The Complete Guide to Digital Fundraising

Using Techonology to Connect with Modern Donors and Inspire More Giving

virtuous



TABLE OF CONTENTS

INTRO

BUILDING A HIGH-PERFORMING EMAIL STRATEGY

HIGH-TOUCH DONOR EXPERIENCES WITH AUTOMATION

CREATING THE PERFECT CALL TO ACTION

INCREASING YOUR WEB TRAFFIC

INCREASING CONVERSION/AVERAGE GIFT ON GIVING PAGES

THE IMPORTANCE OF RECURRING GIVING

LEVERAGING SOCIAL

MEASURING AND TESTING

CONTENT MARKETING

Digital fundraising has become the primary driver of new generosity over the last 15 years.

Online giving has almost doubled since 2012, and nonprofits received an average of 28% more online gifts in 2017 than 2016



Digital fundraising has become the primary driver of new generosity over the last 15 years. Your digital strategy can be the difference between having a massive impact in the world, or slowly dying because you lack the funds and momentum to succeed.

Don't believe me? Consider some of the latest stats on online giving:

- » In 2006 only 6% of new giving was motivated by email. In 2018, email is the PRIMARY driver of giving to most nonprofits and accounts for over 26% of all online revenue
- » Over half of major donors say they prefer to give online
- » 59% of email opens occurred on mobile devices
- » 34% of nonprofits pay for social media ads
- » Custom-branded donation pages nested inside a nonprofit's website raise 6X more money
- » Some nonprofits are reporting 63% more online donations from custom Facebook audiences
- » Online giving has almost doubled since 2012, and nonprofits received an average of 28% more online gifts in 2017 than 2016
- » Driven by our new subscription-based economy, recurring donations grew 70% from 2013 to 2017

In this changing landscape, it's critical that nonprofits are able to innovate to keep up with their donors. Unfortunately, many nonprofits have not modified their fundraising strategy to align with this new reality. This guide is designed to help give you the tools and tactics to effectively grow giving.

🗲 virtuous

USING THIS GUIDE

The guide has been divided into the major components of a great digital strategy (email, social, content marketing, giving pages, testing, etc). Each section is designed to stand alone, but we encourage you to review the entire guide to ensure the you're getting the most out of your online initiatives. Many of the themes build upon each other, and each individual tactic will rarely work in a vacuum. For example, it's hard to have a successful email strategy unless you understand testing and measurement, and it's hard to optimize your online giving pages you when don't have a good email strategy – you get the idea.

Much of the content in this guide was created by and/or inspired by an incredible group of digital fundraising gurus, including **Brady Josephson** (NextAfter), Brad Davies (Hatch Fundraising), and the team at Virtuous Software. We've copied or borrowed heavily from some of their most compelling content. Our thanks go out to these fine folks who are perfecting the art of inspiring generosity in our new digital age.

BUILDING A HIGH-PERFORMING EMAIL STRATEGY

by Gabe Cooper and Brad Davies

Like we mentioned in the intro, digital fundraising, and email in particular, has become the primary driver of generosity for nonprofits. A great email program can be the difference between thriving and dying.

And what's not to love about email communication? It reaches your intended recipient within seconds; you are able to personalize it and include images; you can make it as long or as short as you want and direct people to the next step you want them to take; and it costs almost nothing to send.

But with every positive digital channel, there's an equally big risk. Because email is "easy," most of our inboxes are filled with hundreds of other unread messages. This means that nonprofit staff often spend hours crafting the perfect email only to see it never get opened or read.

The volume of email most people receive is a a real problem for marketers. It's almost impossible to make your organization's messages stand out and drive action. That said, there are several things you can do to improve the success rate of your emails and rise above inbox clutter.

Be relevant

Relevance is the key to sending great emails. Strike a balance between what you want to say and what your constituents are interested in. And guess what – they are not interested in your organization; rather, they are interested in the impact your organization is making. Avoid organization-centric language or information about your new building or staff outing. Instead, focus on lives that are changed, stories of impact that donors made possible, and additional ways people can get involved with the cause.

If a person just signed up for your emails, acknowledge it. If a person is a long-time supporter of the organization, use language that reflects that relationship. Segment your email file based on key behaviors such as new sign-up, signed up but hasn't made a gift, donor, monthly donor, volunteer, and so on. It is important to realize the relationship



supporters have with your organization and to reflect that in what you send and the language you use.

This is one of my favorite examples of a relevant email. It is sent by Air New Zealand two days before a person boards a flight.



The gal pictured is the head flight services manager for the flight this traveler will be on. When you board the plane, Helen will be there to greet you in person. In this email, Air New Zealand provides a review of the flight itinerary, things to remember when packing, a 5-day forecast of the weather, and a destination tip. How much would you enjoy receiving this email if you were about to take this trip? The same could be true of your organization's emails if you focus on relevance to the end user before you send out any communication.

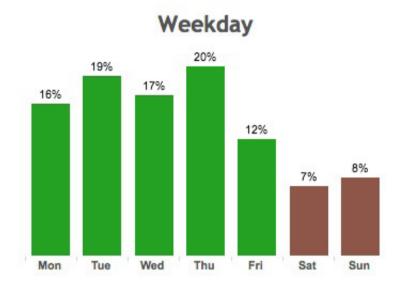
One of the easiest ways to increase relevance is to avoid traditional newsletters. No one wants one more institutional newsletter in their inbox. Even if you're sending regular emails monthly, your emails and subject lines should feel current and provide value to your subscribers. Avoid cluttering your emails with too many stories like a traditional newsletter; focus instead on a small number of high-impact and compelling issues that affect your cause.

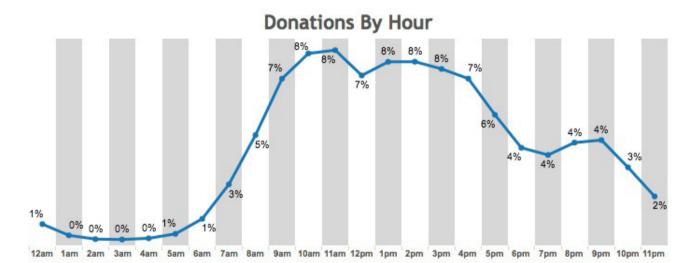


Send at the right time

There is plenty of data on when to send an email, and most email service providers will even provide a feature suggesting when might be the optimal time to send an email to a particular person. Those are all great pieces of information, but if you are a fundraiser, a better thing to know is, "When are people likely to donate?"

Network for Good analyzed the volume of donations they received on their platform and found that the majority of online giving occurs during the week, during the workday. So if you are sending out an email appeal, target that window.







Design for mobile

More than 60% of all emails are read first on a mobile device, and according to a Dunham+Company study, 18% of donors said they have used a mobile device to give to a charity. It's critical to make sure that your emails are easily read on a phone or tablet. Available for free are several responsive (adjusts the size based on the screen of the device) email templates that you can use without having to know any HTML code. Good email tools will have great mobile-responsive templates built-in. If you can't find a template you like, try using Litmus templates – they are always on top of changes when it comes to sending and receiving emails.

In addition to using a responsive email template, make sure that your email is designed with a single column eye path, so the user just has to read straight down the screen. In addition, if you are asking them to take an action, give a donation, sign a petition, or watch a video, make sure they will be able to do it on their phone.



Personalize the email and get the details right

The little things in email all add up, so it is important that you consider the details as you create your communication.

Send from a person – If you are going to have the email be from a specific person, make sure the sender's name is in the From line. People respond to people, not faceless organizations. If that person is not well-known by your audience, then add the organization after the name so the reader has some association with why they are getting this email



🗲 virtuous

Write the subject line to arrest attention – An email inbox is a crowded place; to stand out you need to be different. You can do that by using a personal salutation and addressing your donors by name, building upon a problem your donors know about, or creating interest by teasing a topic. The goal of the subject line is to create a desire in people to find out more. Use A/B testing to try out different approaches to see what works best for your audience.

Think about your pre-header – The pre-header for your email is the first 104 characters of text that show up in an email client's preview window. This text can act as a secondary subject line, giving your readers another reason to open the email and read on. Or it can say "Unsubscribe" or "To view in browser click here" (Not a great use of that critical space). Make sure that you account for what is going to show up in that spot and use it to your advantage.

Habitat for Humanity . 2

Yesterday

President and Mrs. Carter spend one week buildi... Read this email in a browser Habitat for Humanity N...

I like this subject line from Habitat, but the pre-header fails to build upon that interest.



In comparison, in this email's pre-header you get more context as to why they are asking the reader to send a note to their field staff.

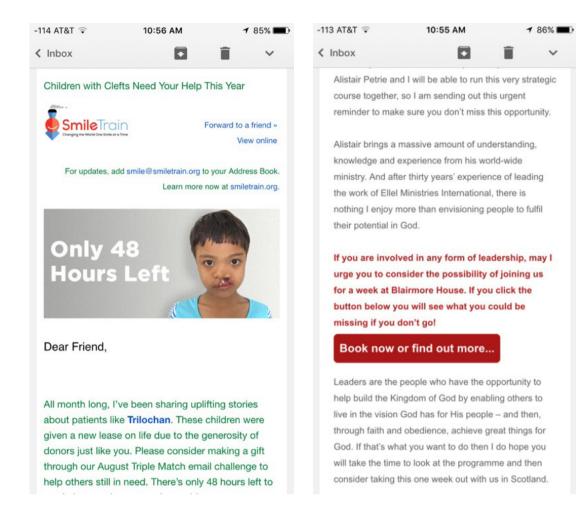
Have a compelling call to action

The entire job of an email is to get a click. Make sure that your call to action states what you want a person to do, forecasting for them what happens next if they press the link. Avoid lazy language such as "Submit" or "Click here;" rather, tie the call to action to the desired outcome, such as, "Provide a meal and a Bible" or "\$50 will reach 5 kids."

Here, Smile Train has used a compelling image call to action highlighting the impact a donor can have with a reminder of the deadline.



10



This call to action provides for two scenarios; for the person ready to book a spot in this event and for the person who still needs to learn more. Either way, clicking this link is the right next step.

This CTA brings up another great principle for driven results, and that is to use timebound urgency to inspire action. Most nonprofit emails dump content on the screen and then ask for a donation that has little urgency related to the content. You can easily create urgency by using a time-bound request for action (e.g. "We need 20 donors this month to help raise \$10,000 to build a school house before school starts in the fall"). This type of deadline-focused and specific call to action often performs better than open ended calls to action by an order of magnitude.

Emphasize clarity over creativity in copy

If you have ever stared at a blank screen trying to craft a message to your donors, you know how hard it can be. Instead of trying to be creative or cute with the copy, just

6

answer these two questions for your readers: "Why did I get this email?" and "What do you want me to do about it?" Your copy needs to answer those two questions right away. If it doesn't, go back and rewrite it.

The elements of your email need to build upon each other. The subject line should connect to the headline; the headline connects to the first two inches of copy; the body copy builds on the topic and leads to the call to action; the call to action asks for the right amount of commitment based on what you have told them and points your reader to the right next step.

Make your initial email signup valuable to donors – To grow your email subscribers, you have to find ways to give back to your visitors. Consider giving donors free PDFs to help them better understand your cause. Or provide exclusive access to content (or the frontlines of your cause) in exchange for their information.

CREATING HIGH-TOUCH DONOR EXPERIENCES WITH AUTOMATION

Gabe Cooper

I spend most of my time thinking about the intersection of fundraising and technology. I'm constantly looking for new technologies capable of helping charities inspire generosity. And, in my opinion, marketing automation is the most powerful (and underutilized) new fundraising technology available on the market today.

Marketing automation is simply software that helps organizations more effectively market on multiple channels (mail, email, social media, etc.) by automating a series of tasks. Remember the last time you ordered from your favorite clothing website, and you got 3 emails over the next week suggesting other items you might like? Well, that's marketing automation! In other words, automation helps you automate and personalize communication for 10,000 donors in a way that used to be possible for only your top 100 donors. Recent research shows that over 70% of businesses use marketing automation to drive customer behavior, but this technology is often underutilized in the fundraising space.

Each marketing automation series kicks off automatically (without your intervention) based on specific donor behaviors, passions, giving capacities, locations, etc. The key to automation success is identifying the donor actions which are the best indicators of an inflection point in the donor's journey.

"Recent research shows that over 70% of businesses use marketing automation to drive customer behavior, but this technology is often underutilized in the fundraising space."

There are several options for automation software (including Virtuous). The most important factors to consider when choosing an automation platform are 1) can the software automate more than just email (calls, handwritten cards, data updates, etc.) and 2) is the data fully integrated with my CRM so that I can include personalized gifting and

preference information in each email? When it's fully integrated into your nonprofit CRM, we believe that automation can be the key that unlocks generosity at your organizations without dramatically increasing your costs.

Once you've implemented your automation software, it's time to get to work building your first workflows (or sequences). We've included a few of our favorite marketing automation series below to provide clarity on how your organization can use automation to increase giving. The first workflow (New Donor Welcome Series) is almost guaranteed to increase giving if executed well.



Workflow 1: Welcome Series

Creating a strong relationship with new donors is critical to building generosity over time. An important aspect to new donor engagement is the effectiveness of your "welcome series" in getting a second gift in the first 90 days after a donor comes on file. Studies show that only 23% of your new donors will go on to donate again – but once they give a second gift, there's a 60% chance that they will give a third time. The key to getting a second gift is your ability to connect the passions and super powers of an individual donor to your mission; then you have a donor for life. They need to feel like they are a part of your cause.

A great way to create this connection is through a welcome series of communications that introduces a donor to your cause, as well as to stories about the impact of your work. Unfortunately, 70% of charities don't send a welcome series to new donors, which then does not lead to a second gift or foster a personal connection in the first 90 days. This lack of early connection is a generosity killer! We recommend a welcome series that touches the donor on multiple channels in order to dramatically increase the likelihood that they'll stick around.

Here's an example of a top-performing automated welcome series that we recommend starting immediately after a donor gives their first gift:

Day 1

Automatically notify a team member of the gift based on the size/designation of the new donor.

Send a thank you email to the donor that references the specific project they have given to. If possible, include a link to a video web page with details about that project or a similar project. If not, send them a link to a page that describes the impact of the organization.

If you are able to segment your mailings, add the donor to a "New Donor" direct mail segment so that they get a special insert in your next mailing thanking them and giving them an overview of your impact.

Day3

Send a more personal email with a story from the front lines. For example, "Hi again! We thought you'd enjoy this note from a Turkish business owner, as well as a few links to a couple of similar stories from Istanbul." In addition, make sure you're giving the donor a chance to give again.

Day 5

Send an email that asks the donor to engage as an ambassador for your cause. (Your donors are more than just checkbooks – enlist them in work!) For example, "Ready to tell the world about our impact in Turkey? Here are 3 ways to get the word out!"

Day 7

Assign a task to a team member at your organization to call the donor (or send a handwritten note). For example, "Hey Beth, thanks again for your generosity. We love that you've chosen to join us in our work. I wanted to check in to see if you had questions and give you a quick update on our work in Turkey."

Day 27

Send an email asking for the next gift. Refer to the initial project/designation if possible. If the original gift was under \$300, then ask for a recurring gift in the amount of the original gift.



Workflow 2: Project Impact

One of the best ways build sustaining relationships with donors is to thank them and follow up with them about the specific projects they have given to. Modern donors expect you to close the loop and let them know what their time and money are accomplishing in the world. Most nonprofits typically do a bad job of reporting impact back to their donors. As a result, donors feel like they are just transactions instead of feeling like collaborators in your cause. When a project completes, we recommend automating a series of communications to all donors who gave to that project. That series can look something like this:

Day 1 Email:

"We did it! The house that you helped fund is complete! We couldn't be happier with the results, and your generosity made it possible. We've included a picture of the family in front of their new home." If possible, film a quick smart phone video from the field of one of your staff thanking donors for the generosity, and include the video in the email. We'd also recommend including a gift ask for a similar project.

Day 3 Email:

"The family is in the process of moving into the house you helped fund. We thought it would be helpful to hear from someone in the community about the impact you've made. Harold from the village said, 'We couldn't be more thankful for the impact of xxx org in our village. I've never seen kids smile so much!' We'd love for you to share this story with your friends. Click here to share this story via email or social media."

Day 5 Email:

"Are you ready to continue your impact by funding another house? Click here to fund your next project and continue to partner with us in the village."

Day 7 Task:

If the original donation was over \$1000, assign a task to your team to call the donor, thank them for the gift and ask if they have any questions. Be prepared to talk about other related projects that need funding. Also be prepared to tell the donor about ways they can share the story with others in their community.

Workflow 3: Lapsed Reactivation

It costs far more to acquire new donors than to keep the ones you already have. Communicating with lapsed donors to reinvigorate their passion is an important strategy for growing generosity. Your CRM should be able to detect lapsed and pre-lapsed donors so that you can automatically kick off a stream of communication to reactivate. One of our favorite workflows for this includes:

Day 1 Email:

"We miss you! We noticed that you haven't given in a while, and we'd love to reengage you in our cause. Would you consider giving again? If you have any questions about the work we're doing, feel free to call me at xxx-xxx-xxxx or email me at xx@xxx.org. In the meantime, here's a story about the life of a woman that was impacted by one of our wells."

Day 10 Task:

Assign a team member to call the donor and relay, "I wanted to make sure you received our email with the story of the woman impacted by our work. Can I answer any questions for you about our work? Can we do anything to improve our work?"

Workflow 4: Planned Giving

Most charities lack a proactive strategy for soliciting planned gifts (wills, etc.). These long-term gifts can be crucial for the sustainability of your organization over the long haul. By mining donor data, you can identify planned giving candidates and proactively engage with them using nonprofit marketing automation. Here's a marketing automation series that can be helpful in driving new planned givers:





IF a Donor is over 55 and IF they have a wealth score of over X, THEN:

Day 1 Email:

"Thanks for your faithfulness to the cause. Have you thought about how your gifts can affect the next three generations of students in Malawi? Learn more about our 'Leaving a Legacy in Malawi' Planning Giving Program."

Day 5 Handwritten Note:

"Thanks for your faithfulness to the cause. Our Legacy team sent an email a few days ago about a program we have to expand your impact over the next 30 years. I'd love to talk more about it when you're ready."

CREATING THE PERFECT CALL TO ACTION

In the previous sections we spent a little bit of time talking about the importance of a compelling call to action. In this section I wanted to take a little bit more time to unpack the elements of a good CTA; I think a great call to action on your website and emails has the potential to be a significant factor in determining your average gift size and gift conversion rate. A call to action should both 1) speak to what is important to your organization and 2) connect with the donor in a way that moves them to action.

Calls to Action should be consistent across your email, home page, subpages, donation page and social media. Visitors who experience your brand across different media should get the sense that your vision is singular, focused and consistent.

We've found that these 4 rules will have the biggest impact on giving when applied to web or email-based CTAs:

- Use clear and specific calls to action throughout your site Donors want to have a clear view into their impact. Feature projects on your home page and subpages that include clear, specific, and urgent calls to action. For example, "Donate to Us" isn't clear or specific. "Your \$50 will Save a Child from Malaria" is much more clear and will inspire far more giving.
- Make the Donate button obvious Far too many organizations feel guilty about asking for money and hide their donation button. Your donors want to help. Don't hide. Feature projects along with a strong, visible button in the upper right of your site navigation. Give your visitors a clear, obvious chance to respond. It's fine to use a more generic "Donate" button in your site nav, but be as specific as possible within your site/email content.
- Reduce barriers to your giving form If a visitor clicks "Donate," they should be taken directly to a one-step giving form. If you have other giving opportunities (volunteer, planned giving, etc.), you can provide links from this page. Make it easy! They should be selecting their gift amount after one click. And while they are selecting an amount, they should see a reminder (usually off to the right) that reminds and reinforces why they are giving. They should also see a donation button with text like "Submit and Save a Child" to reinforce

the gift. You want to remove all mental and emotional friction from the process. Giving should be a no-brainer.

Use a secondary call to action to collect mail – Many of your visitors won't want to donate right away. That's okay! Nobody wants to get married after the first date. Make sure donors have a compelling opportunity to give you their email address. "Sign Up for a Newsletter" is not very compelling. Make email signup easy on your website and tell your donors about the exclusive value they'll receive in return for their information. For example, you can use downloadable assets designed to help the donor (e.g. a downloadable PDF called "How to talk with your friends about the foster care and adoption crisis") in exchange for their email.

INCREASING TRAFFIC

Brady Josephson, Brad Davies

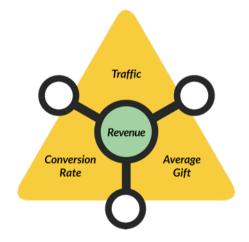
The three essential ingredients to fundraising growth are:

- Attention (you have to earn it)
- Motivation (you have to increase it)
- Friction (you have to reduce it)

And when it comes to online fundraising, those ingredients are measured using the following three metrics:

- Web Traffic (attention)
- Average Gift Amount (motivation)
- Conversion Rate (friction)

Those three variables are what dictates online revenue and what the lovely fundraising nerds a NextAfter have called the Flux Capacitor of Revenue Maximization, or FCORM



Of these ingredients, increasing motivation/average gift is often the hardest. Knowing who your donors are, what makes them tick, and some donor psychology can help, but it's pretty messy. Improving conversion is more straightforward with the right software, but as Nathan from NextAfter points out, traffic is often the least understood of these metrics which help boost online revenues.

🗲 virtuous

The beauty of NextAfter's FCORM is that each variable is equally weighted in terms of driving revenue. Increasing conversion rate, traffic, or average gift all have an equal impact on giving. So an increase in traffic – especially if it's quality traffic – is just as valuable as increasing the average gift and/or conversion rate. Plus, increasing any two variables can have a multiplier effect. As a side note, the fourth secret ingredient of this equation is recurring giving; but we'll talk more about that in a later chapter.

Since we're talking about conversion rates and increasing average gifts in other chapters, I'd like to spend most of our time here on increasing traffic at the top of your funnel. While email is the easiest way to drive existing contacts to your site, it's sometimes hard to figure out how to attract brand new visitors. The most obvious way to attract new visitors is through SEO (Search Engine Optimization). SEO is the most affordable way to ensure that your site appears first in the search results when people are searching for terms related to your cause. Paid ads and social shares can also increase traffic, but at the end of the day, a good SEO strategy can be invaluable in driving results.

With that in mind, we've included our list of 8 Things You Can Do Today to Improve Your Search Performance. These tactics will help increase your search rankings and drive new traffic to your site.

- Start measuring, if you aren't already. Use Google Analytics and Search Console to tell you more about your search performance. Read Moz's beginner's article about Google Search Console and their beginner's guide to Google Analytics. You can implement the recommendations we discuss in this article, but without measuring your results, you'll have a hard time seeing improvement. Start with measurement first!
- Test your page speed with a tool like Pingdom Speed Test. Look into the items on your pages that take the longest to load, and review recommendations provided by this free tool. Give them to your website developer or see if a local web development company will do pro-bono work on your site to improve speed issues.
- Test your site on mobile browsers. Cross-browser testing tools exist to give us an idea of what our visitors see when they access our pages from different devices. It's hard to create a site that is perfect for every single phone or

tablet, but for the most popular devices, it is certainly reasonable. Apps and plugins exist to help your site become mobile-friendly; contact your web developer for more information.

- Optimize metadata and content on the pages you want to rank, which we outlined above. This is something you can start doing this week! Conduct research and use our tactics to optimize specific pages.
- Set up Google Alerts for your nonprofit's name. These alerts can be sent via email and help give you an idea of who is talking about your brand. Try reaching out to those who have talked about you but didn't link to your website. Make sure their readers can find your website by asking them to update the page with a mention of and link to your site. Seeking out unlinked brand mentions is a great way to build more links to your site.
- Clean up any duplicate or recycled content. Take the time to rewrite it and improve on it. Taking the easy way out and verbatim copy/pasting content is a no-no when it comes to SEO. You'll have a hard time ranking pages that have duplicate content.
- Determine which pages on your site that visitors go to, but then don't navigate to other pages from. In Google Analytics, this is called a bounced visit – they simply don't visit other pages on the site. Examine the page and ask yourself how you can entice visitors to visit other places on your site. Is there a call to action on the page? Are there links to other pages, besides what's in the navigation? Update this information and see if you can reduce your bounce rate.
- Start promoting quality content on your site through social media if you're not already doing so. Remember to promote older content too, if the quality and content still benefits your audience. Make sure to include those in tweets, Facebook updates, and on Pinterest and other platforms.

There are many things you can do today to help strengthen your local signals and promote your site to your audience. It takes some time to get momentum in SEO, but if you're consistent in the practices, you'll start to see your site rank highly for more keywords, and your site traffic will increase.

INCREASING CONVERSION/AVERAGE GIFT ON GIVING PAGES

Gabe Cooper, Brady Josephson

"Custom-branded donation pages nested inside a nonprofit's website raise 6X more money."

Traffic. Average Gift. Conversion. These are the 3 essential ingredients to fundraising and online fundraising. We've spent some time talking about an email strategy that motivates people to click to your site. We've also looked at best practices for driving new visitors to your site. Now what? Once a curious visitor is on your website, how do you move them to action? And specifically, once they click "Donate" and go to your giving page, how do you ensure that your visitors complete their donation, maximize their gift amount/generosity, and tell their friends?

We've spent the last couple of years sourcing tips for a conversion-focused donation page from some very smart people and groups – based on their experiences, research, and work. We'll outline those suggestions later in this section. But before we get too far, we'd like to lay out the core principles of any conversion strategy.



3 Principles of Conversion

You have to test

Occasionally, you'll find some experts that disagree with the tips below. Or you'll find sites that are very successful by breaking several of the tried and true rules of online fundraising. For example, I don't think you should ask for communication preference in your donation flow, and I wouldn't put social icons in the footer of your donate page, either. Social icons only add more links and possible distractions, taking donors away from your donate page. That said, I have seen several pages that have been successful while completely ignoring that advice.

This is why you need to test these tips for yourself and your organization.

Testing is one of the reasons I love modern software tools; modern software allows you to create a page in minutes and set it up to A/B test to see what leads to more clicks and donations. So by all means, start with an opinion or guess, but go out and prove it to yourself and, more than likely, your boss.

A less scientific (and less reliable) way of testing is to get a couple of friends or colleagues who don't support your organization to make a donation. Give them a few bucks or buy them a coffee in exchange for their notes on their giving experience.

You and your organization should be doing this at least twice a year (signing up for emails, too), and preferably every quarter. Go through the giving experience and think about what would get your attention on each page, what would motivate you to complete a donation, and any friction you have to overcome to complete it.

It's hard to know exactly what works and why, but if you don't test, you'll never know. We'll talk about testing more in a later chapter, but needless to say, it's a key part of a successful digital strategy.

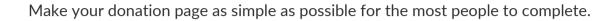
You have to keep it simple

Of the tips below, many of them are centered around the idea of simplicity. Suggested donations. Clear copy. Fewer links away from the page. Collecting less information. By the time someone has reached your donation page, they have expressed at least some interest in making a donation to your organization, so make it easy for them to do so!

This is why checkout donation systems – the ones where you can "add to cart" – are terrible for online donations. There are too many choices to make (what do you want to "purchase;" how many of them do you want), and too many steps to complete the purchase (browse, select, confirm, complete). People aren't buying products from you – they are giving.

It can be tempting to attempt to build donation systems and flows that can meet all needs of all possible donors. You may get asked questions like, "What about someone who wants to make a monthly donation and a tribute gift in someone's honor at the same time?" This is a 1 in 1,000 case – why would you build a flow or process that caters to this at the risk of the other 999? You don't. That person or "edge case" can make their

monthly donation and do a one-time donation in someone's honor afterward. This is not poor user experience or bad customer service; making the majority of donors answer that question or have that option before they donate is.



It's about trust, and this is just the beginning

We talked about trust in our donation page chapter, but it's are worth repeating here. Having a secure page and URL, donor testimonials, trust seals, banners, and badges is important. When people reach your donation page, they've either been inspired or made a decision to donate, and they just need a final bit of help to convince themselves this is a good decision. Be sure to give that to them.

Hopefully, the majority of trust has been built up leading up to this donation act, so you don't need to restate your entire case for support or all your stats. A few quick bullets and some trust marks from peers and credible sources is all you need at this point.

Remember that the donation is just the start of earning the donor's trust.

The "thank you" page they get directed to is key. Not only is it needed to help you track conversion properly, but it's the first experience they have after making a donation to you. Be thankful, have some useful content, and give them ways to continue to take actions that benefit you and make them feel good. The automated email that goes out after their donation (or email sequence; see chapter on automation), the tax receipt (if you send it out automatically), and the first email blast they receive are all crucial to keeping the trust they gave you with their donation and trying to earn more of it.

One of the best emails I ever received came about 9 months after my donation. They were giving me a specific update on the project I had given to with some info, photos, and even a video. That's how trust is earned.

Donors want you to be trustworthy before they make a donation, and you have to continue to prove it afterward.

These tips will help ensure that your donation pages motivate generosity and maximize conversion from each new visitor.

- Donors want a fluid, branded giving experience The lead-in quote for this section says it all: "Custom-branded donation pages nested inside a nonprofit's website raise 6X more money." Your visitors don't like the jarring experience of leaving your site to give a gift. A fully embedded giving experience increases trust and makes the donor feel like you have your "stuff" together.
- Make your impact clear and detailed We've talked about this before, but donors want to see clear and specific impact. They care much more about impact than they care about your organization. Be as specific as possible on what you are providing. (e.g. "Every \$50 you give will provide Malaria nets for a child in Malawi for 1 year.")
- Use quotes and stories to reinforce your ask Once you have a clear ask, use stories or quotes on the giving page to reinforce your impact. (e.g. "Because of the Human Fund, I was able to be the first member of my family to go to school. After graduating, I've returned my local community." -Bree, Human Fund graduate)
- Use gift arrays and prominent recurring asks to increase lifetime value Gift Arrays have been proven to calibrate the donor to your needs and increase the average gift amount. When combined with a strong recurring gift ask, your value per donor is guaranteed to rise. We'll talk about recurring gifts in another section, but this strategy is critical to your success in the modern fundraising environment.
- Collect as little data as possible It's tempting to collect as much information as possible from each donor, but keeping the form simple removes friction and helps ensure that your visitors complete the form. Long forms feel invasive, take extra time, and create unneeded hassle. You can often use data appends or social media scraping technology to add data after the fact if you didn't get all the details you need about the donor the first time around.
- Create pages for each campaign One of the biggest errors that nonprofits make is to push all visitors to the exact same donation page. The donor might have received an email that said "We're raising \$30,000 in June to fund a new orphanage;" yet, when the donor clicks to go to the page, there's no mention of the orphanage or the timeline. This kind of disconnect creates

confusion and lowers conversion. In today's world, every nonprofit marketer should be able to create and deploy a new campaign-specific donation page on their site without the help of IT.

- Make sure your page is optimized for mobile.
- Include Google Analytics and Hotjar (or similar tools) on your giving pages to measure and test your performance along with donor behavior.
- Make sure you use a secure (SSL) site with a PCI-compliant gift processor. Use seals from providers or watchdog groups in your footer to increase credibility.
- **Create a great "thank you" page** that expresses gratitude to the donor, seeks to give back to them, and provides guidance on other ways they can engage.
- If a donor does not give a recurring gift, be sure to give them **another option to set up a recurring gift in future emails**.

"In today's world, every nonprofit marketer should be able to create and deploy a new campaign-specific donation page on their site without the help of IT."

THE IMPORTANCE OF RECURRING GIVING

Gabe Cooper

We've touched on this concept a bit already, but I wanted to re-emphasize the importance of recurring giving. A recent study from NextAfter discovered that recurring donations grew 70% from 2013 to 2017. 70%!! That's amazing growth! Over the past 15 years, we have moved to a subscription economy. We no longer rent movies; we subscribe on Netflix. We no longer buy software; we subscribe monthly to our Adobe products. We no longer buy toothpaste monthly; we subscribe on Amazon Prime. I have friends who have even started getting their hair cut using a monthly unlimited service.

The tech company Zuora has been at the forefront of exposing and empowering this new economy. In the subscription economy primer they say:

"At the heart of the Subscription Economy® is the idea that customers are happier subscribing to the outcomes they want, when they want them, rather than purchasing a product with the burden of ownership."

And the stats bear this out. Credit Suisse recently reported that who? spent \$420 billion on subscriptions in 2017. That's up from \$215 billion in 2015.

So what does this have to do with giving?

Recurring giving should be the backbone of any healthy nonprofit. Recurring gifts take far less money and time to maintain, and they create a predictable revenue model for years into the future. If your cause can't be fixed overnight, then predictable revenue is what allows you to accurately forecast projects and staff expenditures without fear of next year's budget. In addition, recurring donors consistently have higher lifetime value then their one-off gift counterparts. A study by donorCentrics found that recurring givers are often worth up to 4 times more than their traditional giving counterparts over the life of the donor. Monthly donors are often retained over twice as long as a one-time giver. This increased retention means that you aren't leaking donors or continually chasing new donor acquisition to refill what you've lost.

🗲 virtuous

So how do I increase recurring giving?

We've discussed a few valuable concepts already, but we wanted to provide 3 core tenets to help you maximize your recurring donor base.

Tie real value to your recurring ask. Don't ask for "\$50/month to support my organization." Instead, tie the ask to impact. Try something like "\$50/month provides life-saving medication for a child in Malawi."

Ask one-time donors to convert to recurring donors in follow-up sequences. If a donor opts for a one-time gift, you still have another chance! All of your follow-up material, from your "thank you" page to your emails should prompt the donor convert to a recurring giver. This is especially powerful if your CRM, email tools and giving form can allow for pre-populating the value of the last gift. As a bonus, try identifying everyone in your database who has given at least 3 but not more than 10 gifts of under \$500 over the last two years. Create a campaign specifically to this group that asks for a recurring gift just under their typical average gift amount.

Take a cue from Child Sponsorship and lead with recurring giving as the primary way to engage with your nonprofit. Millennials are already calibrated to the new subscription economy, so provide them a solution that fits with their lifestyle!

LEVERAGING SOCIAL

Jeff Jacobs

In August 2003, the world of the internet changed forever. Six months later, the pace of change accelerated – at least for the students at Harvard. A year later, more change. Even more a year later. A year after that? You guessed it: more change.

I'm referring, of course, to the evolution of social media as we know it today with the launches of MySpace, Facebook, YouTube, Twitter and Tumblr in rapid succession. It's hard to keep this from sounding hyperbolic, but it's true: the way we interact with each other has undergone a massive, fundamental shift in just over a decade.

This shift in how we communicate isn't in some small, isolated corner of the world. Its arms touch everyone from the U.S. to Djibouti (sorry, couldn't resist typing "Djibouti"). **YouTube reaches over one billion – that's billion with a B – users who in turn watch hundreds of millions of hours of video per day. That's 2,190,000,000,000 minutes of video per year** – a number so hard to read, I'm guessing you spent a few seconds staring at it before you gave up or finally deciphered two trillion, one hundred ninety billion. I couldn't resist, so I did the math (okay, fine, Google's calculator did the math for me) and this means each year, nearly 42,000 centuries worth of time are spent watching videos on YouTube. Forty-two thousand centuries!

I'll pause for a moment while you pick up your jaw.

The world of social media and user-generated content isn't going away. In fact, the options available to us are increasing at a rapid pace. WhatsApp, Pinterest, Instagram, Google+, Snapchat, Vine – just a small fraction of the new ways to communicate. I could keep going, but I think you get it.

It's daunting. It's overwhelming. It's frustrating. I know, I've been in your shoes before, trying to break through the clutter just to get noticed by donors. But more importantly, this shift in how we connect also represents an incredible opportunity for nonprofits. Just as our culture has made a fundamental shift in how we connect with one another, nonprofits need to make a fundamental shift in how we communicate with our givers – and we now have an opportunity to do that in more meaningful ways on a scale that's

🗲 virtuous

never been possible before. By the way, posting a few status updates per week on Facebook won't cut it.

If you manage to harness just a fraction of the data available in social media, a world of opportunities will open up, enabling you to connect with givers on a real, personal level like never before.

So given this massive change, let's consider some of the practical implications of the social media revolution and how a modern software can help you navigate the post-revolutionary world.

If this restructuring of the way our society communicates leaves you feeling overwhelmed or even scared, you're not alone. But as I said before, I'm convinced this shift actually represents a tremendous opportunity for nonprofits just like yours. Here's what I mean.

If you're honest, it's probably difficult for you to imagine promoting your charity without the help of tools like Twitter and Facebook. But while these and other social media platforms are ubiquitous and continually evolving, many of the current CRMs used by nonprofits were designed for a pre-social media world. At best, they have some updates, patches, and plugins. But increasingly, they are acting like fish out of water.

Any modern software stack you choose for your nonprofit should be fully integrated with social. And there are two basic categories of software (excluding paid ad platforms) that you should be concerned with.

Socially Publishing

Publishing tools like Hootsuite give users the ability to schedule posts on multiple social channels at the same time. Scheduling your posts in advance helps your organization create a consistent, active presence on social media with limited staff. So what should you be posting? Great question! We could write an entire book on this topic, and the folks NextAfter actually offer a course on converting Facebook likes into donors that would be well worth your time. That said, I'd like to give you three basic principles to guide your social behavior as you move forward.

Don't talk about yourself! Tell stories from the frontlines of your cause, and connect

those stories to the impact your donors are making. It's not about you!

Ask questions early and often. You should be posting multiple times a week, and more than 25% of your posts should include a question for your audience.

Re-post great content from friends and allies. Social media is a collaborative platform, and your donors will respect a collaborative approach to your cause. It's counter intuitive, but this approach never cannibalizes donations. It only serves to increase your credibility and inspire action.

Social Scraping

The good news for charities like yours is that it's easier than ever to gather social data, without having to spend hours manually culling your social media connections for insights. Modern software allows you to "scrape" massive amounts of social media data and other public data sources at the click of a button. This means you have the ability to glean some really helpful insights about your givers with very little effort. Those insights include these kinds of things:

- Occupation and co-workers
- Interests and passions
- Real time social media feeds
- Friends and social connections
- Other organizations and networks relevant to your cause
- How supporters are related and connected to one another

The best tools don't simply depend on data within their respective systems – they look at the entire universe of available data to create insights and cultivate networks of givers. Dynamically leveraging social media and other online sources can help charities create personal connections at scale like never before.

Focusing on the Biggest Channels

Just about every charity has a Facebook page, and rightly so. After all, there are nearly

🗲 virtuous

1.5 billion Facebook users around the world today – roughly one fifth of people on the planet. Facebook provides an unparalleled platform for social marketing and social fundraising.

At the same time, Facebook continues to change the algorithm used for delivering your posts to your biggest advocates. Though advocates are by definition those who have opted in to your cause by liking your page, they are unlikely to see everything, or even most of what you share. This is part of Facebook's efforts to cut down on the amount of "promotional" content users see, recognizing that "a lot of the content people see as too promotional is posts from pages they like, rather than ads."

Whatever we make of Facebook's changes, the fact of the matter is that the new algorithm makes it harder for you to reach the advocates who are passionate about your cause. You will need to get creative, sharing content on Facebook that isn't merely promotional. Facebook outlines the kinds of promotional content to avoid, and Hootsuite has shared some tips on marketing on Facebook effectively.

Given the increased difficulty in connecting with givers and inspiring advocacy on Facebook, you'll need to think about how to reach your givers and advocates by different means. One potential slam dunk can be found on Twitter, which continues its pattern of growth; since 2010, the number of active users has grown from 30 million to 300 million, a remarkable tenfold increase over five years. Though it may not last forever, Twitter still lets you reach those who follow you without filtering out tweets it deems dispensable.

It should be clear by now that when it comes to Facebook, Twitter, and email marketing, there's no 1-2-3 way of ensuring a certain response from your audience. Those who tell you otherwise are ill-informed at best. To reach your audience and inspire them to action, you'll need to meet them where they are, and no two givers are exactly alike. To know where your givers are, and how they prefer to interact, you'll need to track how people are responding to your ongoing experiments.

Passionate givers and advocates are out there, but if you're not intentional in your efforts, you'll miss them.

MEASURING AND TESTING

Gabe Cooper

"Creative experimentation propels our culture forward. That our stories of innovation tend to glorify the breakthroughs and edit out all the experimental mistakes doesn't mean that mistakes play a trivial role. As any artist or scientist knows, without some protected, even sacred space for mistakes, innovation would cease."

- Evgeny Morozov

Many nonprofit marketers argue that the inability to test and measure results is possibly the biggest problem facing today's nonprofits. A lot of the nonprofits we see seem illequipped to set clear, testable goals and then create experiments that validate their hypotheses. As a result, organizations waste thousands of hours on activities that don't directly impact the cause, or the impact they make isn't measurable.

There are several ways to address this problem, but the basic testing principles used by startups is a great place to start. Most startups use this simple framework for testing and measuring results that can be applied at any level of a nonprofit. By using this 4-step process, nonprofits can quickly test and validate new ideas, or – just as importantly – validate and optimize existing initiatives.

Step 1: Hypothesis

Start by making a clear hypothesis (a best guess at solving a problem). The hypothesis can address both big and small problems at the organization.

For example, a hypothesis might be, "we think that unemployment in Charlotte is the number one cause of increased incarceration," Or, "we think that sending paper receipts doesn't create a positive financial ROI for our organization."

Once you have a hypothesis, you'll need to lay out your goals for it. If you are testing a new digital fundraising strategy, we recommend the following steps:

Identify your conversion goal

You need to have a target so that you know what success means. If not, you won't be able to design an effective test to achieve it. Start by knowing where you stand today. Determine your donation form conversion rate (number of visits to the page divided by the number of donations given). The benchmark nonprofit donation conversion rate is 4.29%.

Make sure you can measure your conversion goal

If you can't track it, you can't optimize it. This is where Google Analytics comes in. Set up a conversion goal so you can track the goal. Better yet, enable eCommerce tracking in Google Analytics so you know the value of each visit. If you are using a third-party donation form that sends donors off your site to a secure landing page, make sure you know the number of people that your site sends to that page (use the number of visits to the page before the donation form, then multiply that by the exit rate percentage). Then you can see the number of gifts you get during the same time period so you can figure your conversion rate.



A minimum viable product (MVP) is a development technique in which a new product is developed with sufficient features to satisfy early adopters. It is the minimum amount of work that needs to be done to test a hypothesis and determine whether a concept or product will work or not. Once the hypothesis is clear, the MVP will help validate it with the smallest amount of time and money possible.

For example, "let's set aside 10% of our donors over the next 4 months to get digital-only receipts with similar copy, then measure the ROI (cost vs. revenue) for those donors over that period."

For digital fundraising tests, this often involves designing your treatment of the hypothesis you want to test. Now that your hypothesis is created, you are ready to create a variation of your page or emails. Your existing page or email will become the "Control," and the variation will become the "Treatment." For your first experiment, we would recommend more of a radical redesign to maximize your potential lift.

🗲 virtuous



Step 3: Test

Set up a valid test and validate results.

Testing is simply a formal method for gathering data and validating a hypothesis. To create a valid test, consider the following:

Make sure to get a statistically significant set of data points (typically over 30 – e.g. 30 donors who stop getting paper receipts).

Calculate your estimated sample size. This will help you get a sense for how long your test needs to run. You can use Optimizely's Sample Size Estimator tool. You will need to know your estimated conversion rate, and you can use your current benchmark (see step number 2) or the nonprofit benchmark rate of 4.29%.

Create an A/B split test to compare the current solution against the new solution. A/B testing is a way to isolate and test ONLY the hypothesis while avoiding other variables Be very skeptical of soft, personal stories. Try to rely on hard data over the opinion of a few.



Step 4: Pivot

Fail fast!!! On a recent Modern Fundraiser Podcast, Jon Burgess encouraged our listeners to reward failure. Yes, you heard that right, reward failure. Unless your team feels the freedom to fail, you can never truly innovate. Fear of failure will always cause your team to drift to consensus thinking and fall back to "tried and true" methods of the past rather than taking risks and pushing toward innovation.

Most leading startups would rather prove a hypothesis wrong right away than meander in the wrong direction for years. A pivot is just a change in direction based on what has been learned. Getting clarity when it's time to make a change can be harder than you think. In fact, I've seen nonprofits knowingly walk down the wrong path for months without clarity on why they should change. Testing and data-driven analysis allows a nonprofit to learn what's wrong quickly so that it doesn't keep making the same mistakes repeatedly. When data either validates or invalidates your hypothesis, then it's time to be brave. Pivot!

37

You have seen the lifts that other nonprofits are getting from A/B testing, and now you are ready to do it yourself. But you might not be sure exactly where or how to start. So in this A/B testing guide for nonprofits, you will find some tips to begin optimizing your online fundraising so you can realize greater impact.

USING SOFTWARE TO RUN YOUR WEB PAGE TESTS

Jeff Jacobs

I can't stress this enough: be careful when drawing conclusions and making bold statements about statistics you uncover. Statistics don't get to mean whatever you want them to based upon who you're talking to.

To give you an example, years ago a coworker was giving a recap on the month's web statistics and said, "60% first-time visitors is a GREAT thing. It means we're growing." Later in the same meeting, the exact same co-worker used the exact same statistic to show how troubling it was that no one was coming back to the site. Huh? Only one of those statements can be true.

You also need to keep in mind that more doesn't equal better. It very well could be that a high pageviews-per-user means your visitors are highly engaged. It also could mean that your site is convoluted and hard to navigate (think about the last time you visited your state's DMV website

10 Tools to Analyze and Optimize Your Online Fundraising

Web Analytics Tools

GOOGLEANALYTICS

Revenue			Visits			Avg. Page Load Time (sec)		
£66,681	.69 .00% (066,681.69)	\sim	498,660 % of Total: 100.00% (498,660)	1	\sim	9.39 Site Avg: 9.39 (0.00%)		~~~
Total Goal	Completions		Visits by Traffic Source		×	Mobile Visitors		
1,875 W of Totat: 190.00% (1,875)			organic email (none) social network referral		Mobile (Including Tablet)	Visits	Bounce	
						No	425,503	72.49%
Goal Conve	ersion Rate					Yes	73,157	81.85%
0.38% Site Avg: 0.38% (0.00%)			4575			Internal Site Search	hes and % Sea	rch Exits
Goal Completions & Conversion Rate						Search Term	Total Unique Searches	% Search Exits
Medium	Goal Completions	Goal Conversion Rate				Pinterest infog raphic	345	39.13%
organic	777	0.34%				mobile	73	12.33%
(none)	445	0.53%	Organic Visits by Keyword			500	71	19.72%
email	324	0.38%	101101073	1000	Avg.	social media	71	11.27%
referral	158	0.37%	Keyword	Visits	Visit Duration	ecommerce	70	25.71%
social net work	132	0.28%	(not provided)	206,327	00:01:45	email marketin g	58	24.14%
WORK			econsultancy	572	00:05:19			
feeds	17	0.22%				facebook	58	17.24%

virtuous

KISSMETRICS

ar Product - Metrics				AL Need hel
etrics: Yesterday Last 7	Says This week Lastweek 1	This month Last month	+ Reorder Metrics	Add new metric
32.54%	2.18 4 Last 7 Days + Over the Last 20 days 2.29 erg	©. 261 Last 7 Days	12,355 Last 7 Days	View and create events View and add team members
Search Product to View Product Rate	Avg. Cart Size	Referred Friend after Purchase	Product Page Views	Your Business stats: 14,950,512 events lotal
© 29.42% Last 7 Days	48.02%	47.54%	© \$133,494 Last 7 Days	Avecome E-Commerce was added Aug 31, 2011 2,964,131 events this month 31 metrics
Product Page to Similar Recommended Product	New Landing Page Conversion Rate	Old Landing Page Conversion Rate	Revenue	17 reports
2,637	\$52.57 Last 7 Days	21,470	67 Last 7 Days	
Completed Orders	ARPU	Newsletter Signups	Order Errors	

MIXPANEL

Mispanel v							Evan Purcer
ACTIVITY	Send notifications automatically						New notification
ENGAGEMENT Punnels Segmentation	ALL ACTIVE INACTIVE					Q Seed	n
E Retention	Name	0	Schedule	Creator	Sent	Sending	Analytics
Uve view Bookmarks	Notify users within 30 minutes		Within 30 minutes	۲	88,026	011	at
A/B Testing	A daily notification		Daily at 1:00 PM	•	1,217	CH ()	at
S Explore	A weekly notification		Weekly on Friday	00	25,590	CH ()	at
Notifications	A one-time email notification		On 03/04/15 at 12	0	0	IN PROSPESS	all
Revenue	A one-time push notification		On 02/14/15 at 12	•	0	IN PROSPESS	al ×
	A one-time sms notification		On 06/10/15 at 12	•	0	IN PROSPESS	at
	🚓 A one-time webhook		On 04/08/15 at 12	•	0	IN PROSPESS	al
1. 🖗							

HOTJAR

68LV325	the second secon	ge to checkout som	FUNIVEL		
5 Haatmaps 31 Recordings	D 460	2015-03-24 - 2015-03-31			
7 Fannels	star s Homepage	STEP 2 Landing Page	STOP 3 Cart Page	STEP 4 Checkout	STEP 5 Thank you page
EDBACK Polls Serveys Recruiters	660	312 47.3% 07.660	565570445 248 795.046 07 312	120 45.4% CP 245	14390095 118 36.3% OF 120
	Васосог 52.7% (240) С жатси	Са матен	Сарания 51.6% (229 Сарания натон	саотоги 1.7% с) Уматен	

SESSIONCAM

Reports Overview	Marketing KPIs Centribution	Prospects Opportunitiesmore infor	reation	GoodDa	
GoodData	1				
Emails	30-Day Performance				
Forms	30-Day Performance				
Landing Pages	0.105	1 0 1 7		50	
Natural Search	2,135	1,017	26.7%	56	
Opportunities			Touched	Marris Oranda in	
Paid Search	New Prospects	Active Prospects	Touched	New Opptys	
Site Search	215.4%	302.0%	268.0%	26.3%	
Administration	213.470	302.0%	200.0%	20.370 ¥	
	Number of new prospects in last 30 days and change from the previous period.	Number of prospects with an activity within last 30 days and change from the previous period.	% of prospects enalled in last 30 days and change from the previous period.	Number of new opportunities created in last 30 days and change from the previous	
Recent History	prevent privat	charge men of previous period.	previous perior.	period.	
🚨 Kevin Chu					
🚨 Kevin Chu	Marketing Funnel				
C Thank You For Y					
	Marketing Funnel – All Time	Oppor	tunity Generation by Quarter 🖉 🔛		
	2,690	10,642 400 100,642 100 100 0		213 223 223 225 225 225 235 235 235 235 23	

rille Reports Overview GoodData

Emails Forms Landing Pages

Natural Search Opportunities Paid Search

Site Search

Other Great Web Testing & Optimization Tools

- Optimizely optimizely.com
- VWO vw.com
- Google Optimize marketingplatform.google.com/about/optimize
- Unbounce unbounce.com
- AB Tasty abtasty.com

Testing Your Email

Whether your nonprofit is trying to fix a "problem" with donor engagement or you're just committed to innovation and never satisfied with the status quo, A/B and multivariate testing is probably at the top of your list to improve communication performance. If you aren't doing A/B testing yet, check out our previous post, Getting Started with A/B Testing and this post from KissMetrics.

A/B testing can result in dramatic performance improvements. MailChimp published aggregated testing results from their customers on their blog post A/B Split Testing – Does it Help? When combined, the 11% increase in open rates and 17% increase in click-through rates would have a huge impact on revenue if used throughout the course of an entire year.

But what if you want to know how email campaigns boosted results in other channels? What if you need to know how much time and effort your team needs to dedicate to capturing an email address from existing supporters?

There are dozens of questions you could ask yourself, and a simple, one-time A/B test isn't going to give you the information you need. Fortunately, you don't have to guess at the best approach.

Enter long-term testing.

As you've probably guessed, long-term testing is a series of consistent split tests over the

course of weeks or months to answer big, broad questions.

Here are just a few long-term tests for email communications you should consider implementing to improve marketing performance.

Email Frequency

If I've heard this once from someone working at a nonprofit, I've heard it a dozen times: "I'd unsubscribe if you sent me X emails per month."

Great! Now what? Am I supposed to base our entire email marketing communication calendar on your subjective opinion (that might not be the same as our target market)?

The sad truth is, many nonprofits take this anecdotal feedback and build their strategy around that one (often times, loud) voice. What we should do is let our donors tell us what the right frequency is based upon their behavior.

Setting up the test

Split your list into two equally sized groups. Group A (the control group) should continue to get email updates at whatever frequency you're currently sending. Group B should get emails twice as frequently. If you want to take it a step further, add in a third group that gets emails at half the frequency.

Testing timeline

The timeline for this test could vary greatly depending on your list size and your current email frequency. Beyond just measuring if a test is statistically valid, you need to give this test enough runway to leave an impression on its recipients. In my experience, four to six months should start to give you a picture of how email frequency is affecting donor behavior across all marketing channels.

Metrics to consider when determining a winner

This type of test could have effects on all manner of marketing efforts. It's possible more frequent email communications could keep your organization's cause top-of-mind and boost response in other channels. On the other side of the coin, more frequent emails

could be burdensome on supporters, resulting in an increase in unsubscribes – and you won't know until you perform a statistically valid test.

With this test, make sure you're getting a holistic view into donor behavior. Don't just look at email response rates, email revenue, and open and unsubscribe rates. Look at the donor's total response across all channels. When looking at a donor's giving across all channels, make sure you only look at their giving during the testing period.

Email Length

It's the age-old question. As a statistics and email marketing nerd, I can really geek-out on this one.

What's better: a longer email with all the information a supporter needs to make a donation or a short email with a link to a landing page the drives supporters to make a donation?

Setting up the Test

Just like the email frequency test, you'll want to split your email list in two by segment. Keep all your email recipients in consistent test groups from email to email and wait for the test to become statistically valid.

Testing Timeline

You won't know what approach makes the most sense for your organization unless you test it. And unless you test this over a number of email drops, it will be a little difficult to come to any definitive conclusion. There are just too many variables and outlier responses that could skew your testing results if you tried to make an assumption based upon a single email or two.

Unlike the email frequency test, you can probably get valid results on this test in a matter of weeks, not months. Though it's possible this test could have an impact on results in other channels, it's less likely.

Measuring Results

Because this test isn't as likely to affect results in other channels, you're safe focusing your attention on email-specific statistics: open rates, click-through rates, social sharing, donations... and the list goes on.

Pull a list of email stats by test group. You should be able to total the results from each group and do a quick comparison on what the right approach is moving forward. Download a sample report I put together here.

Email Design

As a former Creative Director, I LOVE beautifully crafted communications. I love the subtlety of typography and original photography captured for a specific purpose. It doesn't matter if it's an email, direct mail piece, landing page, pamphlet, or conference PowerPoint: specific, unique communications just get me all jazzed-up.

But... I wish I could say subtle design was always the driving force behind my most successful email marketing campaigns.

The truth is, the most successful email I've ever sent to a nonprofit supporters had zero images, used the font Courier New, and links to donate weren't placed within carefully crafted language to get a recipient to click. They were bright blue and read something like "visit {http://here-is-a-really-long-url.com/some-path/finally-a-page/to-donate. aspx?cid=8362/} to make a donation."

Ugh!

To be clear, my "ugly" email only worked in very specific scenarios and wasn't a tactic I used on a regular basis. I did, however, perform a long-term test on slick, highly-designed emails vs. a more simple, straight-forward design – and the simple design won out.

Setting up the test

Not to be a broken record, but let this test run for a while. Don't let seasonality or strength of offer alter your view into the success of this test.

Perform this test over a number of email campaigns to normalize any spikes in giving and outliers in the response data. You can expect to start to get a picture of which style your donors prefer after sending just a handful of emails.

Measuring results

Be brutal. It might be painful, but take off your Creative Director hat off and let the results speak for themselves. If less stylized trumps beautiful design, so be it.

Just like with the email length test, aggregate your email statistics by testing group and do a quick comparison.

Document your learnings

Now that you have gone through all that work to create a test and learn from it, be sure to write it down and capture the learnings, good or bad, so that you can go back and review them. You want to build on your tests, not continue to repeat them. I suggest setting up a shared document with the documentation of each test you run or use a tool like Winstonknows.com (my personal favorite) to capture and document your tests. Having a resource like this also makes it easier to share the learnings across your organization or get new hires up to speed on what you know works best for your audience.

Parting Thoughts

Testing is essential. A/B and multivariate testing can dramatically improve results on any given email going out next Tuesday. But you could be missing out on having an even greater impact long-term if you don't start to answer some of the broader questions that have more than likely have been pestering you over the years.

If you cringed a little each time I used the phrase "statistically valid," don't worry: I've got your back. Use this handy test validity calculator from VWO to make sure you're not improperly making decisions on results that don't truly say anything.

I promise: it's not as scary as it seems. If you're committed to continuous improvement, take a closer look at how these long-term tests might help you more effectively raise support for your mission.

What does success look like for your nonprofit? It might be additional donations, volunteers or simply just more traffic to your site. Whatever success is, make sure you're primed and ready to measure it before you hit the publish button.

Google Analytics is available for free and is very easy to set up on your site. This program will track your visitors on your site and tell you valuable insights about them, such as which pages they frequent, how long they stay on your site and where they navigate to most. By measuring your success, you'll be better suited to develop even more content in the future.

Bottom-of-funnel content is just one part of the entire funnel. And while it's arguably the most lucrative, it's also just one part of the whole. It's highly recommended that you ensure your content can address an audience at every stage. Start thinking about modifiers and content types that will work for the other stages of the funnel too. See what amazing content you can develop in 2017 and start publishing today!

virtuous

VirtuousCRM.com info@virtuoussoftware.com