



## Am I in the right workshop?

Are you:

- Already using VConnect tools?
- OR comfortable with learning new technology?
- A club or class volunteer?

This session is not intended for:

- Those not comfortable with technology
- Annual Giving or Planned Giving volunteers



# Agenda



- VConnect overview
- Data on Demand:
  - » Quick overview
  - » Creating your own lists: Get the data you need
- Email Marketing:
  - » Quick overview
  - » Five neat things to do with Email Marketing

## Getting Around VConnect

**Administration Center**

Home | Shortcuts | User Management | Email Marketing | Forms Management | Site Management | Mobile | Reporting

**TOOLS & RESOURCES**

- Client Community**  
Stay current with news and events from Harris Connect or network with colleagues.
- Interactive Roadmap**  
Learn about upcoming releases and new features of Harris Connect products and services.
- Client Portal**  
Alert us to issues, view your cases or search the knowledgebase for answers.
- Training Center**  
Access on-demand and live training sessions, printable manuals and other resources.
- Change Password**  
To ensure the highest security, we recommend that you change your password every 90 days.

**Announcements**

**2011 Users Conference - Save the Date!**  
Next year's conference will be held August 9-12, 2011 at the [Jedynski Conference Center in Chicago](#). 305 North Michigan Avenue, Chicago, IL 60611.

**Admin Tool Timeout**  
Please note: Users will be automatically logged out of the Admin Tool after a period of 15 minutes of inactivity. This measure is being taken as part of our ongoing efforts to ensure that the Harris Connect administration tools meet or exceed the latest standards in PCI compliance. We have implemented a browser session that disables all accounts.

**Product Enhancements**

**Forms - Granular Access Permissions**  
Released: 9/9/10  
Admins now have increased flexibility to grant detailed access to Form applications. [Learn more](#)

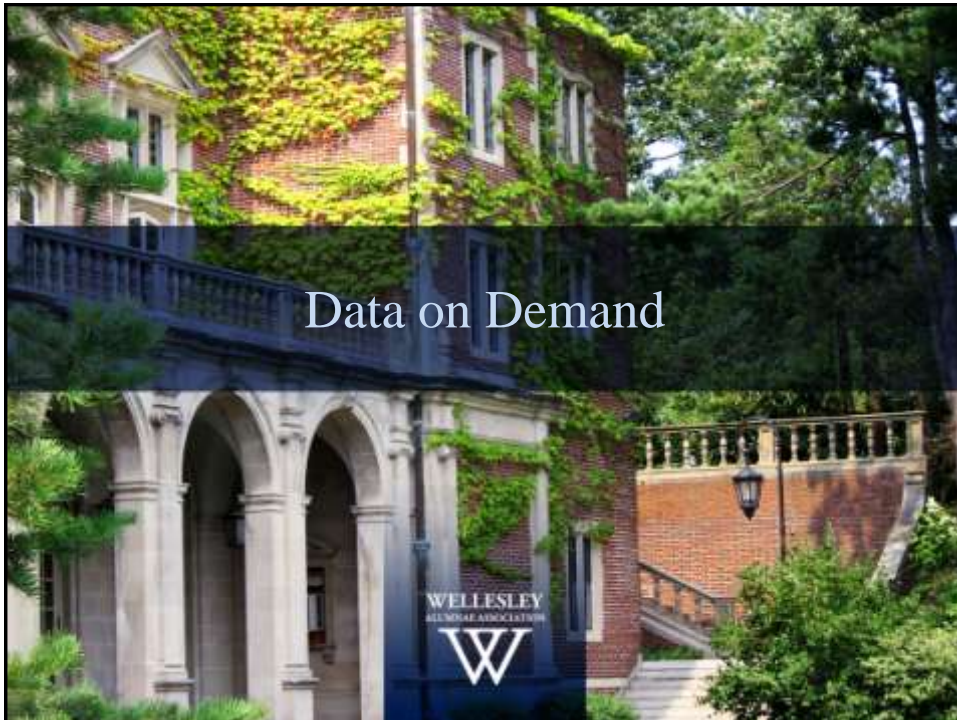
**Administration Center**  
Released: 3/30/10  
The Admin Tool will have a refreshed new look and friendly layout! [Learn more](#)

**Admin Manager**  
Released: 3/30/10

**My Community Updates**

**Notifications & Reminders**  
Event Forms

**Activity Snapshot**



## Data on Demand: The Easy Way

- Use pre-created lists
- Can use Excel to manipulate data



personal	personal	personal	personal	personal	personal	address	Address	personal
A0000001	Worthy	Wellesley	Wellesley				1871	
A0000002	Worthy	Wellesley	Wellesley				1886 Ms. Worthy	

## Doing More with Data on Demand

- Four tabs:
  - » Define Report Queries: WHO is included
  - » Define Report Content: WHAT info
  - » Assemble Reports: MIX & MATCH
  - » Run Reports: GET YOUR DATA

Define Report Queries Define Report Content Assemble Reports Run Reports



## WHO: Creating a Custom List

Define Report Queries Define Report Content Assemble Reports Run Reports

- Copy existing lists
- Modify as needed
- Add criteria: email status, state, class year, etc.
- Example: Club members over 90 years old





## WHAT: Customize Your Report Content



Define Report Queries Define Report Content Assemble Reports Run Reports

- Copy existing lists
- Add or remove data as needed
- Example: Names, phone numbers, birthdays

## Combine & Get Data



Define Report Queries Define Report Content Assemble Reports Run Reports

- Example: Get a list of names, birthdays, and phone numbers for all alumnae over age 90 in your club area, so volunteers can call them on their birthday.



## Email Marketing: The Basics

- 4 Steps:
  - » Create your content
  - » Create the email (combine content, email list, & subject, from address, etc.)
  - » Schedule & approve your email
  - » Check your reports

Create & Manage Content

Address & Assemble Email

Send & Schedule

Reports



## New! Updated Email Templates

- Class & Club templates updated to reflect new college visual identity
- Available in your class color!



## 5 Neat Things To Do w/Email Marketing

1. Add Images
2. Add Attachments
3. Create your own template
4. Personalize your emails for each alumna
5. Get more info out of your reports
6. Bonus topic: Conditional content



## Adding Images



- Images catch interest!
- But be careful:
  - » Avoid large images:
    - Over 500 px wide
    - Over 200 kb
  - » Don't make images indispensable
  - » Consider what your email will look like without them
- Example: Add your class or club logo



## Email with Images: Example 1



'64 CLASS OF 1964

You're Invited  
to our fabulous  
**Mini-Reunion**  
on the shores of Lake Waban



RSVP to Wendy Wellesley '64 by Monday, October 18, 2010  
at [wellesley@alumnae.wellesley.edu](mailto:wellesley@alumnae.wellesley.edu), or by phone at 555-123-4567



## Email without Images: Example 1



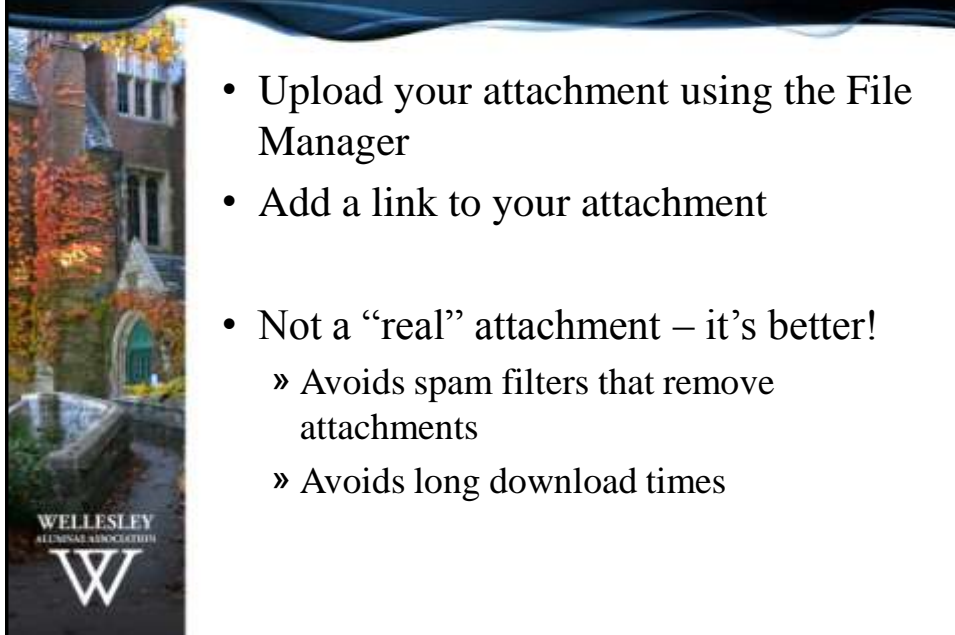
## Email with Images: Example 2




## Email without Images: Example 2



## Adding Attachments



## Attachments: Example



- Example: Send your newsletter in PDF format

**'64 CLASS OF 1964**

Dear Classmate,

[Click here to view our monthly class newsletter!](#)

Some highlights from this month's newsletter include:

- A report from Betty Smith, our class vice president, on this summer's exciting mini-reunions in Spain and Chicago.
- Information about our next reunion - only four years away!
- Photos from your classmates' travels around the world.


We hope you enjoy reading the newsletter as much as we enjoyed putting it together.

Sincerely,  
Your Class of '64 Officers:  
Wendy Wellesley, President  
Betty Smith, Vice President  
Sarah Jones, Secretary  
Liz Johnson, Treasurer

Wellesley College  
100 Central Street  
Wellesley MA 02158

This message is being sent to you through Service of Technology of Wellesley College. If you are not a member of the Wellesley College community, please do not click on the link. If you are a member, please click on the link to view the message. If you are not a member, please do not click on the link. If you are a member, please click on the link to view the message. If you are not a member, please do not click on the link.

## Attachments: Considerations



Things to think about:

- Post content to your website instead (you can still link directly to it in your email!)
- Make sure you include some email content: why should recipients click on the link?

## Create Your Own Template



- It's easy!
- Copy an existing template
- Modify it to your liking
- Copy that customized email for all future emails
- But keep footer text: **it's the law!**

Wellesley College  
108 Central Street  
Wellesley MA 02158

This message is being sent to you (Assistant Director of Technology Advancement Office of Institutional @wellesley.edu) because of your affiliation with Wellesley College.  
If you would like to be removed from future Wellesley College mailings, please [click here](#), indicate the appropriate options, and click submit at the bottom of the page.

## Personalization



- Personalize your email for each alumna
- Use “Data Tags” to include her name, city, state, class year, etc.
- Example: “Dear [NAME],”
- Example: “Host an event in [TOWN]!”



## Following Up: Email Reports



- See who got your email, who opened it
- See whose email bounced
- See who is clicking on your links – is your email driving your constituents to your website?

## About the Statistics



- Delivered – who received your email
  - » Not relative, but can be misleading
- Open rate – who opened your email
  - » A relative measure
- Bounced Emails
  - » Contact alums whose emails have bounced
- Links
  - » See who clicked on which link
- Statistics show first 72 hours of data

## Sample Email Report

Links to clicking							
Link	Count	%					
Unsubscribe tag clicks	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Unsubscribe from clicks	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Registration tag clicks	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Registration from clicks	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Update tag clicks	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Update from clicks	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Class Notes Book clicks (if included in email)	0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>		
Links to From:							
Other links:							
Link # 1 (html)	<a href="http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC/register.html">http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC/register.html</a>		4	1.14%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 2 (html)	<a href="http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC">http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC</a>		1	0.26%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 3 (html)	<a href="http://www.wellesley.edu/alumni/">http://www.wellesley.edu/alumni/</a>		0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 4 (html)	<a href="http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC/register.html">http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC/register.html</a>		164	47.12%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 5 (html)	<a href="http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC">http://web.wellesley.edu/Web/Alumnae/Volunteer/ALC</a>		88	15.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 6 (html)	<a href="https://www.alumniconnections.com/doc/pubs/ALC/forgetful.asp">https://www.alumniconnections.com/doc/pubs/ALC/forgetful.asp</a>		5	1.43%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 7 (html)	<a href="http://www.wellesley.edu/Alumni/Community">http://www.wellesley.edu/Alumni/Community</a>		2	0.57%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 8 (html)	<a href="http://www.wellesley.edu/alumni/alumni.html">http://www.wellesley.edu/alumni/alumni.html</a>		0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 9 (html)	<a href="https://www.alumniconnections.com/doc/pubs/ALC/subscribe.html">https://www.alumniconnections.com/doc/pubs/ALC/subscribe.html</a>		0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 10 (html)	<a href="http://www.alumniconnections.com/doc/pubs/ALC/subscribe.html">http://www.alumniconnections.com/doc/pubs/ALC/subscribe.html</a>		0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>
Link # 11 (html)	<a href="http://www.alumniconnections.com/doc/pubs/ALC/subscribe/showMail.asp">http://www.alumniconnections.com/doc/pubs/ALC/subscribe/showMail.asp</a>		0	0.00%	<a href="#">Display list</a>	<a href="#">Download list</a>	<a href="#">Make a new list</a>

## Bonus Topic: Conditional Content



- Define content based on recipient data
- Example: one content if a user is registered for the online community, another if they are not.
- Example: Include a note about a young alumnae event only for recipients in class years 2000 - 2010

## Wrap-Up



- Data on Demand & Email Marketing are powerful tools!
- “With great power comes great responsibility”
  - » Review emails BEFORE you send, and check your reports to catch problems
  - » Don’t distribute data from Data on Demand; respect alumnae contact preferences; be careful about how you use data
  - » When in doubt, ask!



## Who do I ask?



### **Alumnae Connections:**

#### **Director:**

Susan Lohin

#### **Classes:**

Christine Kurtz

#### **Clubs:**

Marisa Shariatdoust  
'09

#### **Groups:**

Karen Kerns '97

### **Technology &**

### **Communications:**

#### **Director:**

Michelle Gillett '95

#### **Technology:**

Anne Springsteen '01

#### **Communications:**

Thomas Haas

We're here to help! Give any of us a call.