

Business and Fund Development Campaigns



Client Roundtable

September 26, 2024



POP IN CHAT:

What are you most hoping to get out of our roundtable today?



WHY USE PROPFUEL FOR BUSINESS DEVELOPMENT?

- Longer relationship building
- Status check of where prospects are
- Help you know where to focus your efforts
- Automate follow-up




RELEVANT BLUEPRINTS



Sponsors/Exhibitors Category:
Sponsor or Corporate Partner Acquisition

Fundraising/Advocacy Category:
Fundraising

 APFC
ADVANCING THE COMMON INTERESTS OF CALIFORNIA PROPANE

Hi there,

As we look to the future, we're thrilled about the possibility of teaming up with organizations that share our passion for making a meaningful impact. Our community is vibrant and engaged, always looking for partners who bring fresh ideas and genuine value.


We believe that by working together, we can create something truly special that benefits everyone involved. I would love to discuss how we might collaborate and explore the opportunities a corporate partnership could offer.

Are you interested in becoming a corporate partner?

Yes, tell me more

No, not at this time

I'm not the appropriate decision maker

 APFC
ADVANCING THE COMMON INTERESTS OF CALIFORNIA PROPANE

Hello there,

Thanks for being a part of our community!

To help us further our mission and create a lasting impact on the industry, we'd like you to consider making a financial donation to APFC-MB.

If you're not able to at this time, there are other ways you can lend your support! Your involvement matters so much to us, so please let us know:

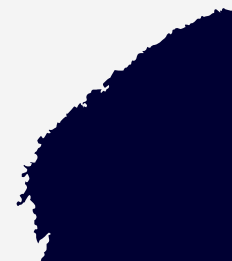
How can you support APFC-MB this year?

I'll provide a financial contribution

I'm interested in volunteer opportunities

I'll help spread the word on social media

Something else





CONSIDER MAKING IT EVERGREEN



Sequence (drip) campaigns that continuously enroll contacts without the need for frequent updates.

Examples:

- Nurture new prospects
- Nurture the “yes” or “maybe” - check-in periodically





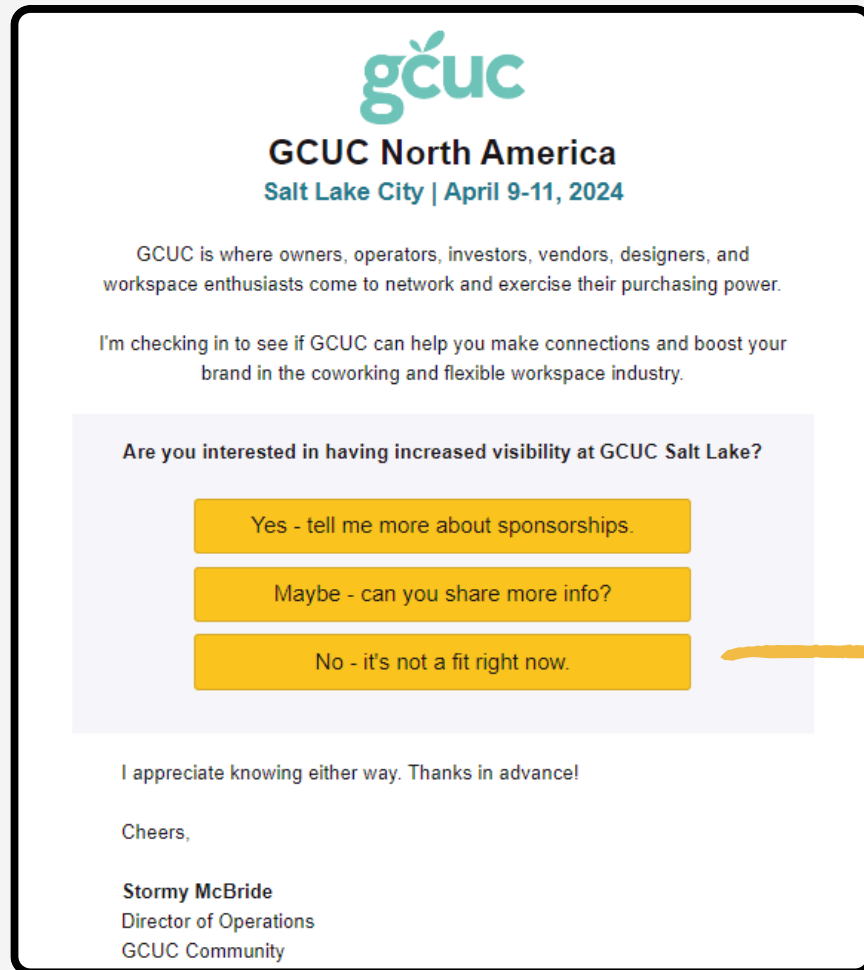
POP IN CHAT:

What's your biggest pain point with sponsors or partners?

SPONSOR ACQUISITION

**Blueprint
Available**

- Single check-in per conference
- Targeted list of potential partners
- 12% response rate
- 11 companies expressing interest



gcuc
GCUC North America
Salt Lake City | April 9-11, 2024

GCUC is where owners, operators, investors, vendors, designers, and workspace enthusiasts come to network and exercise their purchasing power.

I'm checking in to see if GCUC can help you make connections and boost your brand in the coworking and flexible workspace industry.

Are you interested in having increased visibility at GCUC Salt Lake?

Yes - tell me more about sponsorships.

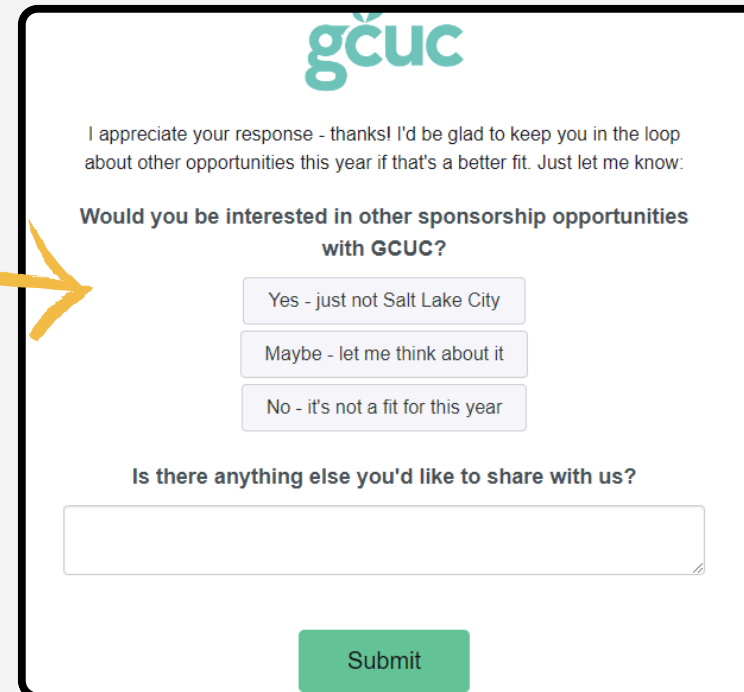
Maybe - can you share more info?

No - it's not a fit right now.

I appreciate knowing either way. Thanks in advance!

Cheers,

Stormy McBride
Director of Operations
GCUC Community



gcuc

I appreciate your response - thanks! I'd be glad to keep you in the loop about other opportunities this year if that's a better fit. Just let me know.

Would you be interested in other sponsorship opportunities with GCUC?

Yes - just not Salt Lake City

Maybe - let me think about it

No - it's not a fit for this year

Is there anything else you'd like to share with us?

Submit

SPONSOR PROMO

- Outreach to registered attendees two weeks ahead of event
- Each led to a meeting booking link so they could commit to a day/time in advance
- **10% booked a meeting with at least one partner!**



GCUC North America
Salt Lake City | April 9-11, 2024

GCUC Salt Lake City is just around the corner! As part of our commitment to enhancing your experience, we want to ensure you have the opportunity to easily connect with top tier industry providers.

These leaders are eager to showcase their products and services, tailored to meet your needs. Whether you're looking to explore cutting-edge solutions or simply seeking valuable insights, scheduling a meeting with them is the perfect way to maximize your time prior to arriving or even at the event.

To arrange a meeting, simply click on the links below to access their calendars and select a time that works best for you. You can select more than one!

Who would you like to meet with at GCUC Salt Lake City?

Yardi Kube

Vari

Flexspace

Officernd

Coworks

We look forward to seeing you in Salt Lake City!

Cheers,

Stormy McBride
Director of Operations
GCUC Community

ADVERTISING



3PL Perspectives is a monthly magazine made available to all TIA members to inform and educate them of the latest trends on the Logistics Industry.

Are you interested in being featured in an upcoming 3PL Perspectives magazine?

Yes, absolutely!

Maybe, please tell me more.

No, it's not a fit at this time.

Sincerely,

Wendy Emerson
Senior Services Manager
Transportation Intermediaries Association



3PL PERSPECTIVES

Thanks! As a TIA member, there are two main ways you can contribute and be featured in upcoming editions of the magazine:

- 1. Lend your expertise by writing an article.** TIA looks for articles to be informative rather than advertorial. The article should represent a current issue, trend, or tip to help members of the organization better understand the state of the Logistics Industry. Each month's magazine focuses on a different theme, so we'll align your content with the most appropriate edition.
- 2. Consider advertising for a cost-efficient way to increase visibility.** We are currently offering a 25% discount on full, 1/2 or 1/4 page color ads through this year with a 3 or 6 month commitment for the spots we have remaining for 2024.

Which is a better fit for your company this year?

Writing an article

Advertising

Both

I'm not sure yet

Submit



CORPORATE PARTNER ACQUISITION

Blueprint
Available

PAYTECH WOMEN
Formerly Wnet.

Megan-

As the leading force for gender diversity and inclusion in payments and fintech, PayTech Women (PTW) is shattering glass ceilings and paving the way for a more equitable future.

In a sector that thrives on forward-thinking solutions, diversity is not just a buzzword; it's the lifeblood of progress.

By partnering with us, you join a dynamic movement that is advancing women's leadership in payments and fintech. We invite you to be part of the change that reshapes our industry and creates a brighter, more inclusive future.

Are you interested in learning more about becoming a PayTech Women Corporate Partner?

Yes, tell me more

No, thanks

I'm not the appropriate decision maker

- 2 check-ins sent to prospective corporate partners
- 3% engagement rate
- Led to **20 hot prospects** 🔥
- Potential of \$100k+ in revenue!!

If Question Answered matches Selection = Yes, tell me more

Then Show Text on Landing Page

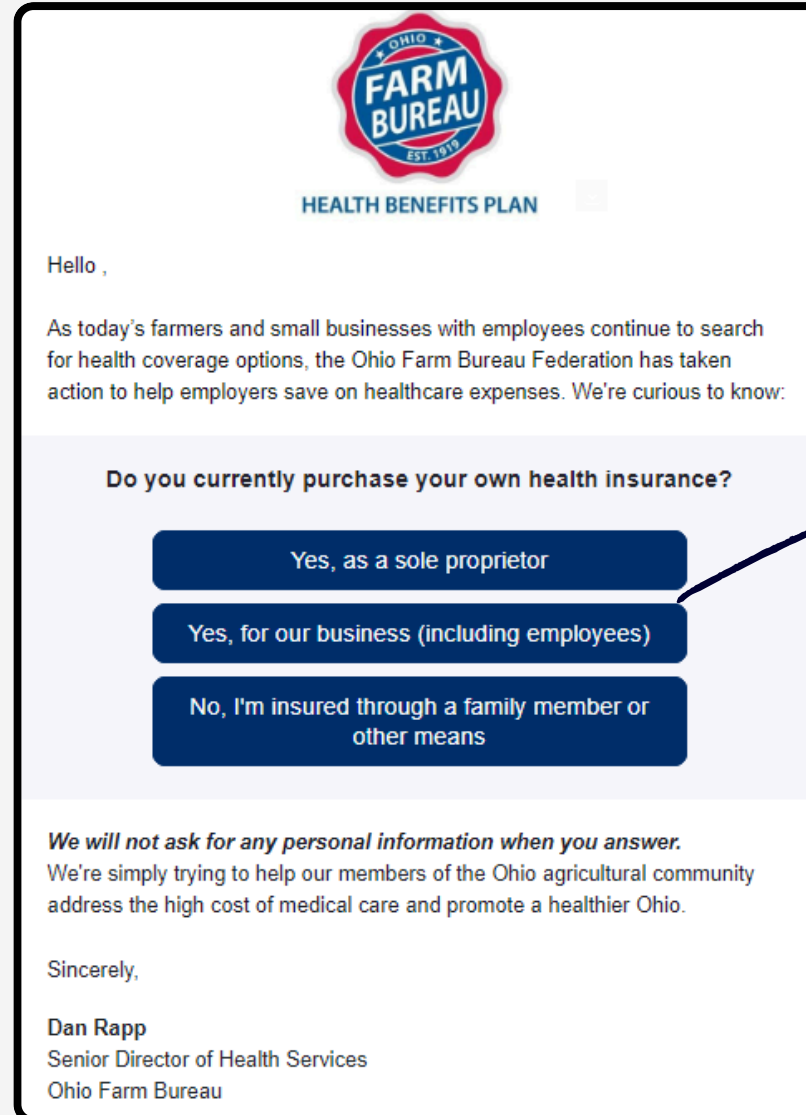
and Add Tag(s) to Contact - Corp Partner Program - Hot Lead


and Remove from this Campaign

and Send Internal Alert

HEALTH BENEFIT PLAN: CUSTOMER ACQUISITION

- Contacted all members not enrolled (33K)
- 8% engagement rate
- 470 expressed interest




HEALTH BENEFITS PLAN

Hello ,

As today's farmers and small businesses with employees continue to search for health coverage options, the Ohio Farm Bureau Federation has taken action to help employers save on healthcare expenses. We're curious to know:

Do you currently purchase your own health insurance?

Yes, as a sole proprietor

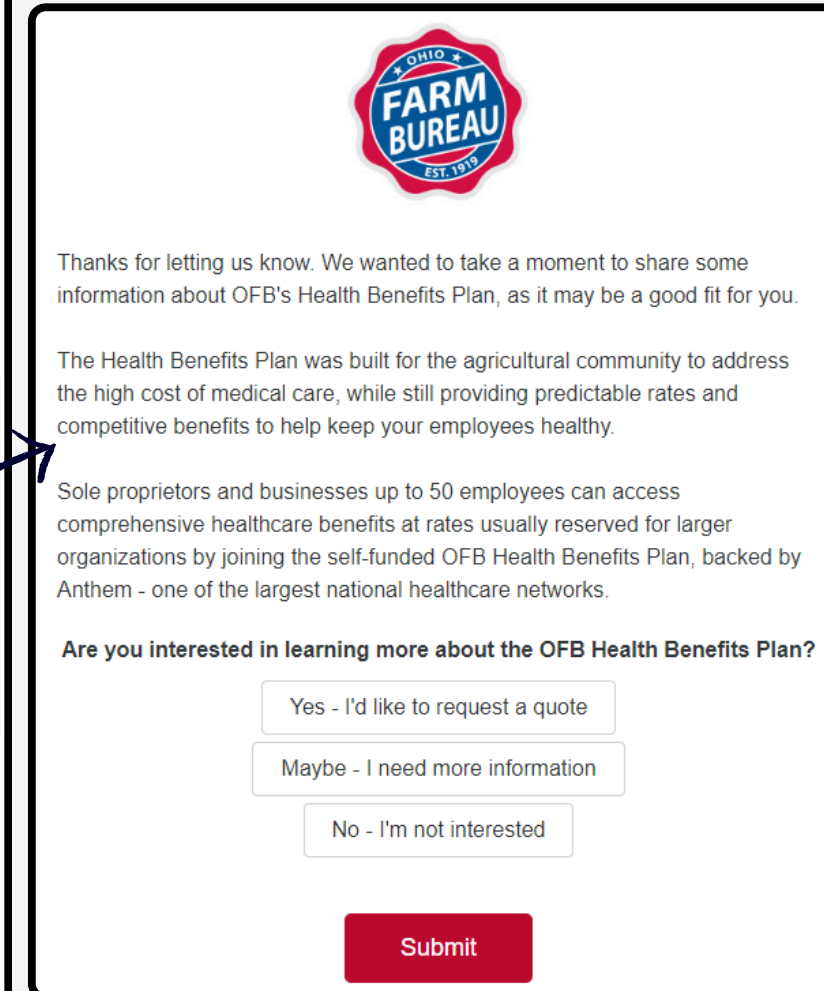
Yes, for our business (including employees)


No, I'm insured through a family member or other means

We will not ask for any personal information when you answer.
We're simply trying to help our members of the Ohio agricultural community address the high cost of medical care and promote a healthier Ohio.

Sincerely,

Dan Rapp
Senior Director of Health Services
Ohio Farm Bureau





Thanks for letting us know. We wanted to take a moment to share some information about OFB's Health Benefits Plan, as it may be a good fit for you.

The Health Benefits Plan was built for the agricultural community to address the high cost of medical care, while still providing predictable rates and competitive benefits to help keep your employees healthy.

Sole proprietors and businesses up to 50 employees can access comprehensive healthcare benefits at rates usually reserved for larger organizations by joining the self-funded OFB Health Benefits Plan, backed by Anthem - one of the largest national healthcare networks.

Are you interested in learning more about the OFB Health Benefits Plan?


Yes - I'd like to request a quote

Maybe - I need more information

No - I'm not interested

Submit

HEALTH BENEFIT PLAN: NURTURE LEADS



HEALTH BENEFITS PLAN

Dear ,

Thanks for letting us know you're interested in learning more about the Ohio Farm Bureau Health Benefits Plan. I wanted to follow up with you today to ask:

Would you like to request a quote?

Yes, please.

Not at this time.

I'd be glad to answer any questions you have. You can reach me at drapp@ofbf.org or by calling 1-800-937-4567.

Sincerely,

Dan Rapp
Senior Director of Health Services
Ohio Farm Bureau


“It has been much better than I imagined for member engagement. I probably would have done this in waves had I known the response would be this strong.”

PRO TIP:
Create automated follow-ups to nurture those that express interest!

HEALTH BENEFIT PLAN: RETENTION

- 2 check-ins to existing customers: NPS, satisfaction
- **31 testimonials collected from promoters**
- Dozens of open-ended responses

16%
Engagement
Rate



HEALTH BENEFITS PLAN

Dear ,

Thank you for being a participant with the Ohio Farm Bureau's Health Benefits Plan. We'd appreciate a brief moment of your time to collect your feedback.

Given your experience with Ohio Farm Bureau's Health Benefit Plan, how likely would you be to recommend it to others?

0 1 2 3 4 5 6 7 8 9 10

Sincerely,

Dan Rapp
Senior Director of Health Services
Ohio Farm Bureau



POP IN CHAT OR UNMUTE:

What are some other ways you give sponsors or partners increased visibility?

FUNDRAISING



Dear Ashley,

Many of our members choose to name TU as a beneficiary of their wills, trusts, or financial accounts. To recognize their generosity and foresight we created the **Stream Guardian Society**. Whether drawn to TU by fishing, conservation, or often both, our Stream Guardians have created plans that will help TU ensure the health and integrity of our coldwater fishing habitats.

Wherever you are in the planning process, we have a variety of resources to assist you in adding Trout Unlimited to your will.

Are you considering adding Trout Unlimited to your will?

Yes, I intend to include TU in my will

Maybe, tell me more...

I have already included TU in my plans

Please do not contact me about this again



Dear Ashley,

Whether inspired by fishing, conservation, or both, many TU members have left money to TU in their will, helping ensure the health and integrity of our coldwater habitats for generations to come.

No matter where you are in your planning process, we offer a range of resources to make it easy.

Where are you in your will planning process?

It is not on my radar

I will starting planning my will soon.

I am already working with an attorney.

Completed, and I included TU in my will.

Completed, and I did not include TU in my will.

Please do not contact me about this again.



Ashley,

Six months ago, you told us estate planning is not on your radar, so I wanted to check in again to see if anything has changed.

If you're ready, TU can offer helpful resources, such as a list of local estate planning attorneys or sample language for your will. Please know we're here to support you at any stage of your estate planning process. Just let me know how we can assist.

Has your estate planning status changed?

Yes, I am ready to start planning.

No, I am still not ready to act.



Ashley,

It's been three months since you told me you were starting your estate planning process soon, so I wanted to check in.

If you have started the process, TU can offer resources to make it easier, such as a list of local estate planning attorneys or sample language for your will. And if not, that's ok, too! Just let us know, as we're here to support you at any stage of your estate planning process.

Have you started your estate planning process?

Yes!

No, but please check back later.

I am not considering adding Trout Unlimited to my will.

FUNDRAISING

GCSAA Rounds 4 Research Auction



Rounds Research
GCSAA

APRIL 22-28, 2024

BID ON ROUNDS at 1000+ courses from around the country to gems in your backyard.

ROUNDS4RESEARCH.COM

R4R is presented in partnership with **The Toro Company.**

TORO

Support your organization and help foster sustainability.

Hi Megan,
Now's your chance to play bucket-list courses and hidden gems in your backyard. Bid now on rounds at over 1,000 courses. Winning bidders get a great round of golf with proceeds supporting research, education, and innovation for the future of the game. It's a win-win for you and the game of golf!

Are you ready to place your bids?

Oh yeah!

Hm, let me take a look...

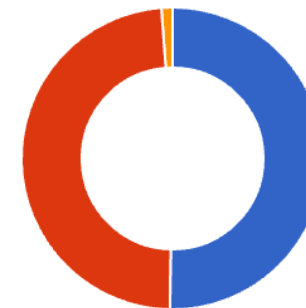
Not this year.



☰ Are you ready to place your bids?

1088

Answers



● 50% - Hm, let me take a look...

● 49% - Oh yeah!

● 1% - Not this year.

FUNDRAISING

GCSAA Rounds 4 Research Donation

Hi Megan,

Donating a round of golf through **Rounds 4 Research** is more than just a generous act; it's a powerful contribution to the future of golf. The R4R program is addressing a critical shortage of funding for ongoing, university-based agronomic research, education, advocacy programs and course operations. You can help foster sustainability with a donation or by bidding on rounds during the online auction.

Would you like to donate a round for research?

Yes

No

- Generated donations from 70+ people
- 97% of respondents said Yes
- 3% engagement rate

If Question Answered matches Selection = Yes

Then Redirect to URL - <https://www.gcsaa.org/foundation/rounds-4-research/r4r-online-donation-form>

and Send Email

If Question Answered matches Selection = Yes

Then Redirect to URL - <https://www.gcsaa.org/foundation/rounds-4-research/r4r-online-donation-form>

Fires	84
andSend Email	
Fires	77
Opens	98
Total Clicks	22
https://www.gcsaa.org/foundation/rounds-4-r...	22



POP IN CHAT OR UNMUTE:

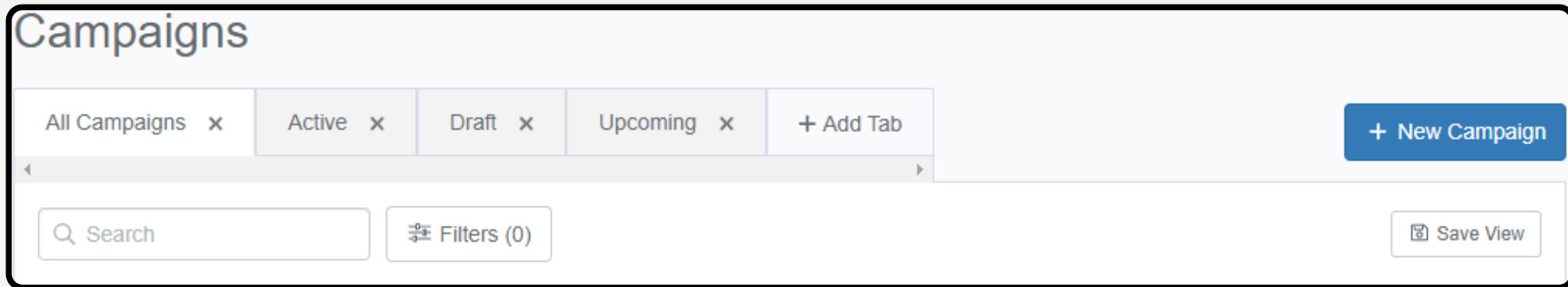
What new ideas could help you with your business and fund development efforts?



New Features: Campaign Tabs

Campaign tabs to organize your campaigns and stay focused!

- Default tabs: Active, Draft, Upcoming
- Private or public
- Easier to create and add tags





New Features: Detailed Insights

2024 Renewal Campaign (April 2024- March 2025)

2580	256	10%
Asked	Answered	Response Rate
Question	Answers	Insights
Do you plan to renew your membership?	148	Insights
Would you like to renew your membership now?	52	Insights
Did you know your membership is about to expire?	29	Insights

View Full Campaign History