



# THANKVIEW

SAMPLE POLICIES & PROCEDURES

[DONORRELATIONS.COM](http://DONORRELATIONS.COM)

# OUR GRATITUDE OVERFLOWS

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Thank you to hundreds of talented and generous, industry professionals who took the time to participate in our 2022 sample swap.

Providing the nonprofit industry with free samples of donor communications has been a pillar of the work we do at the DRG Group for more than a decade. We simply cannot do this work with you—the amazing DRG Community.

Your work continues to inspire us—thank you for sharing it with us!

With endless gratitude,

The DRG Group

## THANKVIEW STRATEGY CONVERSATION AND DELIVERY CHECKLIST

Thank you for reaching out to send a ThankView message! Please review this checklist, and during our strategy call, we will discuss the options available to you when sending a message through this platform.

Our University branding is built in and, unless otherwise requested, we will use the primary typeface and colors determined by University Communications. Please be thinking about:

- Target audience
- Goal of messaging
- Graphic options
- Customizations
- Timeline
- Next steps

### Recipient List

For recipient lists of more than three (3) individuals, please provide an Excel file with the following information:

- First name
- Last name
- Preferred name or nickname
- Email address
- Cell phone number (if delivering via text message)
- Constituent ID

\*\*\* PLEASE ENSURE THAT TRUSTEES, FORMER TRUSTEES, AND TRUSTEES EMERITI ARE REMOVED FROM ANY LISTS UNLESS IT HAS BEEN DISCUSSED AND DOCUMENTED, IN WRITING, WITH ANN LLOYD BREEDEN AND SHARED WITH DONOR RELATIONS.

### Delivery Settings

Select:

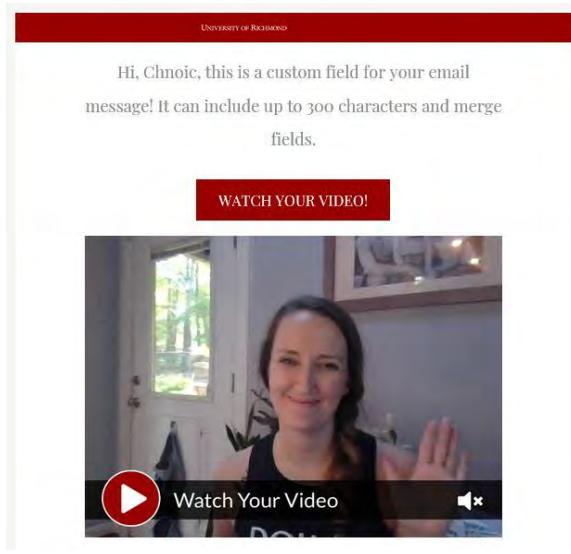
- Envelope*: best for invites, thank you, birthday and holiday messages
- Thumbnail*: best for updates and messages that feature a recognizable subject or location

Hi, Chnoic, this is a custom field for your email message! It can include up to 300 characters and merge fields.

[WATCH YOUR VIDEO!](#)



SAMPLE ENVELOPE



SAMPLE THUMBNAIL

## Envelope Settings

Select:

Shield liner



Web liner



## Email Customized Fields

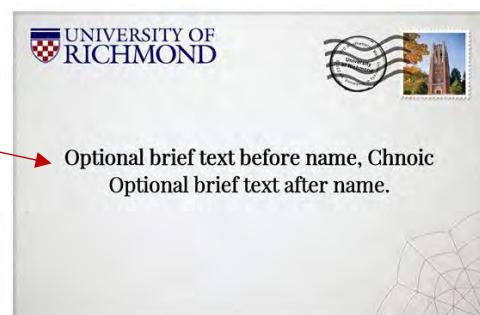
- Subject line (can include merge field)
- Sender name (can be individual or department, or on behalf of a campus partner)
- Sender email (any richmond.edu email)
- Link to landing page
- Text on envelope (can include one line break and merge fields)
- “Reply to” email (not visible)
  - To ensure proper tracking, preference is Donor Relations and/or gift officer
  - More than one person can receive replies.

Customized subject line!



Hi, Chnoic, this is a custom field for your email message! It can include up to 300 characters and merge fields.

[WATCH YOUR VIDEO!](#)

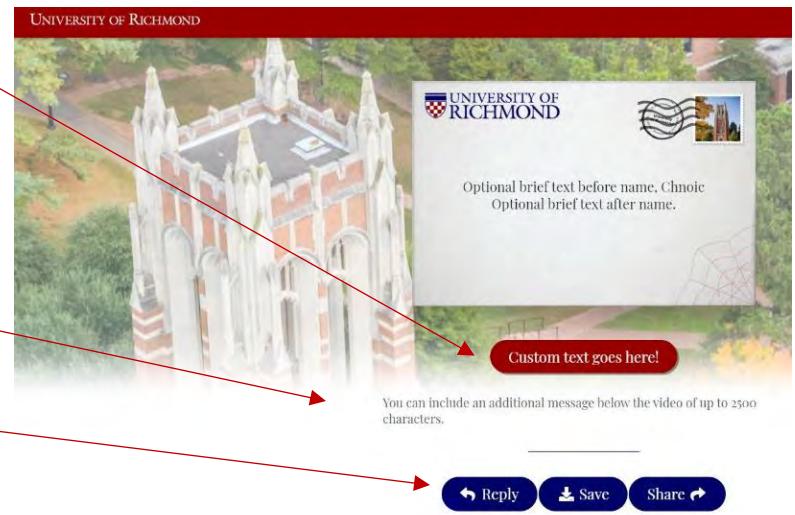


Optional brief text before name, Chnoic  
Optional brief text after name.

[Unsubscribe here](#) to stop receiving ThankViews from University of Richmond.  
Learn more about ThankView's privacy policy.

## Landing Page Customized Fields

- Call to Action (CTA) button
  - This is optional, and if utilized, can be linked to any website
  - Text is custom
- Text below video (2500 max characters with merge fields)
- Secondary CTA buttons (optional)
  - Reply
  - Save/download
  - Share on Facebook



Optional brief text before name, Chnoic  
Optional brief text after name.

Custom text goes here!  
You can include an additional message below the video of up to 2500 characters.

[Reply](#) [Save](#) [Share](#)



## PROCESS: REQUESTING AND SENDING THANKVIEWS

**Responsible Office:** Donor Relations (*Chnoic Clarke is the subject expert*)

**Process Implementation Date:** 4/14/2020

**Purpose:** In partnership with development colleagues (“**requester**”), Donor Relations will be utilizing the ThankView (TV) platform to connect with and steward our donors (“**recipients**”).

**Timeline:** The process documented below will be implemented on a short-term basis, with the goal to evaluate in three (3) months for process improvements and adjustments.

**Notes:** Workflow attached

### THANKVIEW SUMMARY

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ThankView (TV) is an informal cloud-based platform that enables us to message with authentic, less highly produced videos to our donors through email or text, called “**campaigns**.” TV campaigns can be one-to-one, one-to-many, and one-to-broad base. Once a campaign has been sent to the recipients, we have access to metrics to see how recipients interact (how many opens, forwards, views, etc.).

### THANKVIEW USAGE

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We will be using the first three (3) months, April – June 2020, as a trial period and will reevaluate our process and may consider extending usage and permissions in specific circumstances. Each TV campaign request we receive will be evaluated to determine if it meets our goals and purpose. We will be cross-checking the BBNC calendar to avoid donors being inundated with messages.

#### Types of ThankViews Currently in Scope

- Impact reporting:
  - specific endowed fund
  - building, program, annual fund, or corporate stewardship updates
  - targeted groups (recognition societies, Board of Trustees, parents, etc.)
- 1:1 messaging for strategic stewardship

#### Types of ThankViews out of Scope

- Birthday and holiday greetings\* (automated generic message)
- Gift anniversary\* (automated generic message)
- Event promotion
- Event follow-up\*
- Solicitations

\*These types of campaigns will be reconsidered in July 2020.

In order to avoid overusing the ThankView platform, requests will be prioritized as follows:

- 1- One-to-one communication (UR to donor/donor family/organization representative)
  - *This will be the majority of ThankView campaigns.*
- 2- One-to-many (UR to several people, but for a very specific, smaller segment)
- 3- One-to-broad base (UR to a large, major constituency group)

## THANKVIEW REQUESTS

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To initiate a ThankView campaign, requesters should complete the [ThankView Request Form](#). Once your request is received, and it's determined that a TV is the appropriate method of communication, Donor Relations will set up a strategy call to discuss roles, the TV checklist, and next steps.

Donor Relations will happily serve as a resource and creative partner. When possible, responsibilities will be divided as follows:

Donor Relations will be responsible for:

- o serving as a technical resource and creative partner
- o building, reviewing, and scheduling the campaign for delivery
- o consulting campus partner calendars
- o ensuring the delivery is recorded in RE
- o recording any communication received by Donor Relations as a result of the TV campaign in RE

The TV requester will be responsible for:

- o determining the general content and message
- o assisting in filming the video, if needed
- o providing the distribution list
- o routing the TV draft to other university stakeholders for review, if needed
- o recording any communication with the requester as a result of the TV campaign in RE

## THANKVIEW DATA AND TRACKING

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ThankView provides downloadable metrics that include bounced, unsubscribes, opens, clicks, started video, completed video, Call to Action clicks, number of views, downloads, shares and replies. While not directly integrated with RE, this data can be imported.

When sent, TV campaigns will be documented in RE by Donor Relations. If there is any reply to Donor Relations, it will be documented in RE. Any additional communication from the donor will also be recorded by the “requester.” We will be documenting ThankViews in RE in two ways: as an Action\* or as an Appeal.

*\*In RE, there is now a ThankView option in the Action type dropdown.*

ThankView Action

If a ThankView is strategic in nature and developed to be sent as part of a cultivation plan, it will be entered as an Action. This will be most one-to-one TVs, or unique to a donor or fund.

*Examples: Thank you message from leadership following a major gift commitment, donor-student communication, gift officer to donor message, etc.*

ThankView Appeal

If a ThankView is a more general message and sent to a larger number of donors, it will generally be entered as an appeal. This type of TV will likely require a list to be exported from RE, and then a global add will be done to document the message on the Appeal tab.

*Examples: Building opening and dedication messages to all donors, thank you/impact message to all SEF donors, etc.*

## **THANKVIEW IDEAS AND INSPIRATION**

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For examples of a wide variety of ThankView campaign types and styles, please visit [here](#) and [here](#).

To better understand how a ThankView campaign comes together, please watch this [video](#).



# RECORDING A THANKVIEW



*Tips and Tricks to help your ThankView message sound and look great.*

## DEVICE

You can record directly to ThankView with your **desktop** or preferably, your **mobile device**.



 *Be sure to hold your phone in **landscape** position to fill the screen!*

## LIGHTING

Choose a well lit location. **Outside** or **in an office** with ample amounts of **natural light** are best.



 *Be sure to find a location that is not backlit!*

## SOUND

Avoid windy locations and echo chambers. Phone mics pick up surrounding noise very easily!



 *A room with **less glass** and **more furniture** will have better acoustics.*

## FILMING ANGLE

For the best angle, do your best to be at **eye level** with the camera, rather than from below, when filming.



 *If using a laptop, consider placing it on a riser of any kind to keep the camera at eye level.*