

# Direct Marketing 101

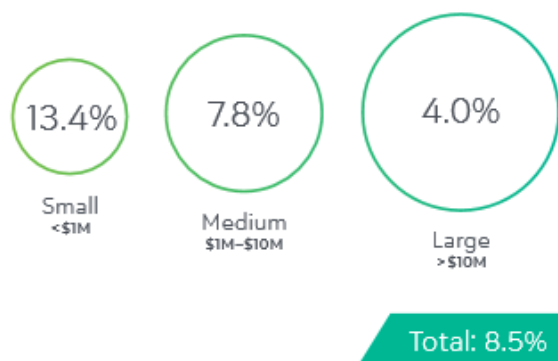
## Digital Fundraising



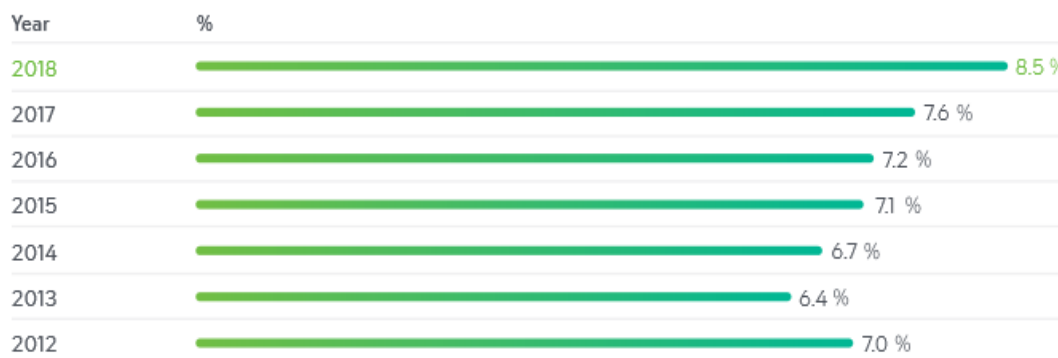
March 13, 2019

## Online revenue is growing, but still typically makes up *less than 10%* of total revenue

2018 PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING

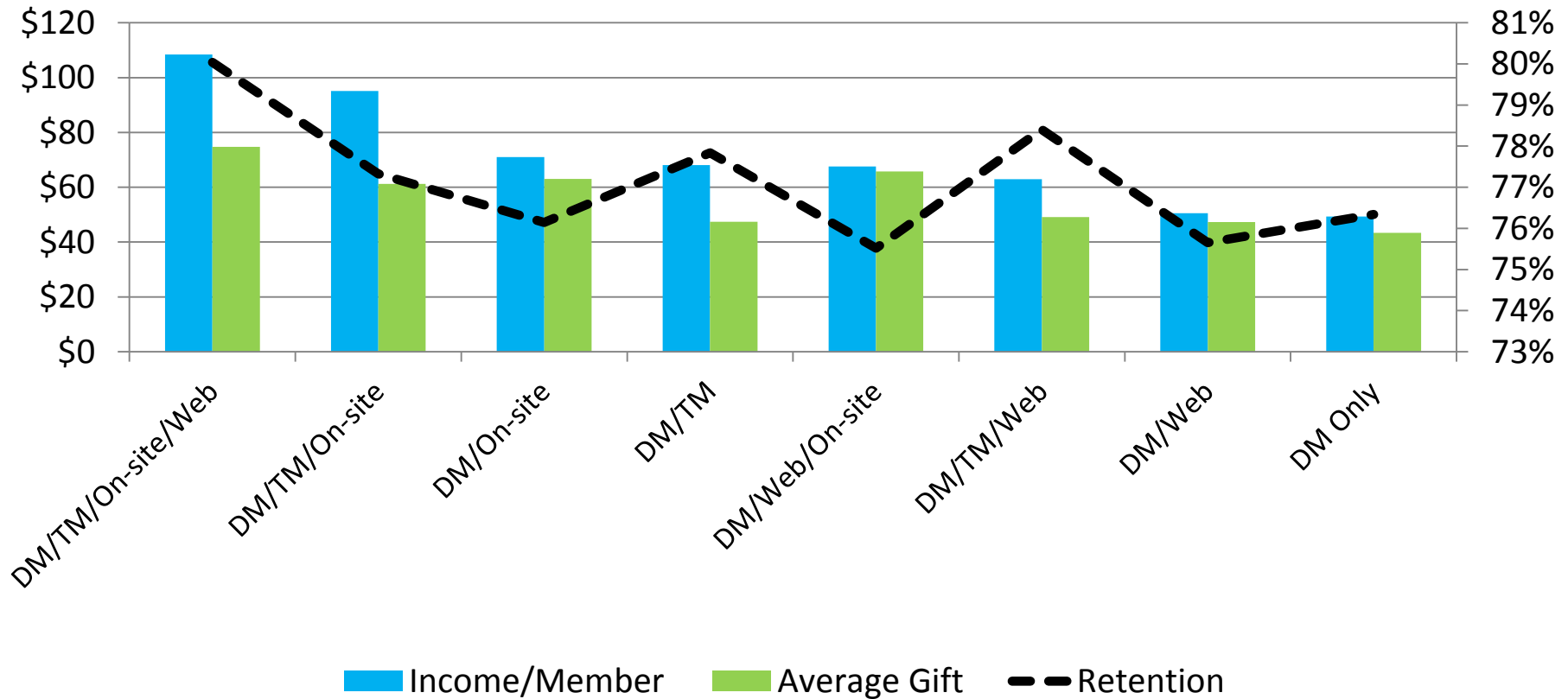


2018 PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY YEAR



Source: 2018 Charitable Giving Report, Blackbaud

## Why is integration so important? More channels = better donors



Integrate communications to avoid confusion and save time

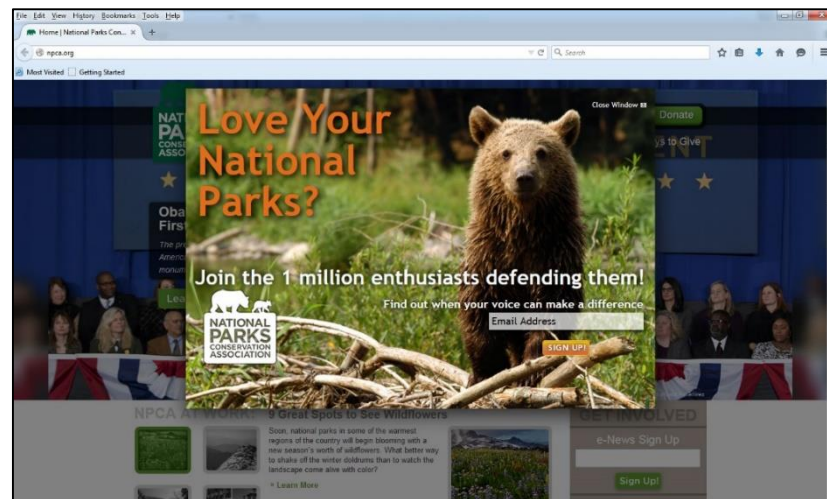
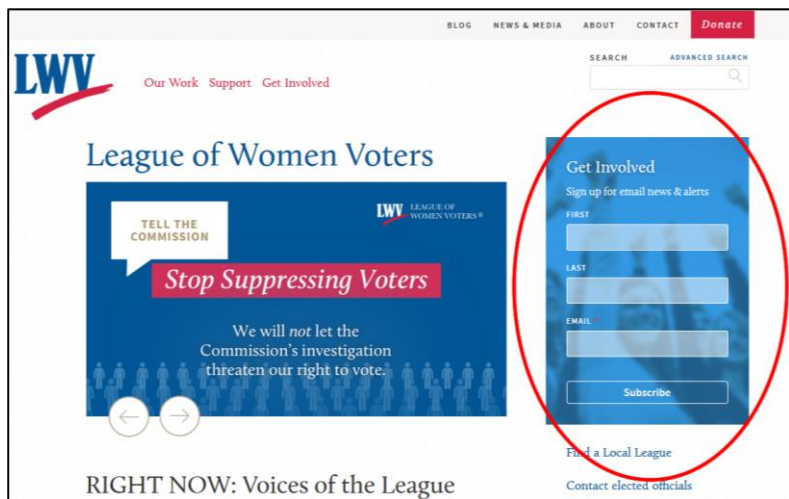


# Integrate communications to avoid confusion and save time

MONTH	Acquisition	e-Acquisition	Appeals	e-Appeals	Renewals	e-Renewals	Sustainers	Online Sustainers
Jan-17	A0117 January Acquisition 1/11/17				R0117 Renewal #1 1/24/17	REA17 e-Renewal #1 1/31/17		
Feb-17		AEA17 Feb e-Acquisition (two emails) 2/16 and 2/23					S0117/S02117 Sustainer Invite/Reinstate TM 2/14/17	
Mar-17	A0217 March Acquisition 3/13/17				R0217 Renewal #2 3/09/17	REB17 e-Renewal #2 3/13/17		March Sustainer Email Invite (3 emails + Upgrade) 3/17, 3/24, 3/30
Apr-17			C0117 Appeal #1 4/6/17	CEA17 April e-Appeal 4/14/17	R0317 Renewal #3 4/6/17	REC17 e-Renewal #3 4/6/17	S0317/S0417 Sustainer Invite/Upgrade TM 4/25/17	
May-17	A0317 May Acquisition 5/16/17			CEB17 Membership Month e- Appeal Series (6 emails) 5/5, 5/12, 5/17, 5/22, 5/26, 5/30	R0417 Renewal #4 5/4/17	RED17 e-Renewal #4 5/1/17		
Jun-17		AEB17 June e-Acquisition (two emails) 6/14 and 6/21	C0217 Appeal #2 6/13/17		R0517 Renewal #5 6/8/17	REE17 e-Renewal #5 6/9/17		
Jul-17	A0417FSC July Acquisition 7/11/17		C0317 Appeal #3 7/13/17	CEC17 July e-Appeal (two efforts) 7/20 and 7/27	R0617 Renewal #6 7/6/17	REF17 e-Renewal #6 TBD	S0517FSC Sustainer Invite TM 7/25/17 3.1M	
Aug-17		AEC17 Aug e-Acquisition (three emails) TBD	C0417 Major Donor Invite 8/15/17					August Sustainer Email Invite (3 emails + Upgrade) TBD
Sep-17	A0517 September Acquisition 9/12/17		C0517 Appeal #4 9/7/17	CED17 September e-Appeal Vet Care Send date: TBD				
Oct-17			C0617 Appeal #5 10/5/17	CEE17 October e-Appeal Farm Maint.			S0617/S0717/S0817 Sustainer Invite/Reinstate/Upgrade TM 10/24/17	
Nov-17	A0617 November Acquisition 11/8/17		C0717 Year End Appeal 11/7/17					November Sustainer Email Invite TBD
Dec-17			C0817 Year End Follow Up Appeal 12/5/17	CEF17 Year End e-Appeal Series (8 emails) TBD				

## Attract site visitors with user-friendly sign-ups and website promotions

- Ask for appropriate information and limit what you require
- Splash pages bring attention to urgent campaigns and can be used for email collection



# Collect email everywhere

 **AMERICAN FORESTS**

☐ YES! I want to help American Forests build on the achievements of the past year and get a running start on 2014 with a generous year-end, tax-deductible contribution of:

☐ \$HPC   ☐ \$1.5HPC   ☐ \$2HPC   ☐ Other \$ \_\_\_\_\_

Name Lastname \_\_\_\_\_  
 Address #1 \_\_\_\_\_  
 Address #2 \_\_\_\_\_  
 City, ST 00000-0000 \_\_\_\_\_

Ref Code #: Source Code  
 XXXXXXXX

☐ Please send the latest news from American Forests to my inbox.  
 My e-mail address is: \_\_\_\_\_

Please make your check payable to American Forests, or turn over to charge your contribution.  
 You can donate online, too, at [www.americanforests.org](http://www.americanforests.org).  
 Your gift is tax deductible to the full extent of the law.  
 Thank you!

1220 L Street, NW, Suite 750, Washington, DC 20005

☐ Please send the latest news from American Forests to my inbox.  
 My e-mail address is: \_\_\_\_\_

☐ Other \$ \_\_\_\_\_

**Get the results of the 2017 Membership Survey delivered right to your inbox.**

Provide your email address to receive the results of the 2017 Membership Survey delivered right to your inbox.

Please make your check payable to American Indian Siyeh Education Foundation. To donate by credit card, see the website at [www.AmericanIndian.si.edu](http://www.AmericanIndian.si.edu) or call us toll-free at 1-800-242-NM.

Special contribution in the envelope provided.

NAME \_\_\_\_\_

☐ \$20   ☐ \$25\*   ☐ \$35

**IMPORTANT IMPORTANT IMPORTANT**  
 Please complete your e-mail address to receive the results of the 2017 Membership Survey delivered right to your inbox.

E-MAIL ADDRESS: \_\_\_\_\_

☐ I have enclosed my check payable to the League of Women Voters.  
☐ Please charge my contribution to my: ☐ American Express



# Maximize lead generation and drive traffic

- List chaperones
- Email appends
- Petition-based sites
- Social media/  
digital ads
- Retargeting

The Trustees  
Sponsored  
We love Massachusetts' nature. Join our extended family of friends across the state.

attach gutter shed

ASPCA  
60¢ WON'T BUY MUCH THESE DAYS... but for 80¢ A DAY you can help rescue animals in distress.  
Make a Monthly Gift

OUT OF SIGHT. OUT OF MIND.  
Nobody likes seeing animals suffer. But you can help heal their pain and fight cruelty for 60¢ a day.  
ASPCA  
Make a Monthly Gift

Sign Up



# Roll out the welcome mat to engage immediately after sign up

- Week 1 – Welcome email (thank you for joining, like us on social media, send an e-card, visit our Action Center)
- Week 2 – Take the quiz and watch this video
- Week 3 – Action alert
- Week 4 – Acquisition ask
- Week 5/8 – Sustainer ask



## Apply the same good fundraising disciplines as other channels

- **Define the universe**
  - *Segmentation – who are you emailing?*
- **Define the program strategy**
  - *Case for giving*
  - *Call to action*
  - *Ask string(s)*
  - *Technical/functionality*
- **Define creative/copy most appropriate for online**
- **Define your tests**




Wed 8/2/2017 10:02 AM

Barbara J. Erickson, Trustees <bjerickson@thetrustees.org>

It's time to renew!

## Anatomy of an email

- Envelope information
- Ask and case for support
- Landing page



**Renew Your Trustees Membership Today!**


Renew Your Trustees Membership by Wednesday, August 9 and you won't receive a renewal notice by mail all year!

YES! I want to renew my support for The Trustees and reaffirm my commitment to protecting the most cherished landscapes across Massachusetts. To ensure our special places are always protected, cared for, and shared, I am renewing my Trustees membership with a generous contribution of:

### Select a Membership Level

Single \$47	<b>Selected level: Family</b> Annual dues: \$67
Single (Senior/Student) \$37	
<b>Family \$67</b>	
Family (Senior/Student) \$57	
Contributing \$125	
Supporting \$165	

- Two adults ages 18–64 and children or grandchildren (up to 18 years old).
- Income tax deduction: \$67
- Free or discounted admission for two adults and family to all reservations.
- 20% off regular Crane beach admission.
- Opportunity to purchase two Crane Beach Parking Permits.
- Quarterly issues of our award-winning Special Places magazine.
- Property guide book.
- Discounts at two unique B&Bs and two campgrounds.
- Discounts on hundreds of events and programs.



**Renew Your Trustees Membership Today!**

Renew your Trustees membership online by Wednesday, September 13 and you won't receive a single renewal notice by mail this year.

Dear Friend,

I want to thank you for your committed support for The Trustees! Your generous gifts have helped us permanently protect, care for, and share more of our state's special places for the benefit of people across Massachusetts.

As a Trustees member, you make possible new initiatives like our demonstration kitchen at the Boston Public Market.

When you invest in The Trustees, you invest in the quality of life for your family and families across the Commonwealth. And now we need your help to keep our momentum going, so we can safeguard more of our state's irreplaceable landscapes and landmarks and connect more people to nature, our shared history, and each other.

That's why I want to let you know that your Trustees membership is about to expire – and ask you to [renew it with a generous contribution right now](#).

When you renew, you'll get another year of the unique and valuable benefits available only to Trustees members, including FREE or discounted admission to every Trustees property; discounts on hundreds of events and programs; a year's subscription to *Special Places*, our award-winning member magazine; and more. And when you renew, you can receive your 2017-18 Crane Beach Parking Permit for \$75. That offers a full year of free beach access!


And, to sweeten the deal, if you [renew your Trustees membership online by Wednesday, September 13](#), you won't receive any paper renewal notices all year!

Of course, what you will receive is the great feeling of knowing that you are creating more opportunities for people of all ages to experience Massachusetts' beautiful natural areas, priceless cultural treasures, and working agricultural lands.

The Trustees are working every day to make sure our properties are more beautiful, accessible, and engaging every time you visit, and to share them with more people in communities around our state. But we can't do this important job without you.

[So please, renew your Trustees membership today](#). Thank you for your commitment to The Trustees and to the places and experiences that make Massachusetts so special.

Sincerely,

  
Barbara J. Erickson  
President & CEO

**RENEW NOW**

# Craft an appropriate message for the audience, the time, and the need

- Test messaging style, tone, written vs. video, humor, etc.
- Get to the point
- Think campaigns, not email blasts



Fri 1/27/2012 9:30 AM  
James Carville <info@dsc.org>  
**Bacon**

To: Amy Padre

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

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**JAMES CARVILLE**

**Democratic Senatorial Campaign Committee**  
*Committed to Keeping a Democratic Majority in the Senate*

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Amy,

Every once in a while, someone asks you to make a decision. "Paper or plastic?" "Ford or Chevy?" "Bacon or sausage?"

**Well, now I'm asking you to make a decision.** Are you gonna let Republicans take over our country in 2012? Or are you gonna stand with me, President Obama, and the Democrats who want to pass his agenda and get our middle class up off the mat?

This is not a "later" decision. This is a "now" decision. Because if we don't act, we'll end up with Newt Gingrich and the Tea Party making all the decisions – and you and I might as well spend our time playing Parcheesi, because Democrats won't be able to do a

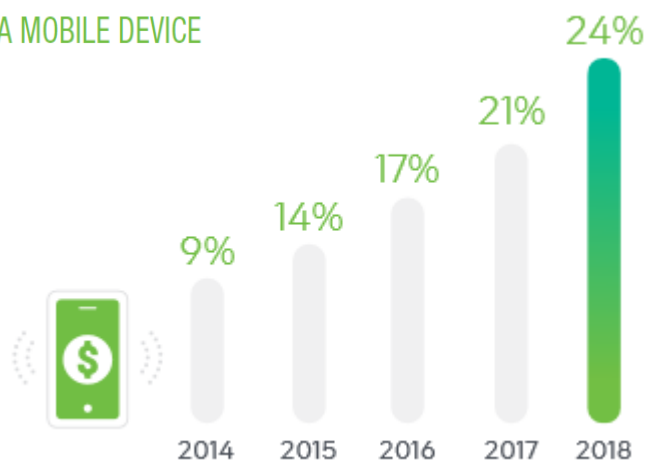
**IT'S DECISION TIME**  
**WHO WILL YOU STAND WITH?**



## Make it easy for your supports so they will stay engaged

- Seamless transition from email to landing page and between channels
- Responsive design should be used for email templates and donations forms

PERCENTAGE OF ONLINE DONATIONS MADE ON  
A MOBILE DEVICE



Source: Blackbaud 2018 Charitable Giving Report

Verizon LTE 11:57 PM 94%  
my.democrats.org

**HELP DEMOCRATS TODAY**

Unlike our opponents, we don't take money from special interests, corporate lobbyists, and political action committees.

What we have is supporters like you. Join us by making a donation today.

== CONTRIBUTOR ==

First Name

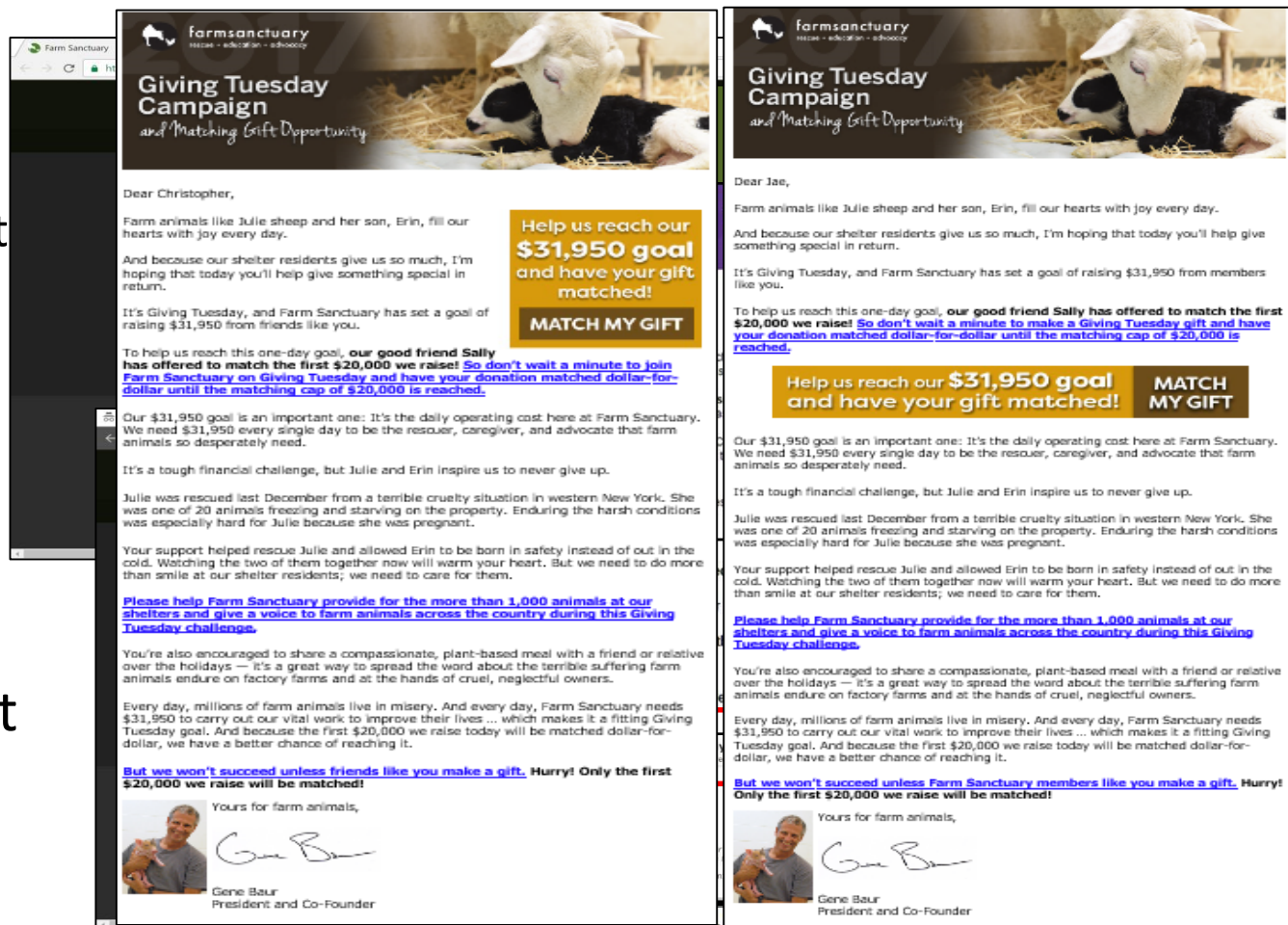
Last Name

Address




# Testing, test, and then test some more!

- Countdown clock
- Donation form layout
- Personalization (name, geo-location)
- HTML vs. text
- Callout placement
- Ask string order
- Other ideas: happy vs. sad image, message length, signer, send day




# Cultivate, engage, and educate to keep supporters close to your mission



Ocean Conservancy®  
Start a Sea Change


OCEAN ACTION NEWS

NOVEMBER 2011




[We want to thank you](#), not just for what you do today, but for what you do every day. Our ocean is better because of you. We hope you enjoy this video we put together to express our gratitude this holiday season.

WATCH VIDEO



**1 MONTH, 1 MINUTE, 1 THING.** This month, we're giving you a fun way to track your trash to help you make simple behavior changes and keep trash out of our ocean.

LEARN MORE







**PHOTOGRAPHY CONTEST.** Our photography contest is back and better than ever. Want to see your work featured in the Ocean Conservancy calendar? Submit today!



SUBMIT NOW


GIVE OUR OCEAN A VOICE

Click below to share this month's message with your friends.

 I'm thankful for our ocean, and for everyone who helps support it. 


 A video message of thanks from @OurOcean: <http://bit.ly/tVKyyX> 






### SNAP Matters: The Road to Stability


Hear from Stephanie H., a single mom who was able to navigate the road to financial stability with the help of SNAP. The SNAP program, formerly known as food stamps, is vital to hunger-relief efforts across Maryland and the country. [Read her story »](#)





### Set Up For Summer

Summer vacations have begun, and while school-based meal programs for food-insecure kids are also on break, our Summer Clubs are ready to tackle the issue of summer hunger. [Learn more »](#)



### Doing GOOD

See how the BOYS in the GOOD after-school program is rallying around the fight to end hunger by hosting food and funds drives at their Randallstown school. [Read more »](#)

SUPPORT OUR PROGRAMS



# Invite interaction. Ask supporters to give feedback, share content, or take action



Dear Amy,

As a dedicated national parks supporter, you play a key role in NPCA's work to build a strong national parks legacy for future generations. [That's why I'm asking for your help today.](#)

Even as the National Park Service centennial approaches, our national parks face many serious challenges:

- Chronic funding shortfalls
- Efforts to limit the president's ability to protect our national treasures under the Antiquities Act
- Ongoing threats from reckless development and off-road vehicle misuse



[We need your input on our parks' future today!](#)

[Take the Survey](#)

This leaves all of us who love our parks facing some pretty difficult questions:

Will visitor experiences at parks like **Yosemite** and **Everglades** National Parks suffer from crumbling infrastructure, staff shortages, and closed trails and campgrounds?

Will off-road vehicle use and other harmful activities destroy the scenery and serenity of precious places like **Yellowstone** and the **Grand Canyon**?

As someone who loves the parks and makes NPCA's work possible, [you can help us get the right answers to those questions by taking our 2016 Parks Supporter Survey before the February 20 deadline.](#)

Your responses to the survey will help us chart a successful course to ensure our parks' future and give us critical input so we can hone our action plan to secure adequate funding for our parks ... combat unwise development and other serious threats ... and strengthen our parks' heritage for the Park Service's 100th anniversary and beyond.

[The survey will only take a few moments of your time.](#)

Thank you for sharing your input and everything you do to protect the parks!

Sincerely,

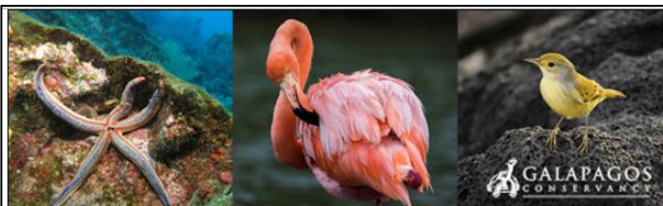


Theresa Pierno  
Chief Operating Officer

P.S. With our parks at a critical crossroads, I'm counting on your ideas and opinions to help us chart our course for the year ahead and beyond. [Please take the 2016 Parks Supporter Survey now](#) before the February 20 deadline—thank you!

[Take the Survey](#)

Photo: Yellowstone National Park © mariocono/StockPhoto.com



## WANTED: YOUR GALAPAGOS PHOTOS!

Dear Amy,

The 12th Annual *Galapagos Digital Photo Contest* is now open for submissions! We invite you to enter up to five of your best photos of Galapagos wildlife and scenery for a chance to have your image featured in the beautiful 2017 Galapagos Conservancy calendar. One grand prize winner will also receive a Galapagos gift pack valued at \$100, along with their photo on the cover of the calendar!

The submission deadline is **midnight (ET) on Monday, July 25th**. Entering the contest is easy:

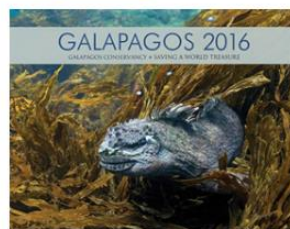
- Email up to five photos individually (one per email) to [photo@galapagos.org](mailto:photo@galapagos.org).
- Include your **name** and **photo title** in the subject line, and include your full name, mailing address, and a brief description of the photo (e.g., location) in the body of the email.
- Make sure that all photos are at least 2,000 pixels wide, greater than 2MB, and in JPEG format. Horizontally-oriented images are preferred.

[View the complete contest guidelines.](#)

Galapagos Conservancy will select 12 winning photos to be featured for each month of the calendar, including the grand prize-winning cover photo. An additional 25-35 photos will be selected to appear as small details throughout the calendar.

Winners will be notified in September, and the calendars will be available to order in October. View last year's winning photos [here](#).

We look forward to seeing Galapagos through your lens!



[SUBMIT PHOTOS](#)



Dear Michael,

I need your help making a fun and important decision.

We're almost ready to send our new National Parks Conservation Association 16 month calendar to the printer. But the important matter of which great photo of America's national parks will appear on the cover hasn't been decided ... yet!

That's why I'm inviting you to [cast your vote now for one of the finalists](#) ...



[PICK YOUR FAVORITE!](#) [VOTE NOW](#)

All I ask is that you [please vote right away ... before midnight on Monday, April 28 at the latest](#). That's when we have to make a decision so printing can begin.

Our calendar is a great way for you and many others to see just a few of the national parks that we work to protect every day.

Thanks for helping us with this, and for all you do to support our work together to protect our national parks.

Sincerely,



Deborah Ward  
Membership Manager

P.S. [Cast your vote for NPCA's new calendar cover now](#) and I will be sure to let you know the winning choice after the votes are counted on April 28. Thanks again for your help!

After you vote, please [share this with your friends on Facebook](#) and [Twitter](#) so they can vote, too!

# Thank your supporters early and often for their time, energy, donations, and more



Dear Loyal Conservancy Supporter,

No matter how you spend your holiday season, I want to take a moment to share a **world of thanks** to **supporters like you** on behalf of The Nature Conservancy!

**Watch this video** to hear from Conservancy staff working hard to protect some of the most beautiful places in your community and around the world.

Take the Amavon Islands for example, one of the Coral Triangle's biggest Hawksbill sea turtle nesting sites. This area has witnessed a 200 percent increase in Hawksbill sea turtles in the last two decades thanks to Conservancy scientists, community conservationists and supporters like you.

**Thank you for your commitment to our natural world** and for all you do each and every day to advance conservation around the world.

Happy Thanksgiving,

Amy Hawthorne Morris  
Sr. Online Outreach Manager  
The Nature Conservancy



## Thank you for changing lives

[Watch the Video](#)

Barb, with Thanksgiving approaching, let us take a moment and thank you for your dedicated support and determination to make a difference for everyone affected by MS. Together, as this video shows, we are making an impact and people living with MS are moving forward.



When someone is diagnosed with MS, it changes their life — and the lives of those closest to them. They need information, connections with people who understand what they're going through, and the very best treatments available.





## Track, measure, and analyze your metrics to inform future strategies

- **Website:**
  - Conversion rate – sign ups, donations, actions
  - Exit pages
  - Path and time on site
  - Mobile traffic
- **Emails:**
  - Open rate
  - Click-through rate
  - Response rate
  - Average gift
  - Delivery and bounce rates
  - Unsubscribe rate



# Analyze and benchmark against the industry and your own results

EMAIL METRICS QUICK REFERENCE										
METRIC	Type of Message	All	Cultural	Environmental	Health	Hunger/ Poverty	International	Public Media	Rights	Wildlife/Animal Welfare
OPEN RATE	Advocacy	15%	—	16%	14%	—	13%	—	15%	17%
	Fundraising	15%	23%	15%	13%	20%	13%	15%	14%	16%
	Newsletter	17%	25%	17%	16%	19%	15%	19%	16%	19%
CLICK-THROUGH RATE	Advocacy	2.5%	—	3.1%	1.2%	—	2.0%	—	2.1%	4.9%
	Fundraising	0.42%	0.58%	0.39%	0.40%	0.47%	0.35%	0.44%	0.33%	0.70%
	Newsletter	1.4%	2.4%	1.8%	0.9%	1.2%	0.6%	1.6%	0.9%	2.5%
PAGE COMPLETION RATE	Advocacy	76%	—	78%	70%	—	69%	—	76%	78%
	Fundraising	17%	11%	18%	16%	28%	20%	19%	11%	16%
RESPONSE RATE	Advocacy	2.2%	—	2.4%	1.3%	—	1.7%	—	1.8%	3.8%
	Fundraising	0.06%	0.07%	0.06%	0.04%	0.08%	0.07%	0.05%	0.04%	0.09%
AVERAGE GIFT	One-time	\$95	\$109	\$63	\$91	\$180	\$141	\$112	\$94	\$72
	Monthly	\$23	\$31	\$19	\$31	\$28	\$31	\$14	\$18	\$22

## Check out these industry resources for tips, ideas, and insights

- eNonProfit Benchmark Study (M+R and NTEN)
  - <http://mrbenchmarks.com/> - *2018 preview available now, full report out soon!*
- Blackbaud Luminate Online Benchmark Report
  - <http://hi.blackbaud.com/luminate/>
- Nonprofit Technology Network
  - <http://www.nten.org/>
- NPEngage
  - <https://npengage.com/>



# Thank You!

**Barb Perell**

**Vice President of Marketing**

Avalon Consulting Group

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[barbp@avalonconsulting.net](mailto:barbp@avalonconsulting.net)