



BEST PRACTICES & STRATEGY FOR WHARTON CLUB OFFICERS

This document is designed to be a supplementary resource for Wharton officers and volunteers using the NationBuilder platform. It outlines three phases for leading your club, starting with the fundamentals of organizing events, managing your website, and sending email. After learning the fundamentals, the sky's the limit! You'll have the opportunity to use more advanced strategies for building relationships, recruiting volunteers, and growing your club.



1. Getting started

Master three basic tasks to set your club up for success.



2. Building relationships

Get to know club members and invite them to be more involved.



3. Growing your club

Empower volunteers to help take your club to the next level.



PHASE 1: GETTING STARTED

Objective: Master three basic tasks to set your club up for success.

1.1 ORGANIZING EVENTS

Maintain an active event calendar on your website - Face-to-face club events are perhaps the most effective way to build a thriving Wharton community in your region, so always keep your event calendar active and up-to-date. You'll be using NationBuilder to publicize events and manage event registration. The basic thing everyone wants to know before registering for an alumni event is whether peers are planning to go. You'll notice that every event posted via NationBuilder will display who else is planning to attend and give people who register a chance to share the event on Facebook or Twitter. Both of these features are simple, proven ways to increase event attendance. Here are some best practices for organizing events:

- **Add social media sharing** - Under the specific event you've created at ["The name of your event"] > Settings > Social media, customize the default post that alumni can share on Twitter or Facebook after registering. For example, if you're organizing an NYC networking event, you can edit the social share prompt to "Join me at Wharton NYC's happy hour, register here." A link to the event page will be included automatically.
- **Define your event tags** - In the event settings, be sure to define standard tags for each event so you'll have a clear record of who's registered and who's attended each event. It is often useful to use both an event-specific tag and a general event tag. For example, your registration tags might be "*registered_bostonevent*" and "*registered_boston_happyhour2016*," while your attended tags might be "*attended_bostonevent*" and "*attended_boston_happyhour2016*." Your Wharton staff liaison can offer guidance on developing an effective tag library.
- **Record attendance** - During the event, be sure to keep track of who's attending. When you're sending follow up emails later, you can then send a different email to attendees versus no-shows.
- **Learn more** - http://nationbuilder.com/setting_up_an_event



PHASE 1: GETTING STARTED

Objective: Master three basic tasks to set your club up for success.

1.2 MANAGING YOUR WEBSITE

Keep your website content fresh and interactive - Club websites aren't static brochures. Instead, the best club websites present a few concrete opportunities for alumni to get immediately involved. NationBuilder websites provide over 30 different page templates designed to prompt specific actions like signing up, volunteering, registering for events, recruiting friends, making a suggestion, etc. Here are some best practices for building your website:

- **Your ladder of engagement** - Brainstorm your club's ladder of engagement by ranking the main actions alumni can take via your website, from "easiest" to "hardest." For example, JOIN < ATTEND AN EVENT < VOLUNTEER TO HOST AN EVENT is a common ladder of engagement. When alumni ask how they can get involved, your answer is clear and your website reflects this.
- **Delegate point persons** - Specific types of involvement can be easily delegated to club officers by defining point persons for each page type. For example, your Secretary could be the point person for your club's JOIN page, your Social Chair might be the point person for your club's EVENT pages, and your President might be the point person for a VOLUNTEER page. Each time someone signs-up via these pages, the respective point person will be notified so they can follow up as needed.
- **Define tags for each webpage** - Just as you set up tags for your events, you should also define tags for each page on your website. This gives you an easy way to keep track of who's joining, registering for events, or volunteering.
- **Learn more** - http://nationbuilder.com/ht_website



PHASE 1: GETTING STARTED

Objective: Master three basic tasks to set your club up for success.

1.3 SENDING EMAIL

Send concise and compelling email - Email blasting is the easiest way to get in touch with all of your club members, but don't forget what recipients experience! Alumni get a ton of email, so ask yourself: (1) Is an email blast necessary? (2) If so, is the email drafted to rise above the fray? Here are some best practices for sending email:

- **Less is more** - Emails that contain a concise ask or invitation are often more effective than longer newsletter-style emails. Photos, too many links, and too many colors also increase the chances that your email will be inadvertently marked as spam by the recipient's email service.
- **Learn about communication preferences** - Consider asking alumni to express interest in receiving certain types of email content (eg. event announcements), and email them accordingly.
- **Create a few different Broadcasters** - Think of "Broadcasters" as being the different voices of your club. When creating an email blast, you can send email from your default Broadcaster or create an alternate Broadcaster. For example, if an email contains a general invitation to the club holiday party, you might send from your default. If it is a more personal invitation, send it using a personalized Broadcaster, eg. "Jane Doe, Wharton Club of New York."
- **Keep track of how well your emails are doing** - After your emails have gone out, be sure to keep an eye on how many people are opening them and clicking on your links. Open/click rates of about 20% opened and 10% clicked are considered industry average, and many clubs do far better. If you're not getting satisfactory open rates, consider adjusting your subject lines. If you're not getting satisfactory click rates, edit your email body to clarify the one URL you want recipients to click. Finally, if you're getting high spam or bounced rates, be sure to talk to your Wharton staff liaison.
- **Learn more** - <http://nationbuilder.com/how-to-create-an-email-blast>



PHASE 2: BUILDING RELATIONSHIPS

Objective: Get to know club members and invite them to be more involved.

2.1 LEARN ABOUT YOUR CLUB MEMBERS

Use your club database - Your searchable NationBuilder database provides an incredibly powerful tool for getting to know your club and building relationships within it. Specifically, the filter tool (the funnel-shaped icon under the “PEOPLE” tab of your control panel) allows you to combine multiple search criteria to identify your club’s most and least engaged members. For example, you might filter to find everyone who has never registered for an event, who is emailable, and who lives in a particular zip code. Or you might filter to find everyone who has registered for an event but has never volunteered before (eg. doesn’t have the “volunteer” tag on their profile). The whole point is use these filters to develop a better idea of who’s involved, who’s not, and tailor your outreach strategy accordingly. Here are some best practices:

- **Create saved filters** - By saving filters, you can always return to them later (or even create a bookmark in your browser) to get up-to-date information on your club. Think about what filters you might save to quickly pull up your club’s most and least engaged members.
- **Map your club** - Ever wonder where your club members are clustered? Use the mapping feature to visualize your club and organize events in key locations likely to draw a crowd.
- **Find your influencers** - Say that you’re preparing for the biggest event of the year and you need help to generate publicity. It often helps to know who your club’s most active social media users are so you can ask them to help spread the word. You can sort your database or filtered results by “Klout” score or the number of Twitter followers they have. Both are simple measures of influence and reach on social media.
- **Learn more** - http://nationbuilder.com/how_to_filter



PHASE 2: BUILDING RELATIONSHIPS

Objective: Get to know club members and invite them to be more involved.

2.2 INVITE ALUMNI TO GET MORE INVOLVED

Develop a “call to action” appropriate for each segment of your club - Let’s say that you’re able to use filters to identify three main groups of people within your club: (1) A small number of people who are your club’s clear champions, (2) a larger number of people who have engaged once or twice in the last year, and (3) an even larger number of people who have not engaged at all. To really build relationships with alumni at scale, you’ll need to tailor your outreach to each group. For example, for group 3, you might concentrate your efforts on an invitation to your club’s ever-popular networking night. For group 2, people who already attend a handful of events, you might want to ask them to participate in a meeting to brainstorm new event ideas. For group 1, you might just want to send a simple “thank you!”

- **Send targeted email** - Once you’ve decided how to engage each group of alumni, simply tailor your email communications to each group. With NationBuilder, you can select email recipients based upon a tag, saved filter, or saved list. You’ll find that targeted email almost always gets higher open/click and response rates than general emails. The reason is simple: the more you take the time to communicate with fellow alumni based on their level of engagement, the more likely they are to get involved. For example, event emails tailored to (1) alumni who have attended a recent event, versus (2) alumni who have never attended an event, can make a huge difference.
- **Make 1:1 invitations** - The number one reason why people don’t get involved is they’re never asked. If you’re noticing that club events are attended by the same core group and you’re having a hard time reaching a particular demographic, use your database to identify key individuals for old-fashioned 1:1 outreach. Simply tell them that you would love to get them plugged in and ask them how they would like to be involved. You’ll be surprised by the results.
- **Learn more** - http://nationbuilder.com/how_to_create_a_list



PHASE 3: GROWING YOUR CLUB

Objective: Empower volunteers to help take your club to the next level.

3.1 RECRUIT VOLUNTEERS

Determine where volunteers can help your club reach its goals - You can't do it all alone! To grow your club and reach more alumni, you need to recruit volunteers to pitch in. Use your database to identify alumni who fit the profile of someone who might be interested in volunteering (eg. someone who's enthusiastically and repeatedly participated in the past), then send them an email inviting them to sign-up on a volunteer page. Here are some best practices for recruiting volunteers:

- **Set goals** - You can set a variety of goals right in your club's NationBuilder Dashboard tab. These goals might include how many volunteers you've recruited, how many event registrations you've collected over time, and how many members your club has.
- **Based on your goals, define the types of volunteers your club needs** - People like to know what they're volunteering for. Present alumni with several specific volunteer opportunities. For example, if you are looking to increase event attendance, you may want to recruit a group of volunteer club ambassadors responsible for spreading the word within their own social networks. If you are looking to diversify your club's social event schedule, recruit a group of event volunteers who commit to hosting one event each year.
- **Create paths** - Don't let your volunteers fall through the cracks. With Paths, you can set-up your Volunteer page to trigger a Path and point person each time someone signs up. The Volunteer Path will help to clarify what steps the point person needs to take in order to effectively onboard the new volunteer.
- **Learn more** - http://nationbuilder.com/goals_dashboard and http://nationbuilder.com/create_paths



PHASE 3: GROWING YOUR CLUB

Objective: Empower volunteers to help take your club to the next level.

3.2 EQUIP YOUR VOLUNTEERS

Distribute ownership among volunteers and track their progress -

NationBuilder makes it easy to empower volunteers with tools for multiplying your club's reach. In order to grow, clubs often have to overcome publicity and awareness challenges. Since your club (and the School) may not be in direct contact with alumni, it can be very effective to equip volunteers with simple methods of publicizing club events and other invitations within their own peer networks. Here are some best practices for using NationBuilder's peer-to-peer features:

- **Use the Recruiting page** - With the recruiting page, you can decide which page on your website you want to promote and what you want them to share. Each time you need to get the word out about an event or a specific invitation (eg. JOIN the club), simply direct volunteers to that recruiting page, where they'll be able to easily share the relevant link across a wide variety of platforms.
- **Tailor your club's social capital "currency"** - You can customize your club's social capital currency under the Settings > Defaults > Social Capital. The social capital currency will give you a single metric of engagement for each alumni.
- **Recognize your volunteers** - In conjunction with social capital, you can create a Leaderboard to recognize your club's top recruiters or most engaged volunteers.
- **Learn more** - http://nationbuilder.com/how_recruiters_are_tracked