



Artsmarketing Services Case Study: Carnegie Museums of Pittsburgh: Marrying Technology and the Art of Conversation

THE CLIENT:

Carnegie Museums of Pittsburgh (CMP) has a fascinating history dating back over 120 years. Combining four dynamic and distinctive museums – Carnegie Museum of Art, Carnegie Museum of Natural History, Carnegie Science Center and The Andy Warhol Museum – which explore all kinds of worlds, engage diverse communities, and enlighten countless individuals, CMP is an essential cultural institution benefiting the regional economy, schools, school children, families and individuals throughout Pittsburgh and Pennsylvania and beyond. Each year more than 1.3 million people visit one of CMP's museums or participate in CMP programs. Ultimately, the most precious benefit and the heart of what CMP stands for is the opportunity for anyone to step aside, learn something new, reflect, think, and then return to their daily activities refreshed, refocused and reengaged.



THE SCENARIO:

Artsmarketing Services (AMS) first began speaking with CMP about membership telemarketing initiatives in 2011 at a time when CMP was already engaged in a long standing relationship with another vendor. CMP was experiencing stagnant or declining results and was disappointed and frustrated with the quality of the automation that vendor provided. In 2011 CMP and AMS began discussing options:

What would a seamless transition to AMS look like?

How would AMS deliver a reliable automation tool that provides real-time reporting and accurate accounting?

How would AMS manage lead delivery and reporting for hundreds of individual lead segments each with their own monthly start and stop date?

What campaign leadership and support should CMP expect from AMS?

Without satisfactory answers to these types of questions, CMP was not going to be able to achieve the growth that they required in their Membership program without micro-managing the vendor engaged to deliver the services. Ultimately these conversations led CMP to confidently select AMS as a partner to conduct its Membership Telemarketing Campaign beginning in January 2014.

Artsmarketing Services Inc.

260 King Street East, Suite 500, Toronto, Canada M5A 4L5 Telephone: (416) 941-9000 www.artsmarketing.com



THE STRATEGY:

After examining the situation at CMP and understanding the needs of the organization moving forward, AMS developed a three-step initiative to kick-start the partnership and provide a foundation for the campaigns that lay ahead. These included:

Step One: To ensure a smooth and seamless transition and provide CMP with as many avenues of support as possible both prior to campaign start-up and once the campaign was in operation, AMS created the “CMP Cross Functional Team”, which consisted of AMS personnel in the Marketing, Operations, Data/IT and HR departments. This team worked collaboratively as a unit and with their CMP counter-parts in the period leading up to AMS assuming responsibility for the calling.

This ensured a smooth campaign launch and set-up the first year of calling for success.

Step Two: AMS employed our unique story-based scripting methodology to develop conversation plans specific to each individual lead segment. Scripts were developed for current and lapsed member and donor leads which reflected individual history allowing callers to reference past experiences at CMP rather than simply the benefits of membership or a transactional call.

Step Three: ALCHEMY, the proprietary lead management and report software developed by AMS, was integrated into the phone room. Lead information including past history is distributed directly to the callers’ computers where they disposition call outcomes and enter orders live. In addition to being a powerful tool that empowers the Campaign Manager to assign leads and ensure that the most cherished leads are distributed into the hands of the most skilled callers to maximize results, **ALCHEMY** also provides a suite of campaign reports detailing up-to-the-minute metrics and campaign outcomes.

DON'T FORGET THE PHONE!

Devin Mathias, a consultant with New York City firm Marts & Lundy, in a May 2014 Association of Fundraising Professionals (AFP) article recommends that direct marketing – including a telephone program – remain a part of your ongoing fundraising strategy¹. Stephen F. Schatz, CFRE, co-founder of The Development Center and author of *Effective Telephone Fundraising: The Ultimate Guide to Raising More Money* (2010), reminds us that “It’s all about the call. Despite the advent of sophisticated fundraising methods via the internet, social media, and other online platforms, the bottom-line truth is: good old-fashioned telephone fundraising still works, bringing in over one billion dollars annually from generous Americans. It’s a wellspring of untapped funds your nonprofit could be reaping.”² So don’t neglect the phone as a key channel in your membership and fundraising strategy. If incorporated well, not only will the phone grow revenue, it will deepen patron relationships and play a key role in your stewardship program.

THE RESULTS:

Thanks to the “CMP Cross Functional Team” established by AMS several months prior to the start of the 2014 campaign, the launch was a seamless

transition from the previous vendor. AMS was deliberately careful to ensure that open lines of communication existed with the client at all levels. Additionally, AMS sent extra staff to the client's call center before and during the launch in order to provide additional support to the Campaign Manager. In 2014 AMS was able to fully executing its strategy with no loss in momentum and provided CMP with enhanced results and electronic reporting. AMS provided the statistical analysis that CMP was looking for on all components of their telemarketing operations including membership, annual fund, additional gift and corporate fundraising. The 2014 campaign concluded with nearly **\$660,000** in revenue from more than **3,100 members and donors** with an average of **\$212**.

For the 2015 campaign, AMS refined some of the scripting in an effort to increase both the total revenue and overall gift average. Utilizing a stronger and more tailored approach to members and a very similar lead segmentation strategy allowed for a 17% increase in performance year over year. The 2015 campaign produced almost **\$770,000** from nearly **3,500 members** with an average gift of **\$221**.

Campaign Year	Total Revenue	Total Members	Membership Average
2014	\$658,841	3,109	\$212
2015	\$769,589	3,480	\$221
2016	\$653,802	3,121	\$209
Total	\$2,082,232	9,710	\$214

CMP has now partnered with AMS for 2017 – a fourth consecutive year. Now nearing completion, the campaign is trending towards achieving continued growth coupled with consistent excellence in customer service. AMS expects to deliver consistent improved campaign results for CMP for many years to come.

ALCHEMY – AMS’ LEAD MANAGEMENT & REPORTING SYSTEM:

ALCHEMY is a proprietary lead management and robust reporting system that was developed by AMS after more than five years of testing. **ALCHEMY** achieves optimal telemarketing efficiencies and outcomes by enhancing organizational performance and maximizing revenue growth. Because the best telephone experiences are created by the talent of the callers, **ALCHEMY's** lead orchestration management system reduces the learning curve and increases the performance of every caller on the campaign – lower priority leads can be utilized for training purposes while progressively higher priority leads can be distributed in a graduated manner as the skills of callers improve. This, in turn, ensures that the most valued leads are given to the most experienced and effective callers for the best campaign results.

ALCHEMY is available through secure web-based or VPN access 24/7. Service is supported through service hubs located in Pacific, Central and Eastern Time zones. Integrated telephony provides the professional, high-touch, patron-centric technologies of preview dialing. Information exchange is private, confidential and safe via secure FTP or by AES-256 encrypted and compressed files, with credit card data fully masked through encryption. Data transmission is seamless and allows your system to upload any or all campaign results via Excel or csv files.

ALCHEMY is fully PCI compliant and has an extremely robust reporting tool for outcome measurement. Choose from over 150 individual reports designed for Campaign Managers to effectively and efficiently manage a telemarketing campaign. Some of the benefits of **ALCHEMY** include:



✓	Preview Lead Technology automatically creates distinctive leads	✓	Maximizes lead potential from each available segment
✓	Timeline lead release to manage all leads entering and leaving the call room	✓	Controls the number of calls by lead and manages the interval between calls
✓	Patron data feedback captured and updated in real-time	✓	Specific lead segments are directed to specific callers for patron-centric outcomes
✓	Leads are updated in real-time and managed by time zone	✓	Promptly reassigns leads and also alleviates lead hoarding by callers
✓	Provides lead analysis and integrated management for centralized campaigns and ad hoc "Do Not Call" and "Kill" files	✓	Strong motivational tool for better call performance allowing the Manager to assess call outcomes for each caller
✓	Automatically schedules call-backs and assigns them to the most appropriate caller	✓	Lead orchestration facilitated across multiple departments with integration across different departments and/or programs

ALCHEMY also offers analysis of Key Performance Indicators (KPIs) such as:

✓	Dollars Per Completed Call	✓	Participation Rates
✓	Contact Percentage	✓	Completion Percentage
✓	Upgrade Percentage / Downgrade Percentage	✓	Records to be "removed from the lead pool"
✓	Attempts Per Contact	✓	Dials Per Hour
✓	Completes Per Hour	✓	Contacts Per Hour
✓	Average Pledge / Membership	✓	Average Gift
✓	Matching Gift Percentage	✓	Conversion Rates
✓	Performance by Lead Segment	✓	List Penetration
✓	Refusal Rates	✓	Refusal Reasons
✓	Individual Caller Results	✓	Individual Callback Rates
✓	Patron Feedback	✓	Credit Card Percentage

ABOUT CARNEGIE MUSEUMS OF PITTSBURGH:

Founded in 1895 the Carnegie Museums of Pittsburgh (CMP) is a collection of four creative, inspiring, thought-provoking places of exploration: Carnegie Museum of Art, Carnegie Museum of Natural History, Carnegie Science Center, and The Andy Warhol Museum. CMP educates young people and attracts lifetime learners of all ages. CMP is the largest, most far-reaching cultural organization in the Pittsburgh region, known throughout the world for its vast art and scientific collections and its scientific research. CMP is community leader in educational outreach. For more information about CMP please visit www.carnegiemuseums.org.

ABOUT AMS:

Offering individually designed telephone fundraising and subscription services to the North American non-profit community since 1982, Artsmarketing Services (AMS) focuses on partnerships. AMS creates strategic, data-driven, high-touch and relationally focused telephone campaigns for our clients the deepen member and donor engagement and consistently achieve optimal results. In addition to full services Membership campaigns (renewals/upgrades, lapsed reactivation, new acquisition), Annual Fund campaigns (monthly conversions/upgrades, renewals, lapsed reactivation, new acquisition), Capital and Endowment Fund campaigns, and, Subscription campaigns, our specialties also include our **LEGACY BUILDER™** campaigns which have resulted in over **25,000 bequest** identifications estimated at more than **\$700 million**.



Utilizing state-of-the-art custom analytics, tailored scripting and mission-oriented professionals, AMS has raised over **\$1 billion** in Annual Fund donations, Memberships and Subscriptions from more than **3 million new supporters** over the last **three decades**.

CONTACT US:

Call us – toll free – from anywhere in the USA, Canada, or Australia 888-941-9333 or visit www.artsmarketing.com to learn more or to schedule a free personal consultation.

Mark Douglas Trask
Vice President, Marketing and Sales
mtrask@artsmarketing.com
416-941-1041 x 225

Ruth Eggherman
Director of Marketing and Sales
reggherman@artsmarketing.com
415-539-7585

¹ Mathias, Devin (2014). Four Current Annual Giving Trends and How to Incorporate Them into a Fundraising Plan from <http://www.afpnet.org/ResourceCenter/ArticleDetail.cfm?ItemNumber=24465>.

² Schatz, Stephen F. (2010). Effective Telephone Fundraising: The Ultimate Guide to Raising More Money. Wiley (from <http://ca.wiley.com/WileyCDA/WileyTitle/productCd-0470560592.html>).