



Transforming Connection, Community & Impact
NAYDO 2020 Virtual Session

We are Better Together!

August 27, 2020





Forward-Looking Statement

Statement under the Private Securities Litigation Reform Act of 1995

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Meet the team



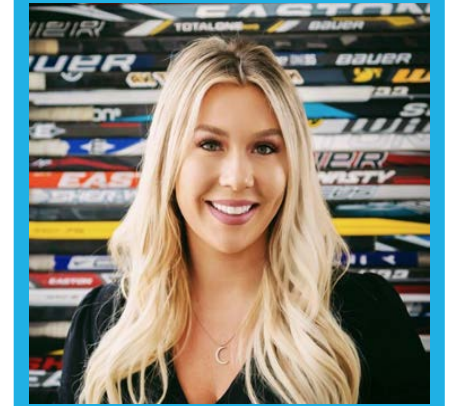
Justin Schumer
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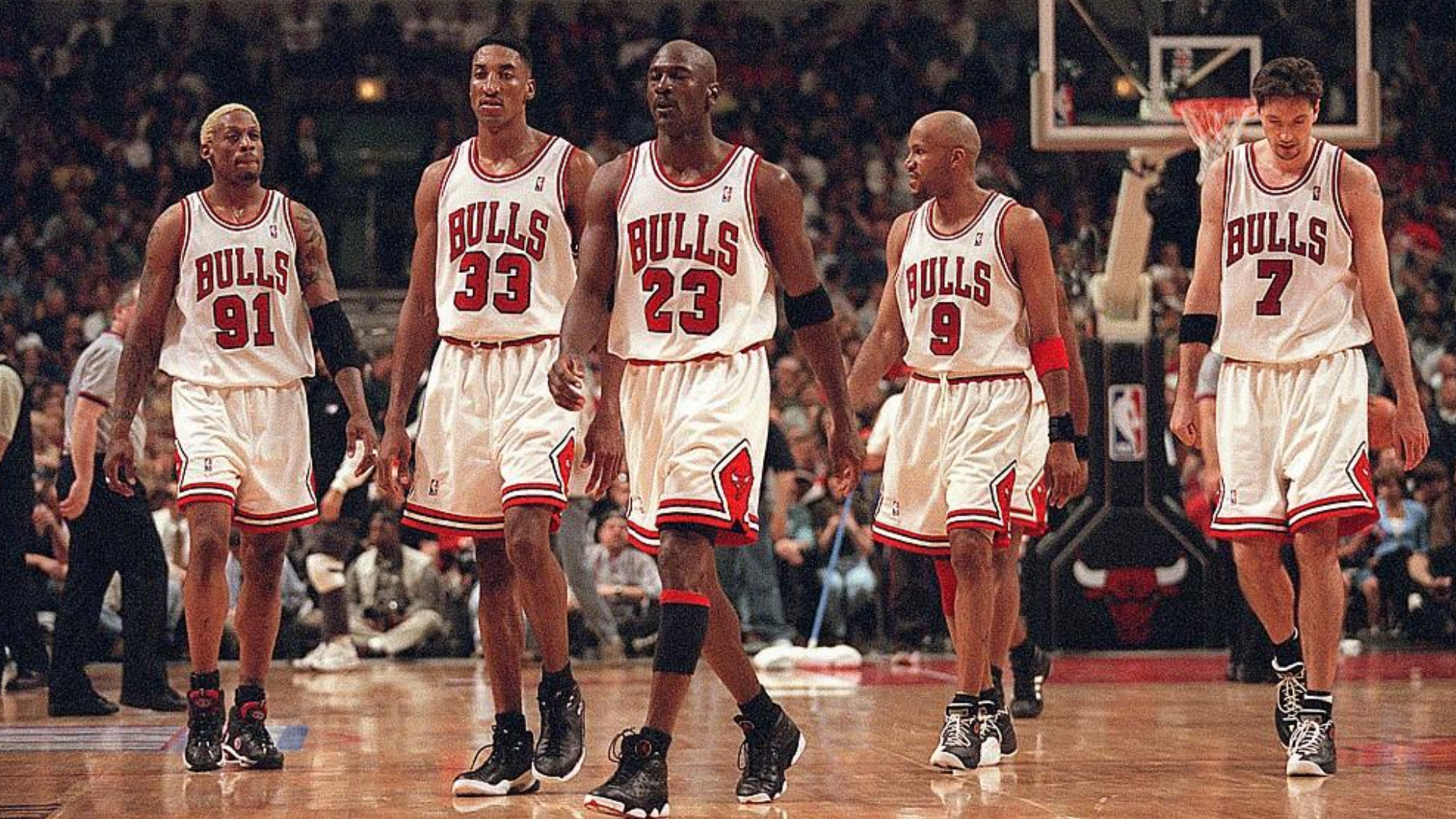


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darrick.chan@salesforce.com



Stephanie Andersen
Traction Rec
Account Executive
sandersen@tractionrec.com











You're being asked to increase donations by...



HOW DO YOU ACHIEVE THIS?

A Connected YMCA

To help amplify the Y impact on members' lives, empower employees, and transform into a more efficient, strategic organization

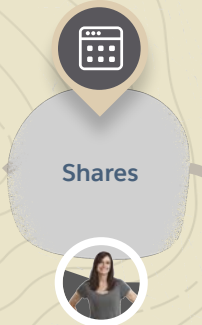
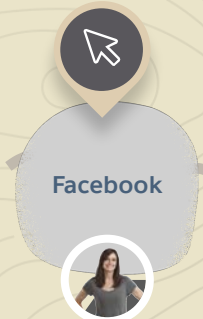
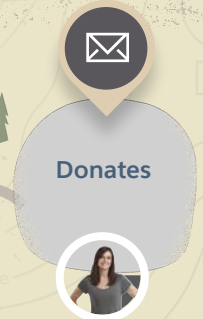
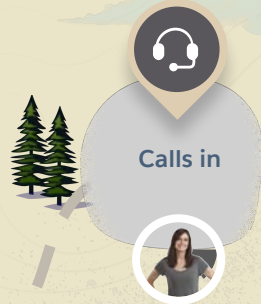




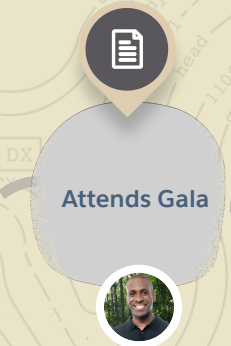
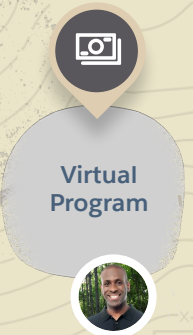




John & Rachel
Engage w/ the Y



Member/Donor



Major Donor



Meet Rachel



45 years old; married with 2 children;
works full-time as a nurse



Family membership- 8 years



Comes in 2/week



Mission-Driven Donor

Because of what you now know about your members
guest services & your call center can make them feel
pretty darn special



Greets with a personalized call.

"I see you're enrolled w/ Family Membership. Let me tell you about some of the community programs we're providing."

Lightning Service ... Contacts Lauren Bailey 00002430 Call Log

Case Details

Case Number: 00002430

Contact Name: Lauren Bailey

Status: New

Product Family: []

Priority: []

Case Billing Questions

+ Follow Start Conversation

Feed Related **Details**

Subject: Billing Questions

Description: []

Case Information

Case Number	00002430	Case Owner	Tier1Queue
Branch Location	Downtown YMCA	Asset	Starter Kit
Case Origin	Phone	Contact Name	Lauren Bailey
Status	New	Account Name	Ohana, Inc.
Type	[]		
Priority	Medium		
Channel	[]		

Entitlement Information

Case Tools

More

Knowledge

Search Knowledge

Suggested Articles

9 Results · Sorted by Relevance

[Frequently asked questions...](#)

000001244 · Last Jul 7, 2020, 1:35 PM

Published PM

Answers to common questions about billing issues

[How do I return an item?](#)

000001262 · Last Jul 7, 2020, 1:35 PM

Published PM


Step-by-step instructions for returning an item to the company

[What kinds of activities qu...](#)

000001246 · Last Jul 7, 2020, 1:35 PM

Published PM


Open CTI Softphone: Available



Rachel Morris

Incoming (415) 715-7447...
0:04

Decline Accept





- Engagement
- Membership
- Call Center
- Development
- Community
- Collaboration

Call Center

Donor Fundraising

Membership Management

Internal Collaboration

And not only that, you help them achieve their goals



Engagement
Membership
Call Center
Development
Community
Collaboration

Call Center

Donor Fundraising

Membership
Management

Internal
Collaboration

Development Team Home Chatter Campaigns Leads Accounts **Contacts** Affiliations Donations Recurring Donations Gift Entry Funding Programs More

Contact **Ms. Rachel Morris** + Follow Edit Delete Edit Fees Relationships Viewer Search LinkedIn New Gift New Donation New In-Kind Gift

Account Name: Morris Household Member Since: 9/28/2017 Current Membership Type: 4_Family Mobile: (773) 508-7946 Profile Icon

New Membership Freeze Membership Unfreeze Membership Cancel Memberships Transfer Memberships New Program Registration Withdraw Program Registration

Summary Details Giving Connections Communications Timeline More

Cases (1) New

Case	Subject	Priority	Date/Time Opened
00001043	When Will the Downtown Branch ...	High	8/18/2020 7:04 PM

View All

Content Group Access (0) New

Gather Event Statistics (0) New

Memberships (1) New

Membership Name	Membership Type	Membership Status	Membership Start Date
Mem-00014	4_Family	Complete	9/28/2017

View All

Activity **Einstein** Chatter

Propensity to Renew

64% LIKELIHOOD

LEADING CAUSES

- + 18.53 Registered For Tour Of Branch Location
- + 11.15 Engaged In Membership Discussion
- 6.052 Partial Program Utilization At Local Branch
- 3.01 Only 1 Visit This Month

HOW TO IMPROVE THIS

By doing do so, you create more complete members



Engagement
Membership
Call Center
Development
Community
Collaboration

Call Center

Donor Fundraising

Membership
Management

Internal
Collaboration

*Using AI for top
level service so
members stay
engaged in ways
they like*

Development Team Home Chatter Campaigns Leads Accounts Contacts Affiliations Donations Recurring Donations Gift Entry Funding Programs More

Contact Ms. Rachel Morris

Account Name: Morris Household Member Since: 9/28/2017 Current Membership Type: 4_Family

Summary Details Giving Connections Communications Timeline

Cases (1)

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00001043	When Will the Downtown Branch ...	High	10/20 7:04 PM

Content Group Access (0)

Gather Event Statistics (0)

Memberships (1)

Membership Name	Membership Type	Membership Status	Membership Start Date
Mem-00014	4_Family	Complete	9/28/2017

Activities Einstein Chester

Propensity to Renew

64% LIKELIHOOD

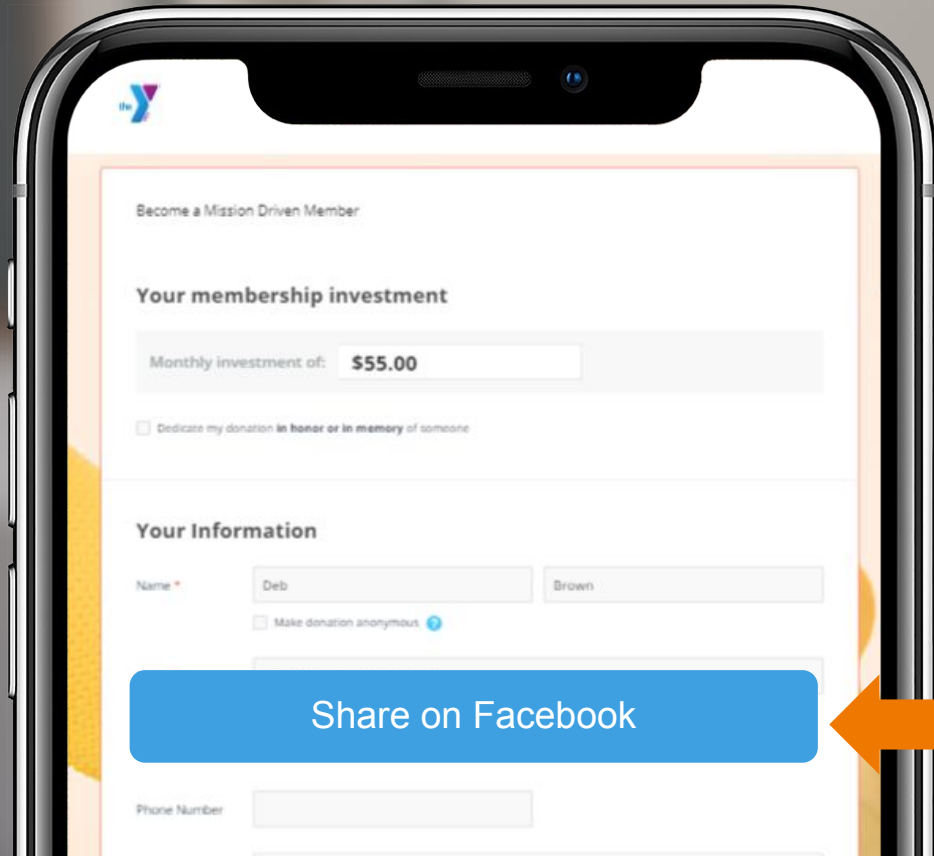
LEADING CAUSES

- + 18.53 Registered For Tour Of Branch Location
- + 11.15 Engaged In Membership Discussion
- 6.052 Partial Program Utilization At Local Branch
- 3.01 Only 1 Visit This Month

HOW TO IMPROVE THIS

- + 21.2 If Engaged In A Membership Location
- + 3.78 If Purchase Additional Branch Program
- 5.76 If All Household Members Utilizing

More complete members are your best advocates



Engagement
Membership
Development

*Maximizing a member moment.
Nothing is better than a
first-party referral.*

- Donor Fundraising
- Membership Management
- Mobile Engagement
- Social



Engagement
Membership
Call Center
Development
Community
Collaboration

Donor Fundraising

Mobile Engagement

Social

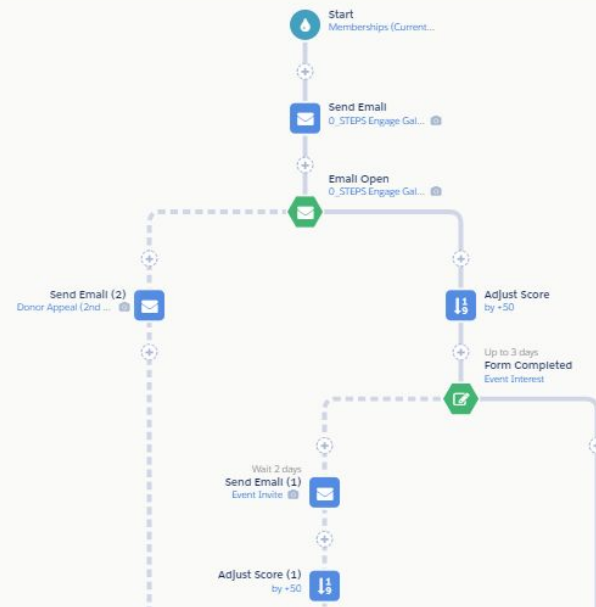
ENGAGEMENT STUDIO

Y Member Donations Paused

Select Copy Start

BUILD TEST REPORT ACTIVITY

Search this program



Now you have a chance to introduce all the Y has to offer

< Inbox (8)

From: [Downtown YMCA](#)

To: Rachel Morris

Don't forget about us
[WEB VERSION](#)

WE'VE BEEN HERE BEFORE

And others will learn from our leadership



- Industrial Revolution
- American Civil War
- Progressive Era
- WWI
- 1918 Flu Pandemic
- The Great Depression
- WWII
- Polio
- Cold War
- Civil Rights
- Antiwar Movement
- Gender Equality
- AIDS Crisis
- Tax Challenge
- 9/11
- The Great Recession
- COVID - 19

Psst, Rachel!


176 Years has taught us a lot.

We appreciate your donation. investing back into our community during this time of need we provide daycare to first responders and feeding students who can't get meals at school. We're reimagining gyms, camps, and classes and virtualizing what we can!

[Learn about Virtual Camps](#)


Your best advocates activate others in the community




 **Rachel Morris**
August 8 at 12:03 PM · 🧑🏻 · 📍



I'm ready with my keyboard and camera to lead the way for Sophia. We'll be participating in our first 'virtual family camp' this summer. Who's with me?

VIRTUAL Y ARTS




 Lesson Plans To Do From Home


 Arts Video Lineup

yourmca.org/familycamp
YMCA Family Summer Camp
Joins us on for our first ever Virtual Family Camp.

  Celeste Tarantola, Matt Beck and 11 others

1 Comment

 Like  Comment  Share

 **John Watson** We're in! So ready to do something fun. Staying mentally healthy ain't been easy, Rachel, we're ready to dial in to create camp memories for sure.

Challenge accepted. A new event registrant and another opportunity to acquire a new member, donor and/or volunteer.





SAY HELLO TO

John



41 years old; not married; owns his own business



Individual gym membership



Exploring virtual options



Potential Major Donor

A site visit brings John in as a Virtual Program lead



Engagement
Membership
Call Center
Development
Community
Collaboration

Membership
Management

Mobile Engagement

Social

salesforce | pardot

Q Search

HOME > MARKETING
Visits

Tools ▾

DURATION	PAGE VIEWS	FIRST PAGE VIEWS	LAST PAGE VIEWS
	1 page	Aug 12, 2020 6:11 PM	Aug 12, 2020 6:11 PM
over 2 minutes	3 pages	Aug 11, 2020 1:47 PM	Aug 11, 2020 1:50 PM
over 51 seconds	2 pages	Aug 10, 2020 10:28 PM	Aug 10, 2020 10:29 PM
over 54 minutes	6 pages	Aug 10, 2020 7:56 PM	Aug 10, 2020 8:50 PM

Visitor

Prospect [Create / associate](#)

Page Views 12

Source

- <https://m.facebook.com>
- Facebook - ://m.facebook.com
- <https://lm.facebook.com>
- Facebook - ://lm.facebook.com

Hostname c-76-21-2-168.hsd1.ca.comcast.net

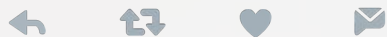
First Page View Aug 17, 2020 7:56 PM

Last Page View Aug 17, 2020 6:11 PM



@JWatson28 Glad to hear you had an amazing camp experience. We've reimaged most events and services and they are now virtual! What was your favorite summer camp experience as a kiddo?

8:12 AM



Successful registration for a more complete view



Engagement
Membership
Call Center
Development
Community
Collaboration

Donor Fundraising

Internal
Collaboration

Contact **John Watson**

+ Follow Edit Delete Edit Fees Relationships Viewer Search LinkedIn New Gift New Donation New In-Kind Gift

Account Name Watson Household Member Since Current Membership Type Mobile (778) 385-7023 Profile Icon

New Membership Freeze Membership Unfreeze Membership Cancel Memberships Transfer Memberships New Program Registration Withdraw Program Registration

Summary Details **Giving** Connections Communications Timeline More

Donations (2) New

John Watson \$200 Donations 02/25/2020		Traction on Demand \$200 Matching Donation 02/25/2020	
Stage:	Posted	Stage:	Posted
Amount:	\$200.00	Amount:	\$200.00
Close Date:	2/25/2020	Close Date:	2/25/2020

[View All](#)

Recurring Donations (0) New

Donor information

Donor Level	Donor Previous Level
Bronze	
First Gift Date	Last Gift Amount
2/25/2020	\$200.00
Last Gift Date	Largest Gift
2/25/2020	\$200.00
Average Gift	Smallest Gift
\$200.00	\$200.00
Best Gift Year	Best Gift Year Total
2020	\$200.00

We found no potential duplicates of this contact.

[Get Wealth Info](#) [WE Research Details](#)

Drag and drop a photo to be used here

[Camera](#)

Activity Chatter Files SMS

New Task New Event Log a Call Email

Predicted Propensity to Give 75%

They are highly active and engaged with your

Successful participation followed by acquisition of new donor

Important time to steward a major gift with a wealth screening and AI propensity to give.



- Engagement
- Membership
- Call Center
- Development
- Community
- Collaboration

Get Wealth Info **WE Research Details**

Donations (2)

John Watson \$200 Donations 02/25/2020	Traction on Demand \$200 Matching Donation
Stage: Posted	Stage: Posted
Amount: \$200.00	Amount: \$200.00
Close Date: 2/25/2020	Close Date: 2/25/2020

Recurring Donations (0)

Donor information

Donor Level	Donor Previous Level
Bronze	
First Gift Date	Last Gift Amount
2/25/2020	\$200.00
Last Gift Date	Largest Gift
2/25/2020	\$200.00
Average Gift	Smallest Gift
\$200.00	\$200.00
Best Gift Year	Best Gift Year Total
2020	\$200.00

Predicted Propensity to Give 75%

They are highly active and engaged with your organization and are more likely to give.

Donor Fundraising

Internal Collaboration

The lifecycle of another donor/member begins

the YMCA
Sponsored

2020 Virtual Gala!

the YMCA

Be a child's superhero - Not all Heroes wear capes!

GIVE FOR A BETTER US

Super Gala 2020! [Join!](#)





More than just virtual programs



Home

My Registrations

My Purchases

Live Classes

On Demand Classes

Events

More >



Be a child's superhero - Not all Heroes wear capes!

[Event Home](#) [Full Agenda](#) [Attendees](#) [Red Carpet](#) [Dinner](#) [Discussion](#) [Resources](#) [FAQ](#)

Up Next



Welcome Address

Settle into your seat, pour a drink and join Greg Malpass as he kicks off our Be a Child's Superhero Event with a welcome message to all attendees.

TODAY • 2:30 PM - 3:00 PM



Keynote

Join us to hear Michelle Malpass discuss how the YMCA, its staff and volunteers around the world are working to improve lives through our key initiatives!

TODAY • 3:00 PM - 4:00 PM



Virtual Tables

Breakout into your virtual table to share stories of inspiration!

TODAY • 4:00 PM - 5:00 PM



Dinner

Enjoy your lunch with our leaders! This is a great chance to meet other donors and share common interests!

TODAY • 5:00 PM - 6:00 PM



Appreciation Video & Wrap-Up

Join us as we honor our donors with videos and special messages from all of us.

TODAY • 6:00 PM - 7:00 PM

Fundraising Goal



DONATE NOW

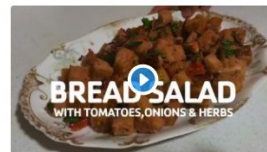
Tweets from @ymca



ymca

@ymca

Using everyday ingredients to make great food! Today we're cooking up Bread Salad with Tomatoes, Onions, & Herbs! 🥗 (Full recipe: bit.ly/mattsbreadsalad) YMCA Matt will be sharing these simple recipes every Wednesday! Try out this easy dish today. #ForABetterUs #recipes



1h



ymca Retweeted



YMCA Government Relations

@YMCAadvocacy

Don't wait! Get #voteready today:

- 👤 Look up your voter registration status
- 🗳️ Learn about what your options are for casting your ballot
- 🗳️ Find out what's on your ballot
- 🗳️ Check if you need ID to vote
- 🗳️ Make a plan



IT'S TIME TO GET #VOTEREADY!

2020



DF





The Digital Engagement Hub - YMCA's Virtual Branch



Browse Memberships

Browse Registrations

My Details ✎

Birthdate 1991-01-01	Age 29	Gender Male
Mobile Phone 7788750021	Personal Email john@watson.com	Member Since 2020-08-12
Current Membership Start Date 2020-08-12	Current Membership Status Active	Current Membership Type 1 Young Adult + Multiple Youths

Enrollments for Watson Household

- > Active Enrollments (3)
- > Waitlisted Enrollments (0)
- > Draft Enrollments (1)
- > Completed Enrollments (0)
- > Withdrawn Enrollments (0)

Scheduled Payments

NICKNAME Karen's	CARD TYPE Visa	EXPIRATION WITH 1111 3/25	NEXT PAYMENT \$355.00 <small>on 9/1/2020</small>
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[More Information & Future Payments >](#)

Home
Join
Register
My Registrations
My Purchases
Virtual Programs
Events
More >

Live Virtual Programs

DELIVERED TO YOU, WHEREVER YOU ARE

Here, you will find a set of virtual tools, open-air resources, and information you can put to use while we all comply with public health efforts. It's our way of helping you to stay active, healthy and connected in your own home, and in your own time.

Upcoming Group Exercise Classes

Host or Instructor: All

<
1/3
>

Chair Quick Fit
Fun and easy to follow stretches for active older adults.
TODAY + 12:00 PM - 1:00 PM

Group Centery
Whether you are new to exercise or a seasoned athlete, a personal trainer can make sure that you...
TODAY + 4:00 PM - 4:45 PM

Spin to Win
Spin to Win is a 60 minute indoor cycling class with the thrill of energetic music. Group exercise class wit...
TODAY + 5:30 PM - 6:30 PM

Monster HIIT
High intensity interval training or HIIT is defined as short, intense, unsustainable bursts of physical...
TODAY + 8:00 PM - 9:00 PM

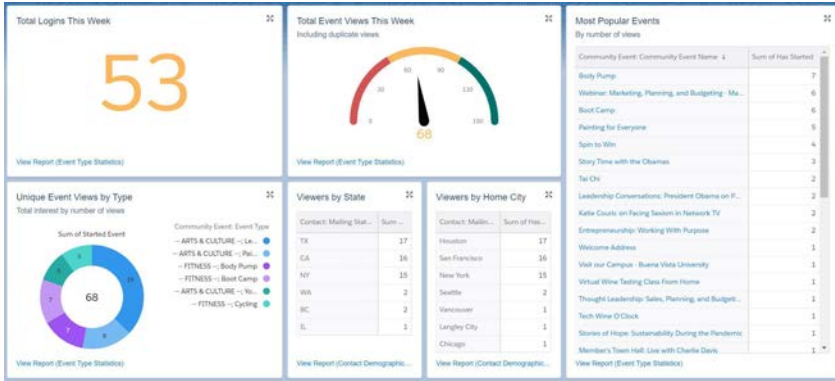
Boot Camp
The boot camp workout consists of cardio (running or walking, plyometrics), strength training (weights)...
Aug 27 + 6:00 AM - 7:00 AM

Body Pump
Body Pump is the original barbell class that shapes, tones and strengthens your entire body focusing on...
Aug 27 + 7:00 AM - 8:00 AM

Group Power
Exercising with others in a class is motivating and fun. Build flexibility, strength and cardio fitness in Group...
Aug 27 + 8:00 AM - 9:00 AM

Silver Sneakers Yoga
Gentle yoga classes are typically described as appropriate for those who want a softer, nurturing...
Aug 27 + 8:00 AM - 10:00 AM

Powerful User Insights to Create Relationships & Drive Donations



Most Frequent Viewed

Event Attendance history

Track Virtual Visits



Top Personal Preferences

Event Social Engagement

Individual Viewing Behaviour



Voyage Roadmap

Where do we go from here?

1

Connect



2

Collaborate

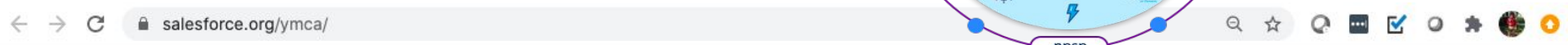


3

Drive Impact



#teamworkmakesthedreamwork



- Nonprofit Cloud
- Education Cloud
- Philanthropy Cloud
- Resources
- Giving Back
- About Us
- COVID-19



MAKING MEMORIES THAT MATTER

Watch the video of five-year-old Wilson tackling his first triathlon and see how that engages and enriches him, his family and the Y community.



THANK YOU



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One Platform for Fundraising

Break down internal silos | engage everyone across the organization

