

Naz Sadati: Lovely and hello and welcome to everyone who is joining us today. And everyone who is watching this back at a later date.

Naz Sadati: Today we're going to be exploring our new campaign dashboard, which is full of new updates and data to help you maximize your online campaigns. So we have lots to get through. It's lovely to have you all on the call, please. If you haven't already say hello in the chat, introduce yourselves. Let us know which organizations you're joining us from.

Naz Sadati: But, as I said, we have lots to take you through today. So let's start with our agenda.

Naz Sadati: Okay, so first, we're going to start off with some introductions. So I have met. I think most of you on this call today, but for anyone who I haven't met before, I'll just be introducing myself. We'll then go through 2 different campaign types which

Naz Sadati: you can create and manage on social sync. And we'll be going through these because it will impact kind of data that's going to be available to you.

Naz Sadati: We'll then demo our new campaign dashboards, and then we've got a very exciting guest speaker joining us today. So that is Harriet Brass, our Social mind campaign manager.

Naz Sadati: So Harriet will be taking you all through some of her advice. Some of her top tips for how you can use that available data to better inform your strategies.

Naz Sadati: and then we'll finish up with what's coming up next for social Sync, and some next steps that you can take as well as some time at the end for any final questions that you have

Naz Sadati: so hopefully. That sounds good to you all. So we'll start off just with an introduction. For anyone who I haven't met before. I am Naz. I am the support manager at social sync. And my role is to support all of our platform users, helping them to get the most out of our tools

Naz Sadati: and to also help you maximize multi-channel fundraising for all of your campaigns.

Naz Sadati: Before I joined social sync, I was a digital marketing and communications coach specifically within the nonprofit sector. So I worked with thousands of different charities all over the world, helping them to amplify their message online and attract attention during key online campaign moments.

Naz Sadati: I've also spent several years working directly within the nonprofit sector, myself

Naz Sadati: specifically within fundraising where I gained my diploma in fundraising. And I really am passionate about this sector.

Naz Sadati: So when I'm not working, I am a human rights advocate and campaigner. I use social media as my tool for change, and I work with lots of different celebrities and people in the public eye to really encourage more and more people to get involved in human rights advocacy.

Naz Sadati: So that is just a little bit about me. But enough of that. We'll dive into our campaign

dashboards now.

Naz Sadati: and let's 1st ask the question of

Naz Sadati: why should you use social sync to create and manage your online fundraising campaigns. What makes it really stand out

Naz Sadati: well, social sync is unique because it doesn't lock you into a single platform.

Naz Sadati: Unlike other tools that focus on just one fundraising channel social sync brings everything together.

Naz Sadati: So you can integrate platforms like just giving gofundme Facebook fundraising and also your own branded fundraising pages, all in one place with the pro account.

Naz Sadati: and this means that your supporters aren't limited in how they raise money so they can fundraise in a way that works best for them and their donors, whilst you keep that full visibility over all of the activity.

Naz Sadati: And this multi-channel approach really does matter. We've seen time and time again that those charities who offer multiple ways to fundraise do bring in more donations.

Naz Sadati: Some supporters prefer just giving. Other supporters might be more engaged on Facebook or want to set up a Gofundme page. So with social sync, you don't have to choose just one platform. You can use them all together and reach that much wider audience.

Naz Sadati: And it's important to emphasize as well that this multi-channel approach is only available with the pro account. Those using the free account of social sync will be limited to Facebook campaigns only. So actually, now would be a good time for me to ask those of you who are online, who is using the pro account and who's using a free account. So I'm just going to launch a quick poll

Naz Sadati: asking that question.

Naz Sadati: And if you could vote in that poll, that would be lovely.

Naz Sadati: amazing. I could see those votes coming in, and I can see most of you are on the pro account, and there are some free platform users as well, and also some people who haven't created an account just yet. So maybe are just curious as to what is available out there.

Naz Sadati: So thank you for voting in that. I will leave that open just for any final votes that are coming in.

Naz Sadati: But another huge benefit of social sync is also automation.

Naz Sadati: Now, stewardship is really crucial. It's a crucial part of any fundraising campaign, but manually sending emails, manually sending those reminders and those updates can be really time

consuming. Now with social sync, you can set up those fully automated and also most importantly personalized supported journeys.

Naz Sadati: So you can make sure that your fundraisers are receiving the right messages that are tailored to them. So whether it's a welcome email fundraising milestone celebration, or whether it's that final push to hit their fundraising target.

Naz Sadati: So this helps you to build those stronger relationships with your fundraisers helps also to keep them engaged, and ultimately it leads to more funds raised. And you can do this with Rule Builder, which is available to all of our platform users and also pathway builder.

Naz Sadati: which is available to pro accounts. And if you do want to find out more, we did have a webinar on pathway builder last month, so I will send a link out to everyone who has attended today with with the link to that recording. In case you do want to catch up.

Naz Sadati: And because we know that charities don't always have the time or the resources to spend hours setting up, you know, complex campaigns.

Naz Sadati: you know, launching, launching a campaign has so many steps already within within it, so launching a campaign on social sync,

Naz Sadati: kind of reduces that and makes it, it turns it into a much more simple process, and you can get started very quickly. You can set up your fundraising pages. You can create those automated supported journeys. And really, just a few clicks. You don't need to have that tech expertise.

Naz Sadati: And finally, data. Now, data is key, which is why we're here today, and we give you that full visibility over your fundraising and campaign performance.

Naz Sadati: With that real time tracking and reporting.

Naz Sadati: you can see exactly how much has been raised, you can see which fundraising channels are performing best and most importantly, how engaged your your audience is.

Naz Sadati: and this means that you can make those informed decisions. You can refine your approach and really continuously improve your campaigns for better results based on actual data.

Naz Sadati: But before we look at any of that data and those campaign dashboards. I also just want to understand how confident you will feel about how exactly

Naz Sadati: how confident you feel about where to go to find that data on social sync, or how confident you feel in actually understanding the data that's on there.

Naz Sadati: So I'll launch another poll to ask that question.

Naz Sadati: Here we go. That should have all that should have popped up for popped up for all of you.

Naz Sadati: So this is just asking, how confident do you feel in understanding the data that's available to you. So whether that's understanding what it means or understanding where to go to find it.

Naz Sadati: And there really isn't a right or wrong answer. Here, we're not expecting everyone to be level 5, feeling super confident. That's exactly why we're running this webinar today. We want to help you feel more confident. So do be honest.

Naz Sadati: amazing. Thank you for voting in that.

Naz Sadati: And excitingly, we. We do have lots of campaign data available to you with these new campaign dashboards

Naz Sadati: which we're going to be sharing with you today.

Naz Sadati: So really, in short, social sync makes online fundraising more connected

Naz Sadati: more automated, more effective, and also more data driven.

Naz Sadati: It saves, saves you. Time

Naz Sadati: increases your reach and helps you raise more funds. And that's why so many charities are using it to power their campaigns.

Naz Sadati: So now that we've covered, why, social sync is such a powerful tool for managing your fundraising campaigns. Let's look at how campaigns actually work within the platform.

Naz Sadati: Now, when you're running a fundraising campaign through social sync, you have 2 types of campaigns, you have social sync campaigns, and then you have organic campaigns or organic fundraisers, and each has its own purpose and understanding. The difference between them will really help you to get most out of the platform.

Naz Sadati: So let's start with social sync campaigns.

Naz Sadati: Now, these are the campaigns that you create directly within the platform using our built-in campaign wizard.

Naz Sadati: And this means that you have full control over the setup over the structure and branding of your campaign.

Naz Sadati: With these campaigns

Naz Sadati: you can create registration forms. You can create merchandise forms, or really any other kind of form, for that matter, and you can link them directly to your campaign. So whether you're managing a virtual event or a challenge fundraiser.

Naz Sadati: We make it really easy for you to collect and track that key supported data, or maybe that

order and merchandise data

Naz Sadati: on the data side, we allow you to pull in fundraising data from any of your chosen fundraising platforms. You can do that manually, or you have. Or if you do have the pro account, you can do that via automated Api nightly imports

Naz Sadati: in an automated nightly import. You won't need to take any steps. Unlike the manual import, the only thing you need to do is switch the feature on.

Naz Sadati: It's all taken care for you. Now, if you need any support in knowing how to do this. Maybe if you have the pro account at the moment, but you're not sure how to switch on those automated imports, then you can just pop me an email. And I'd be more than happy to set up a quick 15 min call to show you exactly how

Naz Sadati: and because these campaigns are built within social sync, you can track their performance in detail. So everything from total funds raised to supporter engagement.

Naz Sadati: and the best part is that everything is fully editable. So if you need to update your campaign details, you need to change messaging. Or maybe you need to tweak a form. You have that complete flexibility.

Naz Sadati: On the other hand, we have organic campaigns, and these are campaigns or fundraisers that are created outside of social sync. So, for example, when a supporter sets up a Facebook birthday fundraiser, or maybe they create a personal Gofundme page.

Naz Sadati: Since these fundraisers and these campaigns aren't created within social Sync. They can't be edited within the platform, but you can still track their performance.

Naz Sadati: And just like with social sync campaigns, you can pull data from these fundraisers into the platform for you to manage either manually or again, through that automatic Api nightly import.

Naz Sadati: The key difference between social sync and organic campaigns. Here is really how the data is tracked. Instead of campaign specific reporting, which we see with social sync campaigns when it comes to organic campaigns.

Naz Sadati: social sync provides more kind of platform specific data. So rather than viewing data, maybe for a single campaign, you'll see insights across all organic fundraisers on a given platform. So whether it's just giving or gofundme.

Naz Sadati: And this is really great, especially for understanding trends like, how well organic just giving fundraisers are performing for your charity overall

Naz Sadati: organic Facebook fundraisers are the exception here because we are actually able to differentiate between birthday fundraisers, generic fundraisers created possibly through the charity's own page, or whether it's been created through the charity's Facebook post. So you can break down that organic data a little further for Meta.

Naz Sadati: So in short, social sync, really gives you that flexibility to run both structured in platform campaigns

Naz Sadati: and also track external supporter led fundraisers, and the best part is that everything feeds into your campaign dashboard, where you can easily track fundraising, performance and audience engagement all in one place.

Naz Sadati: Now, one of the biggest advantages of using social sync is that you get a full picture of your campaign performance. As I said, all in one place, so on the screen are just some of the key data points that you can track. So we have campaign funnel. So this will allow you to track the journey your supporters are taking within your campaign from signing up to actively fundraising.

Naz Sadati: We have their activity. So you can keep an eye on fundraiser engagement, such as when they update their mileage on a challenge activity. You can view order history so that you can stay on top of merchandise requests.

Naz Sadati: You can view individual donations through the transaction page. You can view purchases helping you really to understand the giving patterns and the giving trends of not just your supporters, but also their donors.

Naz Sadati: And there are lots more metrics, as I said, some of which you can see on the screen, and we'll go through these in more detail in the next slide.

Naz Sadati: so you can get a really clear real time overview of your campaign for performance at any point in time.

Naz Sadati: So this makes it really easy to track what's working.

Naz Sadati: It makes it easier for you to spot trends

Naz Sadati: and make those data-driven decisions to improve your fundraising strategy.

Naz Sadati: So with that in mind, let's take a look at how it Works

Naz Sadati: and Motor Neuron Disease Association have actually very kindly given us permission to share their campaign dashboard for their recent run. 31 campaign. So a big thank you to Mnda for consenting to that.

Naz Sadati: What I'll do now is I'll just pull up their campaign dashboard so that we can take a look

Naz Sadati: at how this appears

Naz Sadati: lovely.

Naz Sadati: So

Naz Sadati: when you log onto the platform, you will have the option to select which campaign you want to focus on. So once we've selected the campaign we want to focus on. In this case, it's the run 31 miles in January campaign. You are brought to a page that looks like this. So this is our overview page.

Naz Sadati: Your overview page will always have some running stats at the top, and these are your totals. So

Naz Sadati: this is going to be your total revenue, your total amount in gift age, and it will also show you what percentage of your fundraising target you have met.

Naz Sadati: It will also show you the average amount raised per active fundraiser.

Naz Sadati: And also the average donation.

Naz Sadati: We also have activation rates. Now, activation rates is going to show you the percentage of fundraising pages that are active. So they have received at least one donation.

Naz Sadati: And we also have that again broken down in percentage and figures, and then we have some totals, some audience totals. So we have our audience value at the top. Now, your audience will always consist of the number of leads you have. So whether you've integrated your Facebook leads form.

Naz Sadati: it will pull through to your audience, so it will include your leads as well as your registrants.

Naz Sadati: We also have the number of registrations. So, in fact, we can probably calculate the number of leads

Naz Sadati: by just seeing the difference between these 2 values.

Naz Sadati: And then we have the number of fundraisers that are created, and the number of fundraisers will always either exactly match or be very similar to the number of registrations that we have.

Naz Sadati: So they are our running totals. They will always remain at the top of your overview page.

Naz Sadati: However, just below that, we have a graph.

Naz Sadati: And in fact, we have multiple graphs. Now, when you come to view your own graph, you'll most likely 1st land on your revenue page.

Naz Sadati: If you land on an event page, that's because you have a multi events campaign. So it's breaking down the performance of the 2 different camp of the 2 different events that you have.

Naz Sadati: So, just for the sake of time.

Naz Sadati: we'll start on the revenue page and the revenue page

Naz Sadati: at the top. You will always have your filters. And, in fact, this is the case for all of these

pages. You will always have your filters so you can filter your data based on platform.

Naz Sadati: And you can also view your data either daily or cumulatively.

Naz Sadati: And then, again, if you have a multi event campaign, you will also be able to filter for event.

Naz Sadati: You also have some custom date ranges here, so you can change the date in which you view your data, for

Naz Sadati: I will leave it as this date for now. So this will be the start of the campaign, and this will be today's date.

Naz Sadati: But as soon as you change the state, you will see that your graph will also change to reflect that, as well as the totals raised on the right hand side.

Naz Sadati: and if you hover over any of these days you will be able to see the total amount raised on each of those platforms on that specific date.

Naz Sadati: So it really breaks down your fundraising data for you. And this graph also helps you to identify any trends. So we can see on the 1st of January.

Naz Sadati: for very obvious reasons. It's very often very popular day for fundraising. We have a big spike in donations, and we also see that on the 31st of January.

Naz Sadati: You can also based on the trends that you're seeing. You can also take a look at the different communications that are going out around those high performing days. And you can link your communications to the performance that you're seeing. And you can identify specific emails that might be really resonating with your audience and driving that conversion.

Naz Sadati: So this is our revenue page. It will show you our fundraising totals.

Naz Sadati: We then have our funnel.

Naz Sadati: Now our funnel is going to show you really the journey that your audience is taking throughout your campaign, and it will show you how they move from being a simple audience member all the way through to being an active fundraiser.

Naz Sadati: So, for example, if I hover over any of these days, for example, we've got here for the 14th of December. We can, we can see on that date that we had 318 new audience members

Naz Sadati: joining our campaign, a hundred 24124 of those were new registrations. So again, by simply just subtracting those numbers, we can tell how many of those were leads.

Naz Sadati: We can see that 124 fundraisers were created. And that's going to be because each registration has created a fundraiser and 26 of those people.

Naz Sadati: 26 of those audience members of those registrations activated their fundraiser. So they received their 1st donation on the 14th of December.

Naz Sadati: So, again, another really great opportunity to try and identify any trends by looking at this

Naz Sadati: one that really stood out to me is again on the first.st

Naz Sadati: Actually, from the 1st we can see a really huge spike in active fundraisers. And actually here we can see on the 3rd of January

Naz Sadati: the number of active fundraisers. So the number of people activating their fundraising pages actually exceeds the number of new audience members coming in. So again, it might be a really good idea at this point to take a look at what communications are being sent and what's really driving that conversion.

Naz Sadati: And again, we can filter for specific segments.

Naz Sadati: for daily or cumulative data and the specific events that we have running.

Naz Sadati: Next, we have our pages. So this is going to show you the number of fundraising pages that are be are being created each day.

Naz Sadati: So this will help you to identify what the most popular fundraising platform really is for your audience. And we can see just by looking at the data that Facebook and social sync fundraisers are the most popular within this campaign.

Naz Sadati: Again, you can filter that data. You can just view your totals. So the total number of fundraisers that you are creating.

Naz Sadati: Nope, or you can remove that. And you can just take a look at the platforms.

Naz Sadati: Next, we have activation. So this is going to be the number of fundraising pages. So we're moving away from what we saw at the funnel which focuses on the individual level. So the number of people who are activating their fundraising page and the activation tab shows you the number of fundraising pages. So now we're moving on to kind of a page level of viewing that data.

Naz Sadati: And how many of those are receiving their 1st donation?

Naz Sadati: And again, another really great opportunity for you to hover over this data and notice any trends.

Naz Sadati: And finally, we have our activity page.

Naz Sadati: Now, our activity page is going to be limited to one single platform. And that's the social sync fundraising pages. And that's because our social sync fundraising pages are the pages that will allow you to log your activity. So if you're running a challenge, a run, a walk.

Naz Sadati: your supporters can go into their social sync fundraisers and log in the amount of mileage that they're doing. And this graph is going to show you on which days.

Naz Sadati: your audience are most active, and how many miles are being logged in total

Naz Sadati: now, because the supporter tab, that's your overview page.

Naz Sadati: So if you take a look here, that's our overview page.

Naz Sadati: But we also have the supporters page here

Naz Sadati: now, because the supporter tab contains personal information includes name, address, etcetera. We won't be able to show you this page live, but I'll go through what that page shows. Just through screen grabs.

Naz Sadati: And it's fairly self explanatory. The supporter page shows you all of the information you might want to collect about your supporters, and some of the data

Naz Sadati: takes what you have seen in the overview and really drills down into it.

Naz Sadati: Now, at the top of your dashboard again.

Naz Sadati: you will see some key fixed data points.

Naz Sadati: and that will include your audience size. So again, the total number of leads and registrants. In your campaign. We have the number of registrations.

Naz Sadati: and that's shown as both a total number and percentage.

Naz Sadati: We have the number of fundraisers again broken down by number and percentage and the number of active fundraisers. So again, showing how many fundraisers are currently raising money.

Naz Sadati: Now, this is a top level view. It gives you that quick snapshot of how your campaign's performing. But if you want to dig deeper into individual supporter data, you'll find it broken down into key into 3 key tabs just below. So we have our audience tab.

Naz Sadati: Now the audience tab, which we can see here.

Naz Sadati: This gives you a high, level view of all of your supporters.

Naz Sadati: so you can see their names. You can see the platforms that they've consented to receive campaign communications on.

Naz Sadati: So this helps you to understand where they are engaging with your campaign

Naz Sadati: when their registration was created. Whether it's still open or maybe it's been cancelled.

Naz Sadati: You can also see their supporter segment. So whether they're a lead or a registrant or an active fundraiser, and also the total amount they've raised so far. So

Naz Sadati: this is just a great way to get an overview of who your supporters are.

Naz Sadati: Now, if you want to zoom in on a specific supporter, you can then click on any audience, registrant or fundraiser record to open that individual record, Modal. And this gives you a detailed breakdown of their engagement and fundraising activity.

Naz Sadati: Nope, now, in the record modal, you'll find personal details. So email phone number address.

Naz Sadati: fundraising performance. And that's a platform by platform breakdown of how much they've raised across justgiving Gofundme Facebook, that branded fundraising pages depending on which platforms you've enabled.

Naz Sadati: You'll also find the supporters transaction history, and that will include every individual donation that they've received.

Naz Sadati: You'll also see any tags apply to the supporter. You'll see their registration details.

Naz Sadati: activity, details. So again, if you're running an activity based challenge like a run. You can see data such as the mileage covered, you can see which forms they have completed. So whether it's a registration, a merchandise form that they filled out, and you can also see any orders that they have requested.

Naz Sadati: Now let's go back to the campaign dashboard, and let's take a look at the registration tab.

Naz Sadati: Now, this tab shows which fundraising platforms your supporters.

Naz Sadati: your supporters, are using that are linked to this campaign. So it might be social sync Facebook, whether their fundraising pages are still active or whether they've been cancelled.

Naz Sadati: how much they've raised in total, and also the number of donations that they have received

Naz Sadati: this tab is particularly useful. For tracking fundraiser activity for a specific individual.

Naz Sadati: And then we have the fundraiser tab, and this is great for a detailed breakdown of fundraising performance, not per individual, but per page, because every individual, every registrant, can have multiple fundraising pages.

Naz Sadati: So in this tab you can access fundraising totals split by platform for each supporter. So you can see which platforms are driving the most donations. You can also track campaign tags. That's if you've applied them. So this helps you to track different audience segments.

Naz Sadati: And this tab can help you to track any fundraising trends and really help you to refine kind of your campaign strategy based on that real time data.

Naz Sadati: Now, everything I have shown you so far is how you would track your data for social sync campaigns.

Naz Sadati: But what if you have organic fundraisers coming in? And you want to understand the performance of those?

Naz Sadati: Well, the data you can access is fairly similar. It's just accessed differently on a different page, and all you need to do is just head back to your campaign page.

Naz Sadati: and at the top you will notice there is an icon for every every platform that you can integrate with.

Naz Sadati: So to find all of your organic Facebook data, you would simply click on the Facebook tab

Naz Sadati: for your justgiving data. You click on the justgiving tab and so on.

Naz Sadati: Now, since we're not pulling through supporter data via a registration form in this case. Because, remember, organic campaign originates outside of social sync. So it's not coming through through our registration forms.

Naz Sadati: And because of this, the amount of data that we can pull through is limited to what that platform will provide us with. So, for example, if you click on an organic justgiving record model. You'll notice that name and email address are really the only pieces of personal information that justgiving provide.

Naz Sadati: however, to have any of that organic data on your account. You will need to set up an automated nightly Api import. That's if you're on the pro account, or if you're on the free plan. You'll need to run regular manual imports.

Naz Sadati: And again, if you're not sure how to do that, do just reach out to us, because I am more than happy to support any of you.

Naz Sadati: So with all of these insights in your dashboard, you can really easily track who's engaging, who's fundraising how they're performing across those different platforms. You know whether you're looking for those high level trends, or whether you need to deep dive into your data on an individual basis individual supporters. You have access to all of the tools that you need to optimize your campaign strategy.

Naz Sadati: And with all of that in mind.

Naz Sadati: I am really pleased to introduce you to our Social mind campaign manager.

Naz Sadati: Harriet Brass, who is going to share some of her tips and advice on how she uses the campaign dashboard, and also how you can make the most out of this data to help inform your strategy. And as I hand over to you, Harriet, I'm also just going to go through the chat and see if there's any questions that I can help with or get back to. So please feel free to ask any of them in the chat.

Harriet Brass: Thank you very much. Naz. Yes, I'm Harriet. I am the campaign manager at social mind. So we are the agency that works alongside social sync. My background, just for a little bit of context, is events fundraising as well. So I started out a long time ago in international challenge recruitment. And then, obviously, Covid hit had to have a little bit of a change of direction and moved into that virtual event space

Harriet Brass: which led me to do an apprenticeship in digital marketing, which was, yeah, really exciting and really kickstarted a passion for these virtual products.

Harriet Brass: And before that, my degree is in human geography and masters in international relations. So I'm really driven by what

Harriet Brass: leads people to behave in certain ways and actions that they take from different things. So again. I think that fits very well into working on these campaigns and social sync dashboards have really given us a great way to get insight into our campaigns and how we can use those behaviors to optimize. So if we go to the next slide, please, Naz, thank you. So I just wanted to give a top overview of how we use the platform here at social mind. So

Harriet Brass: it is threefold, and a lot of this will touch on what Nas has been talking through, but initially we use it to set up campaigns and registration. So that includes the creation of the campaign and designing registration forms. And then we build our behavioral journeys for email and SMS within pathway builder and then also testing and reporting back to our clients. So we leverage multiple functionalities within social sync to test, analyze.

Harriet Brass: and optimize campaign performance. And I'm going to go into each of those in a little bit more detail and apologize in advance for how many times I use the word optimize during these slides.

Harriet Brass: And so if we can go to the next one, please, Naz, thank you. So yeah, we utilize the multi event campaign settings within social sync as Naz spoke about before, and that allows us to test different executions so that can include things like Tiktok, Instagram, Facebook, and lots of different avenues for acquisition.

Harriet Brass: We also trial multiple fundraising platforms. So we are advocates for multi platform fundraising. And that means we can compare performance and supporter engagement on different channels. We also experiment with different registration methods. So within social sync, you can have different forms, and you have complete flexibility over how that is structured and what that looks like.

Harriet Brass: And that means we can test variation in form structure, too. And we also create multiple events to quickly analyze performance and refine our strategies as well.

Harriet Brass: So by using those dashboards that Nas has taken us through, we can see the impact of our campaigns at the click of a button. I also noticed that since I took these screen grabs there has been another update to dashboards of how they look. So this is the same data just

Harriet Brass: previous iteration of it. But these dashboards give us those key metrics. So I've just pulled the example here of form submission rates. So that's the graph at the bottom there. So each of those

different colors are different forms that we've set up. So it might be ones that drive registration through emails, through SMS, through group, through Facebook messenger. And we're able to see what's driving the highest. So actually, that

Harriet Brass: top pink line is group submissions. And then alongside that we can track revenue. So that's what that top top graph is

Harriet Brass: with that top line being Facebook income. So we can see that for this campaign

Harriet Brass: the highest driver was in the Facebook group. And that's directly correlating to income coming through Facebook as well. So that allows us to

Harriet Brass: either change our registration strategy, or kind of lean into it a little bit more. And that allows us to refine strategy on live campaigns and also future campaigns.

Harriet Brass: And then, if we go to the next slide, please thank you. We then, as I say, also build our journeys within social sync. So using pathway builder. So we build leads pathways to and utilize that form integration with Facebook leads to build journeys that then lead to registration, conversion. And then we build our registrant pathways

Harriet Brass: so that can be anything from sending registration, confirmation, sharing personal fundraising page links and delivering key cause messaging for the charities that we work with.

Harriet Brass: We then use the behavioral triggered communications, and so that can be anything from 1st donation activity, logged, active versus inactive participant engagement amount raised.

Harriet Brass: And then time communications, such as an email about 1 week to go or a launch day, SMS, lots of different functionality there. And these screen grabs here are just from pathway builder, and I could have put so many examples in here. So I really had to narrow myself down. But

Harriet Brass: this is how we can easily set up flows to split participant journeys. So the one on the far right that's an example of how we've split journeys based on. If people set up a Facebook fundraiser or just giving fundraiser and delivered those alongside each other, and we can see side by side performance there.

Harriet Brass: It allows us to tailor pathway builder allows us to tailor those communications and engagement strategies accordingly, and by segment segmenting those journeys. Sorry we can really personalize the experience for the fundraiser on each platform.

Harriet Brass: and

Harriet Brass: I just want to note there as well touch on the fact that these are tagged. So the little node just above the email send we tag them when they come in. So we can say that they're going down this pathway or this path, and that allows us to come back later and really see the the value of those journeys.

Harriet Brass: And then that second screen grab just in the middle of the screen. That is just an example

of how we set up triggered communications. So in this example, it's an email that's triggered when someone has logged 80 kilometers of a 90 kilometer challenge. So this approach allowed us to kind of increase their targets, encourage them to go a little bit further with their challenge and stay engaged throughout the month long challenge, and by providing those timely prompts we can

Harriet Brass: boost motivation and maintain momentum among participants, kind of, regardless of how long they're on board with us.

Harriet Brass: Cool and then moving on to the next bit. Insights in driving optimization. So again, this is gonna loop background quite nicely to what Nas has been taking us through this morning already. But we use social sync for enhanced performance review. So as we've seen on the

Harriet Brass: kind of overview of the dashboards, we can see a full funnel overview to identify pain points and analyse these, to assess their impact. And that can be on anything like metrics, such as fundraiser activation or income spikes. And that allows us to strike a balance on campaigns. So

Harriet Brass: our activity and supportive behavior should be informing each other constantly. And that's where we can find those optimal results. So we can do that in social sync, I guess previously using multiple platforms, you can dive into it. But it did make it a lot of manual investigation, whereas this is, we can really quickly identify those

Harriet Brass: and the support dashboards enable us to do a quick review of what's working and facilitating those data driven adjustments. And then we can leverage that support behavior as well. So we can adapt our activity based on registrant actions, and engagement patterns as well.

Harriet Brass: So by having that full funnel overview. As I say, we are able to see

Harriet Brass: the campaign from lead generation through to conversion activation, average value, and that comprehensive view allows us to identify potential blockers. And again, what's working well and want to have that positive spin on it as well. And we can delve into those different levels of evaluation as well. So as I say, that second screen grab there is of activation. And we can analyze which challenge is

Harriet Brass: which challenge or what channels within that are driving the most engagement, and that ultimately helps us to determine where we're going to yield the highest average value of fundraisers. And I think the aim is always to provide exceptional journeys to each fundraiser who comes through and make that as personalised as possible, and we're able to do that

Harriet Brass: by having this data at the tip of our fingers.

Harriet Brass: If we can go on to the next slide, please. Thank you. So what do we love about working with social sync as a platform again. Had to really narrow myself down here to make sure I didn't take up all of your days with telling you what we love, but initiates that access to real time data. And we can make data led decisions to optimize campaigns at the right time and also give us benchmarks across our campaigns as well.

Harriet Brass: We are able to scale behavioral and personalized support journeys ensuring the supporter

feels seen and valued, and that they're not just another person in this challenge. And then we can really lean into that test and learn approach. We are continuously evolving to maximise fundraising impact. And that's the aim

Harriet Brass: the integrated campaigns and pathway builder allows us to do simple A B testing. Again, measure the impact of that really quickly. The real time data provides instant insights for reporting and improvement and regular performance reporting to clients. It ensures transparency. It holds us to account, and it also means that we can make recommendations to them for how we can make the most of that campaign really quickly.

Harriet Brass: And

Harriet Brass: and yeah, I've just popped at the bottom. Here we've got. We've we've managed to since working on social sync, have so many benchmarks, the campaigns that we work on, and we can build that not only across virtual products, but specifically for clients as well. Of what works for them and their audience. And we can roll that across events.

Harriet Brass: And we're now able to forecast extensively and benchmark in key areas, including these email insights, for example, but also average value registration and group conversion. It's kind of endless. And we're still uncovering all the different functionalities that we can have before the implementation of dashboards.

Harriet Brass: As I say, analyzing data from different areas required significant manual effort. And I think, having worked in charities, we all know what that looks like trying to get to the bottom of our numbers and performance. But now, with those dashboards, it's really refined, that process providing us with a holistic campaign overview, but also a deeper understanding of our audiences, and that efficiency allows us to make really informed decisions and enhance our overall strategy.

Harriet Brass: Lovely next one

Harriet Brass: great. And then I'm just going to wrap up my section with our kind of top tips of what we've learned whilst using social sync to deliver our campaigns. So I touched on it very briefly. But tagging, I think it's 1 of

Harriet Brass: the greatest elements within social sync, because we can really follow our audiences and their behavior. So I would tag your audiences and segments. So that enables data segmentation to compare key metrics. Like, we say, like activation rates, average donation based on the supporter journey that they've received as well. So you can really see when you're

Harriet Brass: you're doing something if it's having impact, and if it's not, then don't drive any more time into that. And similarly tagging A B split tests. If you're going to do a 50 50 split test or deliver a journey where Facebook's the lead or just giving is the lead tag those so we can. You can then come background and see clear comparison of key metrics to measure

Harriet Brass: the impact of different test variations as well.

Harriet Brass: And then, just on dashboards, I think, get clued up on them. There's a lot of data to digest, appreciate that. But the team at social sync have made it as simple as possible for you to be able to see what you need to straight away, and you can easily track those key actions and results in real time, let's say, and to optimize your performance and maximize your impact. So yeah, those dashboards appreciate. There's a lot there. But it's really useful information and something that we've been

Harriet Brass: pushing for within charities to be able to see that nice and clearly. So yeah, just make the most of it. I think that's my final slide, Nance.

Naz Sadati: Amazing. I will hand back to you. Thank you very much.

Naz Sadati: Thanks so much, Harry. And I definitely agree with these topics, especially with the tags. I think they're the most underrated tool that we have. I wish more and more people use them because they are so helpful in segmenting your audience.

Naz Sadati: and I don't actually think I showed this in my screenshots. But you do when you go to take a look at your supported data here, whether it's your audience, your registration or fundraiser data. You do have the option to filter. And this is where you have the option to filter your data

Naz Sadati: and view everyone that has had those tags that you have added within pathway builder. So you do have the option to, you know, as Harriet said clearly, see those comparisons. So

Naz Sadati: yeah, if you've not made use of that tool yet, then please do right before we finish.

Naz Sadati: Let's take a quick look at what's coming up. And I'm also going to launch a final poll as well. Just to ask how you're now feeling about the data that's on social Sync, and also how useful you found this session. So let me launch that first.st

Naz Sadati: There we go.

Naz Sadati: So please do vote whilst we do go through these final slides.

Naz Sadati: So first, st we have what's coming up. So we have lots of new things coming up in 2025 for you all. And the 1st that I want to talk about is email templates. Now, you might have noticed our announcement on LinkedIn and also on the platform last week that we are introducing email templates.

Naz Sadati: This is really exciting, because the feature is going to allow you to create your own branded email templates which will help you to save time, because you can then reuse those pre-built email templates across different campaigns.

Naz Sadati: it will also help you to maintain consistency across those different touch points. And also something we all want to do in work which is reduce admin. So you can create those templates, and you won't need to worry about coming back and doing them again later on.

Naz Sadati: So once that has been released, you will be informed. So do keep an eye out on your emails. Keep an eye out on the platform. It will be released very shortly.

Naz Sadati: We also have Whatsapp communications coming very soon, which you might have heard me talk about in our previous in our previous webinar, and this will allow you to target your audience on Whatsapp, which is, as we know, one of the most popular communication platforms out there. So a really huge opportunity there for charities.

Naz Sadati: And then we also have our next social sync workshop, which is going to be on the 26th of March, and details and links will be sent to you once that has been confirmed and finalized.

Naz Sadati: So your next steps after today's session are to register for that next webinar. Once the registration link has been sent out. If you want to revisit anything from today's session, I know we had lots in here to share with you. Then a recording of the webinar will be sent straight to your email so that you can catch up.

Naz Sadati: I also recommend you share it with any colleagues who might be interested in learning more about the platform, and for those of you who are interested in learning more about using social sync, or are interested in upgrading your account to make full use out of the tools and resources we've shared with you today, such as those automated imports, such as pathway builder.

Naz Sadati: and also lots of other really amazing tools. Then please do reach out to Marissa, our head of growth, using the email address on the screen, and I'll also pop it in the chat for you all.

Naz Sadati: and also, if you need any support on the platform. If you need any guidance around those imports around anything that we've gone through today or anything else. Then please do reach out to me. I am Nas, your support manager. So please do reach out at any time with any questions, and I'm always more than happy to help where I can.

Naz Sadati: so

Naz Sadati: we'll pause there enough talking from me, and we'll just see if in the final few minutes anyone has any final questions. Please do feel free to share them in the chat or come off mute.

Naz Sadati: Please do feel free to ask away now.

Naz Sadati: No worries, if not, if you do think of anything afterwards. You have my email address in the chat. Please do reach out

Naz Sadati: but yeah, if there aren't any final questions I'll let you all go. It was lovely to have you all on the call. I hope you found it helpful, and we will see you next month.

Naz Sadati: Take care, everyone bye.