

KPBS: A Case Study of the First Year of Sustainers in TV Pledge

Sustainer Challenges from a Web Administrator

Sustainer issues with the web can be divided into two issues: design and architecture. The architecture limits the design choices, so I'll start there. We use Convio and EFT Corporation to process our credit card and bank account sustainer contributions respectively. At the beginning of the transition to focusing on sustaining members, we had planned to use EFT for all sustainer contributions. Unfortunately, EFT informed us that they were not PCI-compliant, so we were forced to switch to Convio for credit card transactions.

There are a number of challenges when using Convio. The way Convio is set up requires us to have three different forms to process online contributions – one for sustaining members (a donation form), one for one-time contributors that want a premium (an eCommerce store) and one for one-time contributors that don't want a premium (a donation form). We have not found a cleaner way to present these options in Convio without making the user experience a lot more frustrating. In Convio, the sustainer donation form does allow premiums, but it doesn't offer any options for allowing users to easily search through the premiums. They have to choose a contribution level and then select a premium from a drop-down. Also – and this is a huge problem – Convio doesn't allow any way to track inventory of premiums on a donation form. This means that any tickets we offer on the sustainer page have to be very closely tracked.

The main problem with EFT Corporation is that any changes to the form can't be made in house. Any time we want to add or remove a premium we have to email EFT and ask them to make the change. This can be nerve-wracking when that premium is a ticket that we have run out of. Fortunately, the vast majority of people prefer to give by credit card rather than bank account, so this form is not heavily trafficked.

Given that we have to send people to four different forms in order to get money from them, we have experienced a number of challenges in figuring out the design of the user experience. Originally, we wanted to place two buttons on our home page – one that said something like, "Make a one-time contribution" and the other that said something like, "Become a sustaining member." However, there was a lot of resistance from our web department to this plan, both because it would require more real estate on our homepage and because we could not come up with any text and graphics combination that could explain the difference between the two types of giving in the space the size of two buttons. Therefore, we stuck with one button that says, "Support KPBS Today" and "Give Now."

The "Give Now" button takes users to a landing page. We went back and forth between two options when designing this landing page. We originally chose "back," but apparently should have gone with "forth." The option we tried first was an attempt to follow the number one rule recommended by the web community – get users from the beginning to the end of the process in as few clicks as possible. We clearly did not listen to the other rule – keep it simple, stupid. We placed all four options on the landing page. We split them apart into two sections: "Sustaining Contribution" and "One-Time Contribution." On the sustaining side, we had two options: credit card and bank account. On the one-time side, we had two options: receive a thank you gift and receive no thank you gift. Our graphic designer made some nice icons for each of them and we thought it looked quite clean and nice.

We were wrong. Dead wrong. One of our trusty web people later came to us and showed us that only 56% of people were making it past the landing page. And the average time people spent on this page was two minutes. Clearly, we had created a system custom-designed to confuse people.

Before



- Four options that didn't match logically → becomes a cognitive barrier to completing your intended action of donating
- Asking you to make a decision about how you wanted to pay – before you're ready to pay



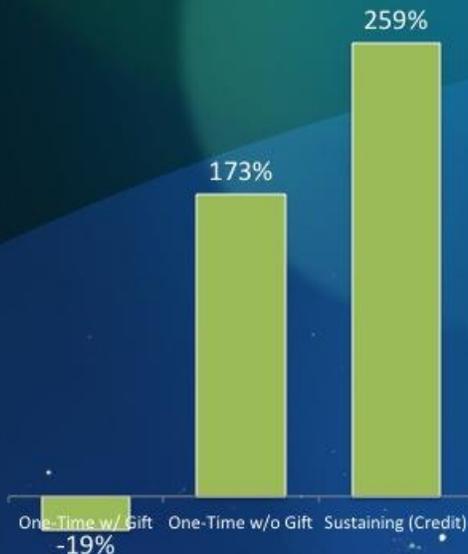
After: Average Time on Page Cut Nearly in Half to 32 seconds



- Two options:
 - Monthly
 - One-Time
- Sustaining clearly labeled
- Quicker decision: do you want to support us on an ongoing basis, or just once?
- Less confusion



Online Sustaining Gifts Increased the Most



- One-Time with Gift went down... but sustaining went way up
 - We effectively reduced the number of people going to the more expensive, less-optimal option
 - We simplified the choices, and made it easier for our TV audience to support us in an ongoing manner

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Next, we switched to Plan B. The landing page now has just two buttons on it – “Monthly Contribution – Sustaining Membership” and “One-Time Contribution.” The first button takes the user to the Convio (credit card) sustainer donation form. At the top of this page is a link that users can click on if they want to switch over to the EFT Corporation (bank account) sustainer donation form. The One-Time Contribution link takes users to the Convio eCommerce form. On this form, we have included a link that says, “click here to choose no gift.”

This has increased the number of clicks that it takes the user to get from the beginning to the end of the donation process. However, it has dramatically decreased confusion – only 11% of people ditch out of the landing page now – and our web revenue has increased significantly.

An addition we made early in the process was to require users to check an “I accept the terms of the agreement” checkbox, which is below a description of how sustaining memberships work (specifically that they remain in effect until you cancel them). We believe that the better informed users are on what they are getting into, the less chance we will have of being asked for refunds.

Here is the language we use:

TERMS OF AGREEMENT *Your authorization to charge your credit card shall remain in effect until you notify KPBS that you wish to end this agreement and KPBS has had a reasonable amount of time to act on your request. A record of each payment will be included on your monthly credit card statement and will serve as your receipt.*

Please note that as your card's expiration date approaches, KPBS will advance the expiration date by one year so that your contribution can go on working hard to support KPBS programs. If you prefer to have your contribution originate from a different card, or if you would rather participate via your checking account (which results in lower expenses for KPBS, making your gift stretch even further), please contact us at (619) 594-6983.

Your annual membership is ongoing. You may suspend your monthly payments at any time by calling (619) 594-6983 or faxing a note to (619) 594-3812.

You may also increase or decrease your monthly payments by sending written authorization to: KPBS Sustaining Member Program, 5200 Campanile Drive, San Diego, CA 92182-5400.

** I agree (box must be checked)*

The ideal situation (which we are far from reaching) is to have one form to rule them all – sustainers, one-time contributions, thank you gift, and no thank you gift. In the ideal world, the experience would feel a lot more like Amazon. Images of featured items – items from the program currently on the air and some station logo items – would be the first thing users would see after clicking the “Give now” button. The user would choose a thank you gift from the featured items, search through the rest of the catalog and choose one, or choose to receive no thank you gift. They would then be asked to choose how they want to give. The default option would be to give as a sustaining member, but this could be changed by the user.

Finally, they would fill out their name, address, credit card information. All of this would be completed on a one-page form that responded dynamically to the user’s selections. For example, if the user chose no thank you gift, then the thank you gift section would disappear and shorten the rest of the form. If the user chose to make a one-time contribution, then the terms of agreement for a sustaining member would disappear, shortening the rest of the form.

Sustainer Challenges from the Fundraising Data Coordinator

The main challenge that we faced was the ability to cope with a different “ask” on TV and the handling of the resulting data. The language used in the scripts over the air was not reflected immediately in the script used for gathering contributions or in the training that was imparted to the phone reps taking those calls.

Beyond semantics, the technology back-end needed to be able to process and accept correctly the data coming in. KPBS uses Teledirect’s proprietary software to process contribution calls and so the resulting file, a .txt or .csv, needs to be mapped correctly so that all the corresponding labels are also correctly mapped for upload.

KPBS uses a PB4 file to upload data into our Team Approach database. Each contribution, or pledge, needs to have the correct classifications attached to it to be clearly identified as a sustainer and correctly shuffled through the correct process. Processing is done by TRAC Media’s Pledge Automator, so the pledge automator needs to be reprogrammed to match and provide the correct classifications, payment methods and monthly amounts that will result from the new influx of sustainer pledges.

This new setup in the pledge automator will change your resulting PB files a little, so you need to be sure that it will be uploaded correctly. There was much trial and error in getting everything working together:

- The script to drive the calls
- The resulting files from Teledirect with the information labels
- The resulting PB4 file from the pledge automator to make sure all those labels got transferred correctly as classifications and that they live in the right place.

The next step is all about determining how to manage the confirmation letters that are produced and the changes that need to be made to those letters to address any potential legal issues.

We also added a line in the script to ensure that people understand what they are agreeing to. This is it:

I am going to read you the terms of agreement for ongoing monthly Sustaining Members. This covers both credit and bank account transactions. After I read this, I'll ask you to confirm that you agree. Your authorization to charge your credit card or bank account every month will continue until you notify KPBS that you wish to end this agreement. KPBS will need a reasonable amount of time to act on cancellation requests. A record of each payment will be included on each monthly credit card statement and will serve as a receipt. If you are using a bank account, we will send an authorization form in the mail. That form will need to be sent back with a voided check or deposit slip from the bank account that should be used. Do you agree to these terms?

Call Center

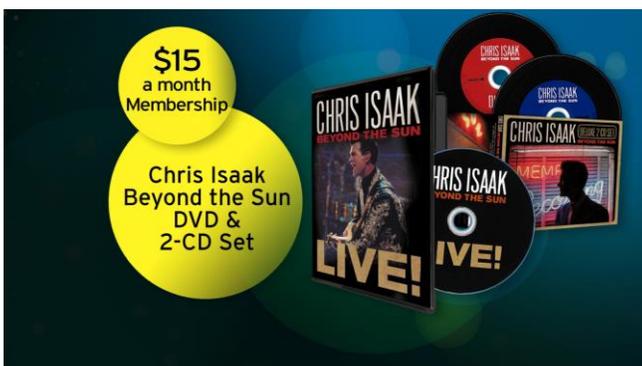
Prior to starting promotion of our sustainer program on the air, we sent a detailed list of instructions to the call center to explain exactly how the sustainer program was handled. Unfortunately, these instructions were not fully implemented by the call center.

During the summer, we received a higher-than-normal level of complaints from members. We decided to listen to recordings of about 100 calls from our phone service and identified a large number of problems with the way the calls were being handled – especially with regard to sustainers. We were able to work with the call center to resolve these issues, but it took some time and we would not have been aware of the extent of the problems had we not listened to recordings of our calls.

As a result of this experience, we strongly recommend listening to recordings of your call center's conversations with your members after any major change to monitor their understanding of sustaining memberships.

Sustainer Style Notes from a Spot Producer

In premium spots, we have about a minute and a half to make sure the viewer fully understands the idea of a sustaining membership, so clarity is essential. That means we have had to change our graphics and our pledge language a little bit. In terms of graphics, we previously had a yellow square flag in which we typed the premium level and its description-- now we have two separate bubbles, one for the level and one for the description. This makes it easier to see a transition from a one-time contribution level graphic to a sustaining level graphic. We have also added "a month Membership" in a smaller font size to every sustaining level graphic. For example, a one-time contribution of "\$90" would be a sustaining level of "\$7.50 a month Membership". Your graphics should be minimal and to the point. I never have the one-time level and the sustaining level on the screen at the same time. Instead, I transition from one to the other following the cue of the voiceover.



Your premium spot language can be a little more specific, but it still shouldn't take more than five seconds or so to say

what you need to say about a sustaining membership. Here are some lines I like to use:

- Sign up to become a sustaining member with an ongoing monthly contribution of \$5,
- Give \$90 right now or contribute \$7.50 a month
- You can also receive this gift with a sustaining membership of \$10 a month

My go-to words are: "sign up", "decide to become", "commit to", "sustaining membership", "contribution" (paired with "ongoing" or "monthly"), "sustaining member", "gift" (also paired with "ongoing or monthly"), and "a month".

There is not enough time to try to explain the options of giving by bank account or credit card in this 1:30 premium spot. Your pledge hosts should have enough time to explain that if need be. And you can also use the :30 How To spot that we produced for this project.

Sustainer Challenges from the Premium Manager

One of the challenges I faced in the premium department with sustaining members (which our department refers to as sustaining givers) was the confusion of codes. We created different codes for the same premiums in Team Approach when they were being offered at different levels (at a lower level for SG as incentive). At first, I was creating different variations of the five-letter code we are accustomed to creating and that became challenging because it created too many similar codes within the same pledge offer or completely different ones when my options were limited in Team Approach (because the code I was trying to use already existed in Team Approach for another premium). In the end, we decided to create longer codes for the sustaining giver premium level option by adding "SG" at the end of the non-sustainer code. Although having the "SG" at the end of a sustaining giver code made it clearer, we still had the issue of having too many codes for a particular program and premium. So we decided to keep the pledge levels the same for sustaining givers and one-time givers as much as possible. In these cases, the differentiation was done in the back end (by source code or program code).

Another challenge was keeping track of all the premiums in house with the various codes and having to adjust or move inventory around between codes. It really was tedious, but when the option for Forest Direct was available, I used them to direct ship and that helped avoid some confusion. And when it was time to place orders, I had to make sure I checked both premium codes to order the correct amount.

Also, creating the premium list we use as a reference became difficult to keep organized and easy to understand by all those who referenced it. We finally decided to separate the premium list by having all sustainer options listed at the bottom of the sheet with the monthly value listed by the code (rather than the full amount).