Expanding your donor management with Salesforce and engagement marketing

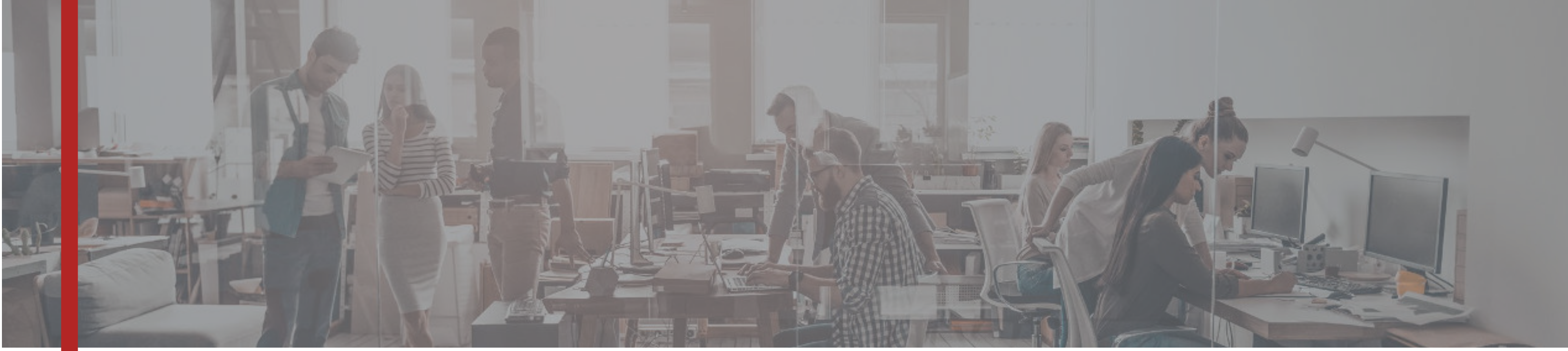
Thank you

You send this message to your donors after every interaction, and it's one of the most important things your nonprofit can do. Donors, after all, are your lifeblood. Without their support and commitment, your organization would struggle to exist.

Yet while saying thank you is essential, it is a reactionary strategy at a time that demands a proactive approach.

According to the National Center for Charitable Statistics, there are nearly 1.6 million nonprofits in the United States, all striving to be noticed and supported by would-be donors. Standing out and effectively managing donors amid so many competing nonprofits requires a proactive approach fueled by the power of marketing automation.

Throughout the pages of this eBook you'll find tips to guide your donor management with marketing automation. You'll see how Salesforce and Pardot can keep you top of mind among your most important constituents while saving your team and your donors precious time.



Understanding Your Donor Base

Identifying donor segments and donor types is a practice most nonprofits adhere to. You may already know your donor segments and types instinctually; however, your goal now is to help your engagement marketing automation system know this as well.

Big donors for capital campaigns need and want to be engaged differently than smaller, more frequent donors, who are different again than in-kind donors. Some large capital donors, for example, may wish to remain anonymous but still want to be informed of the impact of their gift. Meanwhile, small donors and volunteers may want to know about opportunities and the effect of local campaigns.

Your donors may also be other companies that want to enjoy the tax break and promote their company culture's positive social impact.

Pardot can handle each of these scenarios with ease if it knows how to tell the difference. That leads us to your donor segmentation strategy.

ADVANTAGES OF EFFECTIVE DONOR MANAGEMENT

Effectively manage your donors and you'll know more than just their scores and grades. You'll also understand how they want to communicate and the amount of money/time they are comfortable giving. This streamlines your efforts and ensures your messaging is always appropriate.

SCORING & GRADING DONOR SEGMENTS

Let's start with the basics. What's the difference between a score and a grade?

- Score: Indicator of how engaged the person is with your organization
- Grade: Rating based on how well the donor matches your ideal donor profile

Every donor's score is based on how they interact with your content — including emails, blogs, invitations to subscribe and thank-you notes. The grade is based on the information you have on the donor in your Salesforce system.

Adding these grades or scores to prospective donors in your Salesforce system can save your organization — and your donors — time by allowing you to focus on those with high grades and scores. These are the people that want to interact with you.

By the same token, bounce and unsubscribe rates collected in Pardot can show you who isn't a viable contact.

Using this information, you can hone your donor list and manage your donor triggers in Salesforce. When someone fills out a contact form, their score rises and so too should your interest in them. This ensures you spend more time connecting with those who are passionate about your cause and less time on those who aren't.

Maintaining Ongoing Correspondence

In section one we covered cataloging your donor base and scoring them while building their profiles. Now let's move on to section two, establishing ongoing correspondence.

Using the information collected in your Salesforce database, you can now enter current and prospective donors into email nurturing campaigns utilizing Pardot. You can also create Dynamic or "smart" lists that automatically add or remove prospects based on the criteria you set, such donor type, demographic markers or giving history. Start with a welcome email and personalize it based on past donation amounts. In the case of larger donors, a phone call may be more appropriate. Impact stories are a wonderful piece of content to include along with your thank-you email.

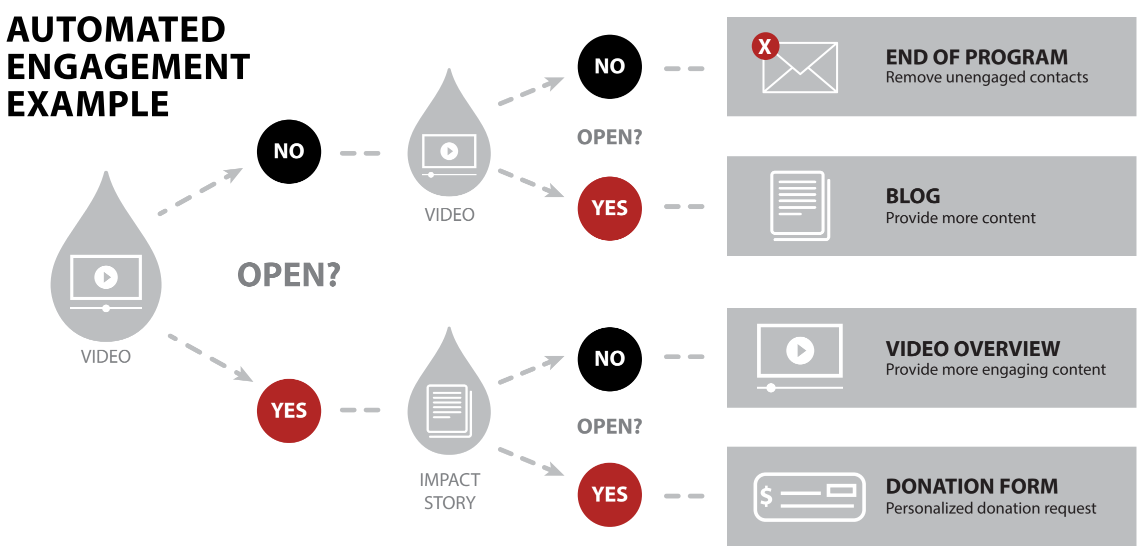
Once you pass this initial step, Pardot's Engagement Studio makes it easy to establish regular communication patterns. You can also institute uniquely customized individual emails into the campaign to trigger every time a contact completes an action or tag — such as interacting with your content and/or filling out a form — as we discussed in section one.

ENSURING BEST RESULTS FOR ONGOING CORRESPONDENCE

As contacts work their way through your email nurturing campaign, this is a great opportunity to support the emails you are sending with additional content. Linking to blogs or webinars that relate to the subject matter of the email is a great strategy. This allows them to learn more about your organization's efforts and how they can support it. It also gives you more insight into how interested the donor is. Are they engaging with the content you send them?

When it comes time to ask for their continued support, you can personalize your ask based on the target's previous interactions with your content and email drip campaign. Frame your ask around the things they were passionate about and they'll be more apt to pledge their help.

Finally, if you've noticed a target with a high score and/or grade is unresponsive to your email marketing efforts, this is a good time to send them a "we miss you" email to see if you can bring them back.



Obtaining 360-degree Visibility to Your Donor Management

You've established your donor base and kept in contact through email nurturing campaigns. Now let's look at the other ways in which you can establish total donor management.

BE CREATIVE AND VARIED IN HOW YOU CONNECT

You can start by setting reminders in Salesforce to connect with your donors and would-be donors at important times. These reminders could center around a big event happening within your organization, a holiday or a time that matters to the donor and you — say the anniversary of their first donation or volunteer effort. These connection opportunities are also a wonderful time to include special offers or invitations to previous donors as rewards. It's another chance to say thank you and give them something of value. After all, everyone wants to feel like a VIP.

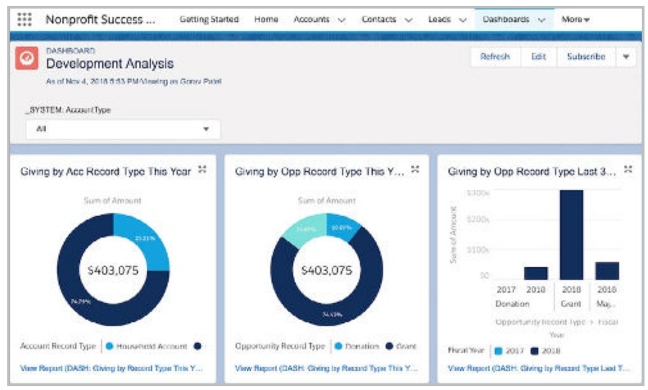
UTILIZE PARDOT

Yes, it's more than just an amazing email tool. Pardot also can help you manage your events via its built-in connector with Eventbrite. How's it work? When attendees register or check in or a new event is created, these actions will trigger responses in Pardot. This could include creating or updating the prospect, adding the prospect to a new list or starting an email nurturing campaign.

And then, once the event is done, you can use Pardot to track all relevant report data from the event. This will provide your team with invaluable insights you can use to make your next event even more successful.

SALESFORCE DASHBOARDS ARE THE FACE OF DONOR MANAGEMENT

Your Salesforce dashboards are your command central for all your marketing automation initiatives. They provide you insight into your campaign's engagement and individual donor activity. You can use your dashboards to monitor individual donor activity, revealing patterns of events or programs attended. You can also use this information to adjust course if you see a tactic is especially successful with a class of donors.



Finally, here are a couple of tips to ease your dashboard use.

- Use dashboard filters to hide information you don't want to see
- Set a scheduled refresh on a date that works for you (Monday morning?) to capture a snapshot of the health of your initiatives each week
- Check out Salesforce's "Getting Started With Volunteer Management" for tips that can be applied to several aspects of your nonprofit

Finding Support When You Need It Most

Your Donors Are Vital

Yes, your donors are vital to the health of your organization, but with nearly 1.6 million nonprofits spread across the country, their support can be spread thin. Your challenge is to make that connection and nurture it. Marketing automation can do that by providing you an efficient, effective way to communicate with your current and would-be donors while measuring which initiatives are effective. You'll be issuing far more thank-yous if you first focus on reaching out and saying hello.

If you're interested in learning more about how marketing automation and Salesforce can support your nonprofit, Redpath can help. We are a Salesforce Impact partner that has worked with over 300 enterprise, mid-size, and nonprofit organizations since 2008. Contact us today to learn how we can put the power of Salesforce to work for you.

Redpath simplifies and accelerates transformational change, empowering you to focus on your organization's mission.

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