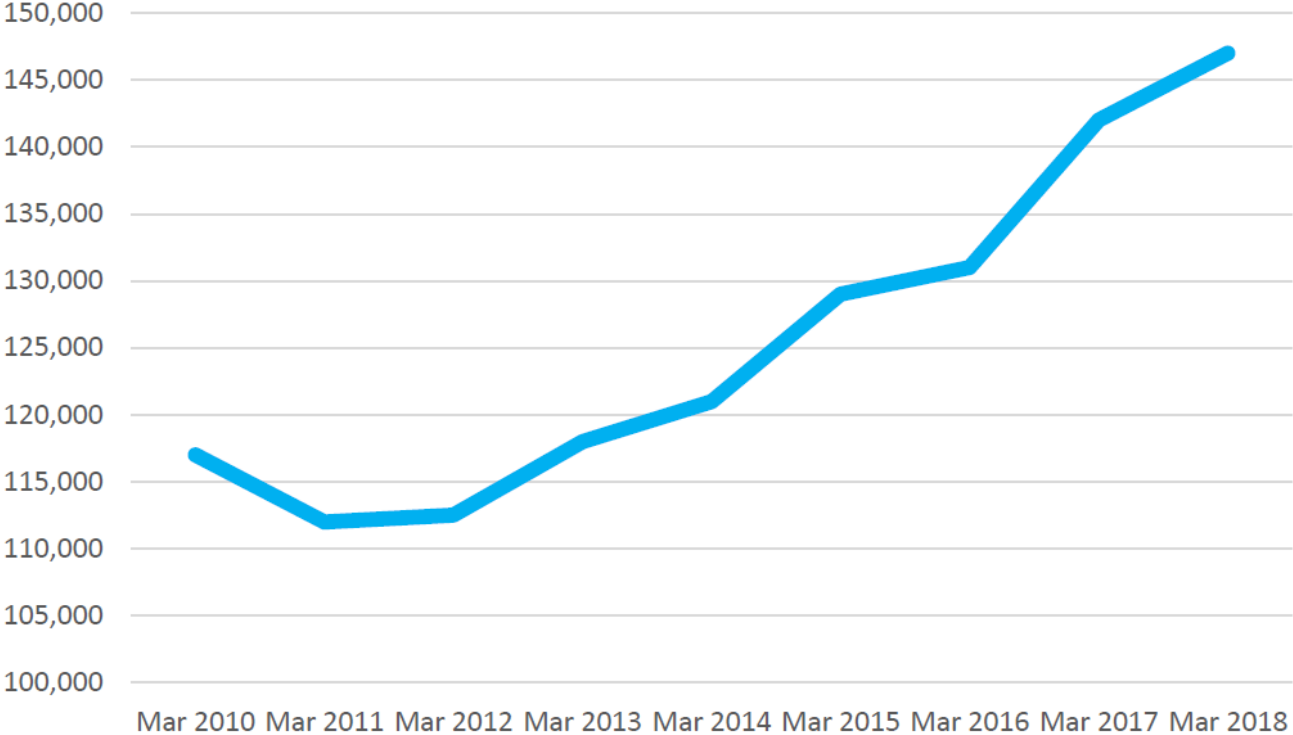
Acquisition

- Focus on sustainers
- Make it cross channel
- Use your air wisely
- Test and retest

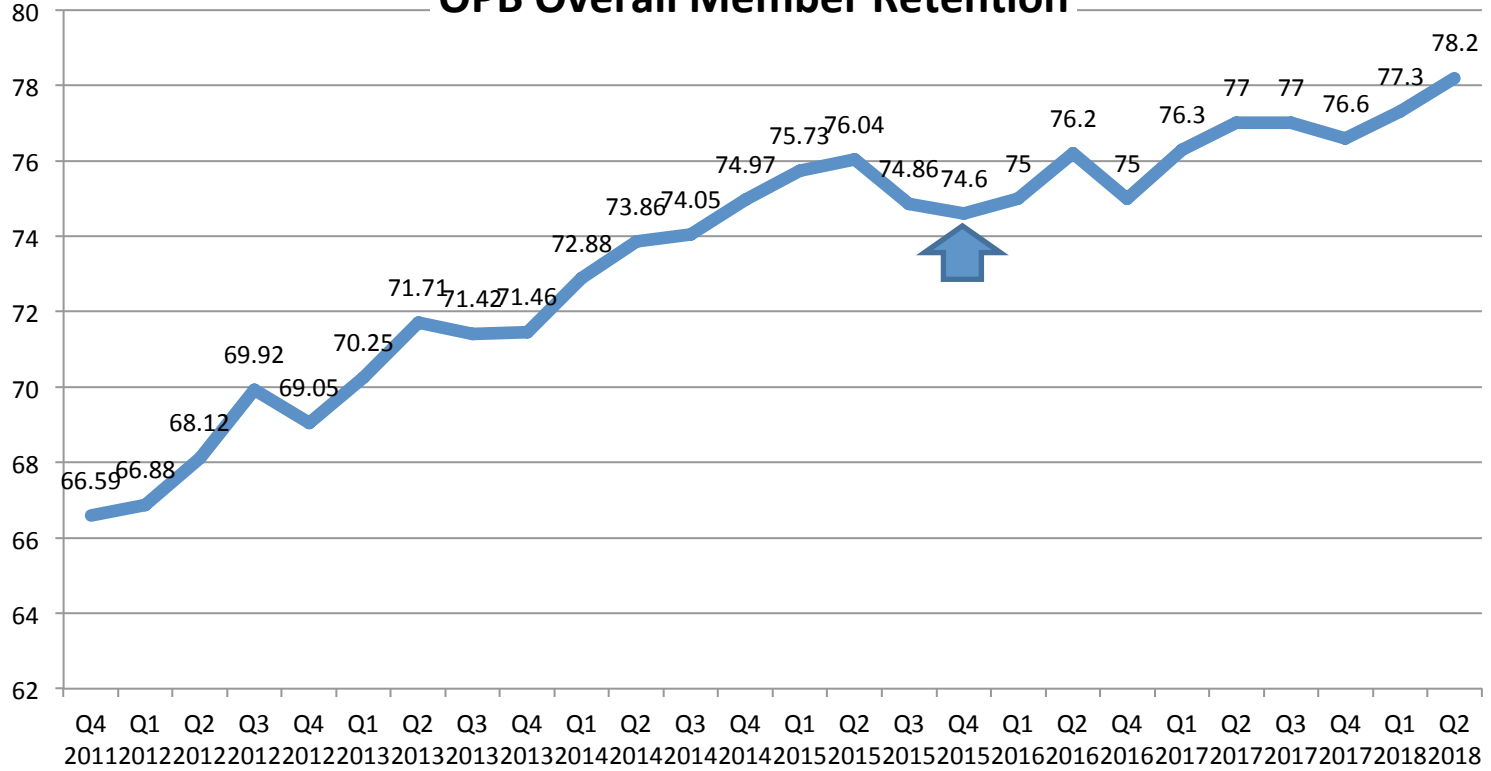
Retention

- Provide great service
- Clean up operations
- Automate and streamline
- Communicate proactively

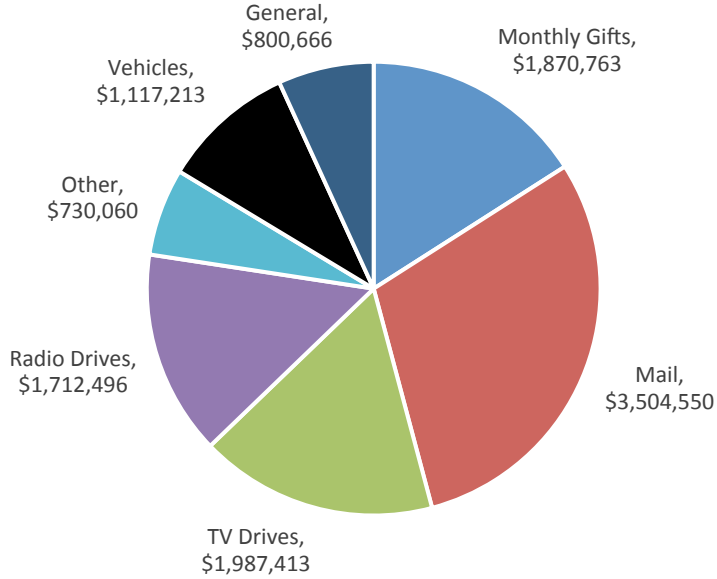
OPB Member Counts



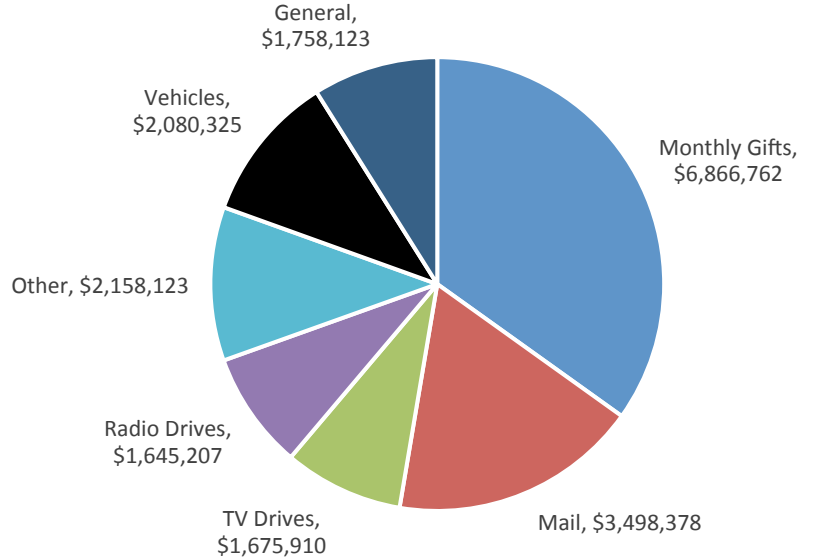
OPB Overall Member Retention



FY 2012 Revenue -- \$11,723,161



FY 2018 Revenue - \$19,682,828

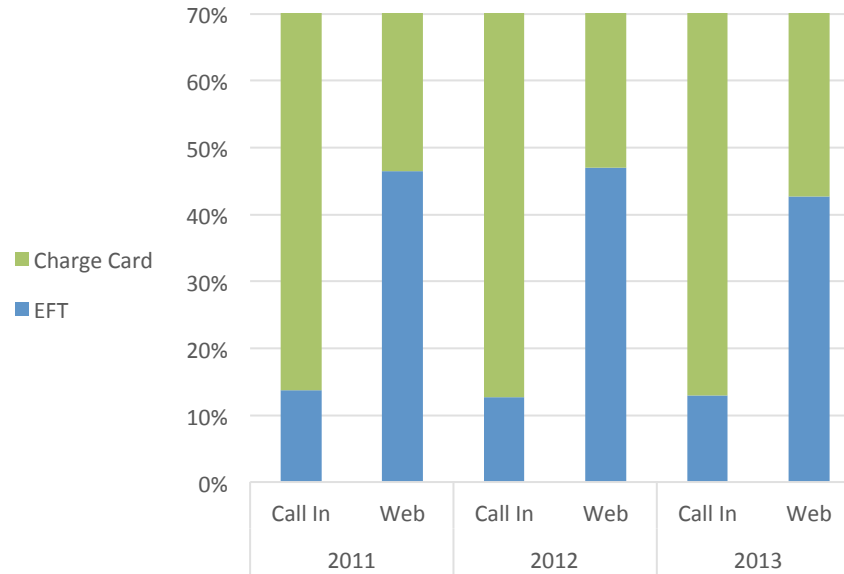


Case Studies

- Call Center as an Acquisition and Retention Partner
- You Manage on What you Measure
- Customer Service is Retention

Call Center as a Fundraising Partner

% of Susters on EFT Web vs. Call In



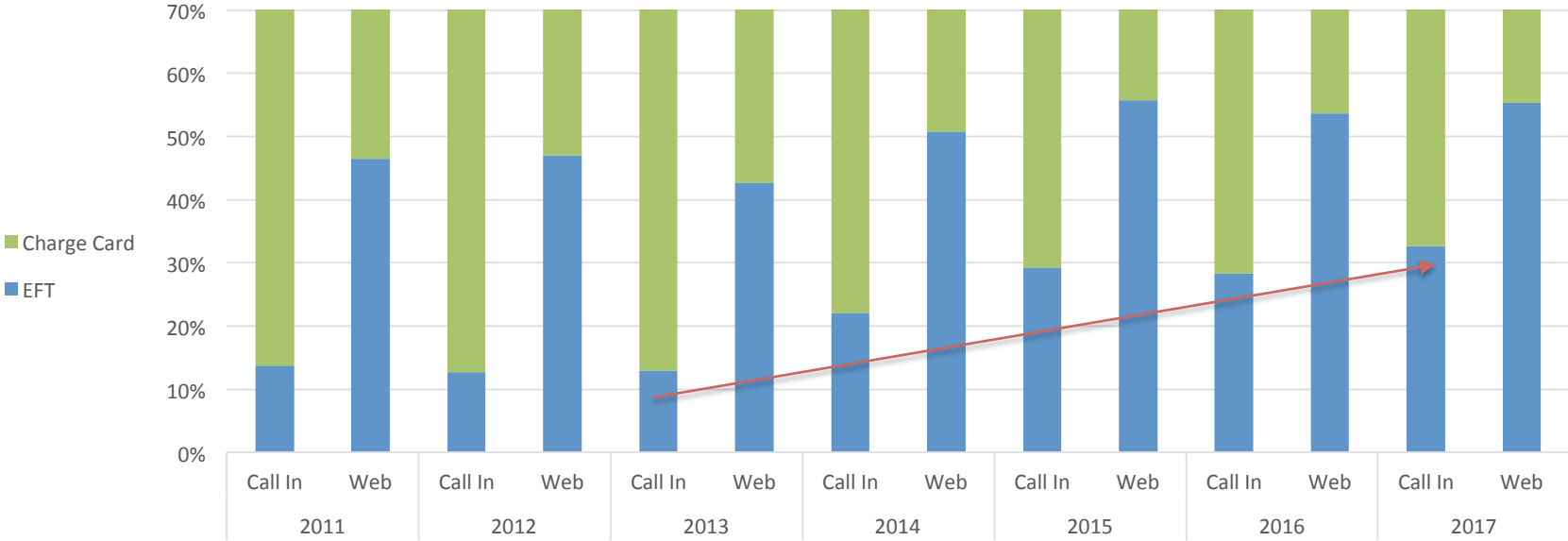
The percentage of members making their sustaining gift using their checking account was much lower over the phone than online.

Call Center as a Fundraising Partner

- Rewrote in-bound scripts to ask for EFT and sustainers
- Retrained on-site volunteers on the mechanics of taking a call and the importance of sustaining membership
- Implemented a member lookup allowing the caller to increase their monthly gift or update their payment method

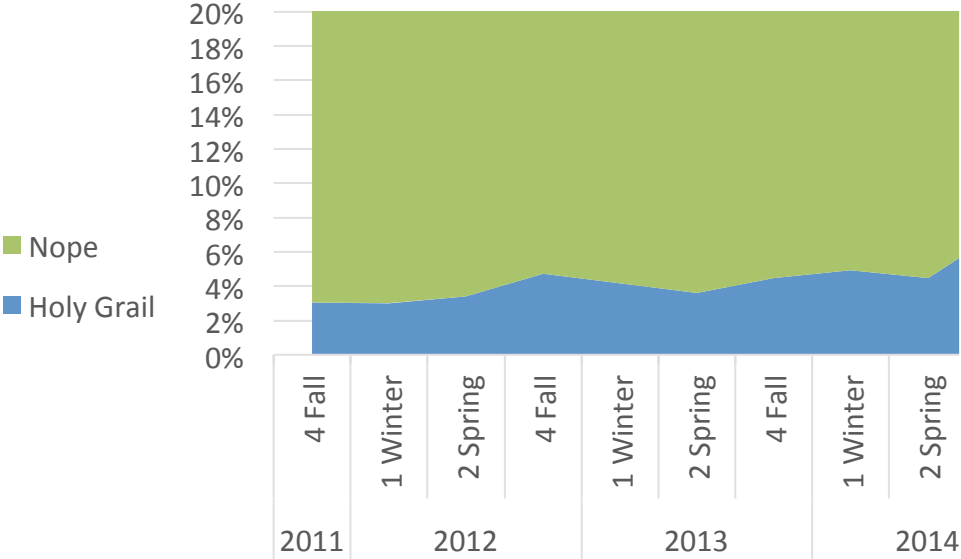
Call Center as a Fundraising Partner

% of Susters on EFT Web vs. Call In



The Search for the Holy Grail

% of New Sustainers on EFT by Radio Drive



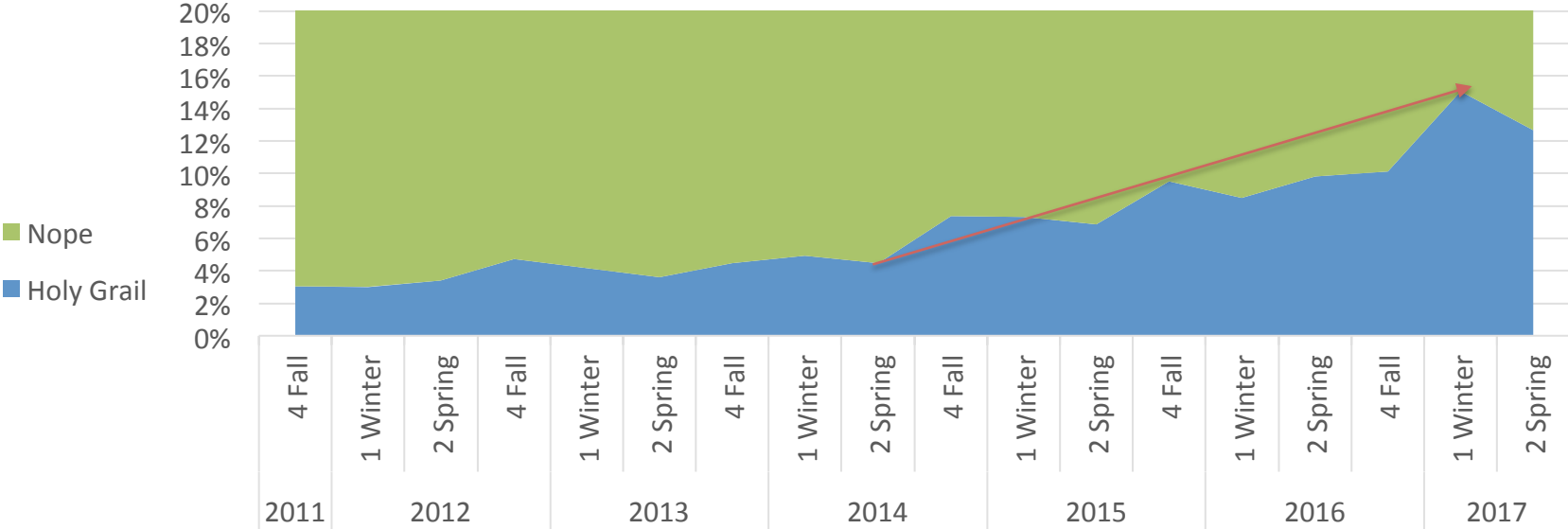
On air drives are the most effective way to get new, sustaining donors. The rate of new sustainer acquisition during drives was stagnant.

The Search for the Holy Grail

- Revised on-air messaging to focus on new sustaining members and explain the value of using a checking account
- Shared metrics across organization creating a shared interest in increasing performance
- Updated online giving forms and inbound calling scripts to encourage monthly giving using a checking account

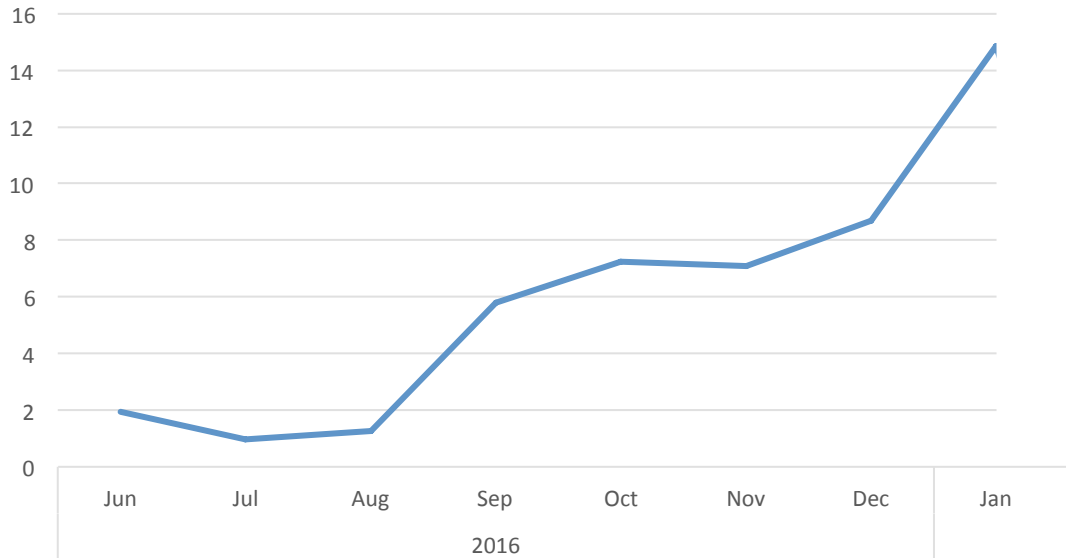
The Search for the Holy Grail

% of New Sustainers on EFT by Radio Drive



Customer Service is Member Retention

Average Time to First Customer Service Response



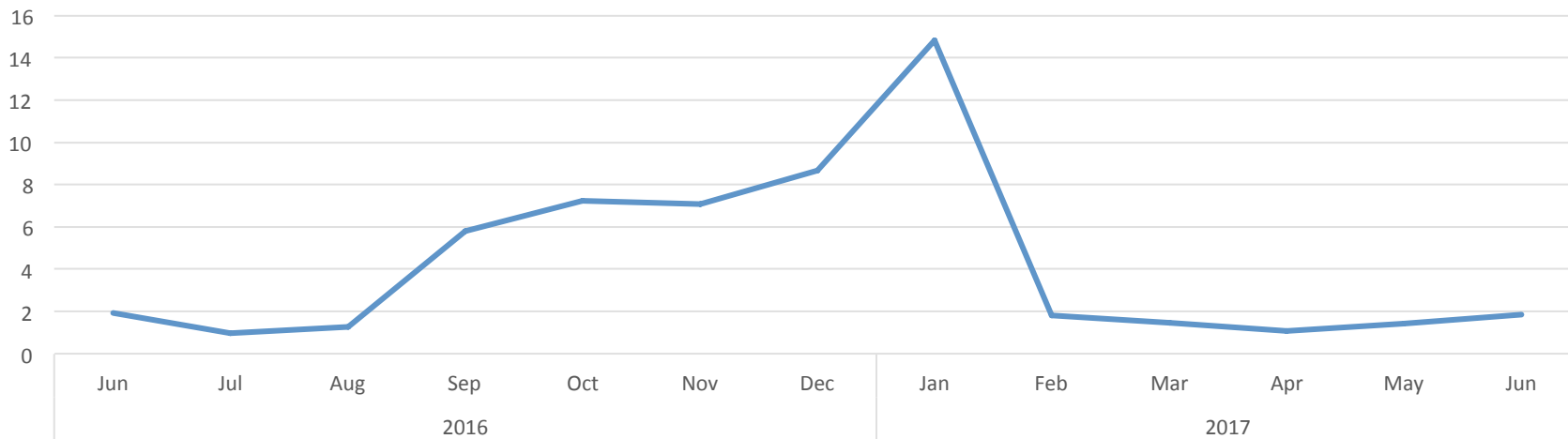
As case volume and complexity increased our member center was no longer able to keep up with the caseload resulting in a poor member experience.

Customer Service is Member Retention

- Increased visibility across organization to key metrics
- Outsourced some sustainer customer service
- Got rid of voicemail to improve experience
- Added an additional FTE to improve service level
- Improved customer service scripts and resources
- Trained team on member acquisition and upgrades

Customer Service is Member Retention

Average Time to First Customer Service Response



Questions?

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