The Nonprofit Guide to Effectively Engaging Your Constituents

The Tools, Tech, and Tactics to Succeed at Scale

Introduction

Congratulations on completing your marketing health assessment! As you can see, there is a lot that goes into a successful marketing program, and regardless of where you currently stand, you now know your point A and are about to dive into an absolutely awesome guide that will help you get to point B, whatever that is for you.

Assessment Summary

Below, you will find a recap of what was covered in the assessment, plus robust, insightful, and highly actionable recommendations you can use to level up your marketing in all four of the areas we measured.

It's a long guide, to be sure. But the good news is that you can review the guide in sections. This will allow you to revisit it time and again to improve your marketing and, ultimately, your organizational outcomes.

Assessment Area:

Full Funnel Marketing Strategy

In this section, we reviewed the following elements to assess your full funnel marketing strategy:

- Channel diversity
- Email strategy
- Exit and entrance criteria per funnel level
- Content types

Recommendations:

1. Define Funnel Stages:

- Start with definitions for top, middle, and bottom of the funnel. This can be simple or complex, depending on your needs.
- **Top of Funnel:** Define as someone who is unaware of your organization or does not fully understand your mission.
- **Middle of Funnel:** Define as someone who knows what you do but needs to better understand your impact and why they should be affiliated before taking their next action, such as donating, becoming a member, joining your email list, or signing a petition.
- **Bottom of Funnel:** Define as someone who has shown clear interest in becoming involved with your organization in some way. These individuals may have visited your donation or membership sign-up page, subscribed to your newsletter, or signed a petition. They are ready to get on board with your mission but need a bit more nudging or education to make the leap.

2. Measure Funnel Stages:

- Figure out how to measure where a constituent is in their journey and if you can automatically shift the content a person receives based on their funnel level.
- For example, if someone has visited your Mission or Vision page or read a case study, they are no longer at the top of the funnel. Instead of sending them basic content, provide deeper insights to further connect them to your organization.

3. Utilize Tools for Personalization:

- Use Google Tag Manager and Google Analytics to track page visits and tag users accordingly. If your email marketing tool integrates website engagements, segment users by the pages they have visited to move them through your funnel.
- Employ Google Search Console to understand how constituents find you or use Google Ads Keyword Planner to identify demand for information, enabling you to create engaging content that aligns with their funnel stage.

4. Content Creation and Channel Selection:

- Create at least two quality pieces of content for each funnel level, providing multiple ways for your audience to engage and learn more.
- Monitor your web analytics to determine if your content resonates with your audience by evaluating metrics like time on page, bounce rate, and exit pages.
- Choose three channels to pursue (including email). Focus on organic social media, email, and organic search or SEO. Don't forget to leverage the Google Ad Grant if your nonprofit qualifies.

5. Email Strategy:

- Create three emails per funnel level to educate constituents about your organization and provide links to more in-depth content such as reports, ebooks, etc.
- Track whether recipients click the links in your emails to gauge their engagement level and determine their funnel stage.

6. Social Media and SEO:

- Post weekly on social media with content tailored to each funnel level, keeping your entire audience engaged regardless of their current stage.
- Conduct SEO research to understand what content will support your top and middle funnel efforts. Use tools like SEMrush, Screaming Frog, MOZ, or the Google Ads Keyword Planner to identify valuable content topics. Apply on-site SEO and share these pieces on social media.

Next Steps

1. Chart Your Progress

- Use tools like LucidChart or Miro to create a plan, including strategy and tactics, ensuring a clear vision for your goals, tasks needed to achieve them, and a way to track progress. Both Lucid and Miro offer free accounts for initial use.

2. Iterate and Improve:

- Give yourself time to complete this work. Remember, you don't need everything to be perfect to start seeing better results from your marketing efforts. Mixing up your emails and adding more educational content with solid internal linking on your website can provide a significant boost.
- Regularly revisit your plan, pat yourself on the back for improvements, and set new focus points for each section. Marketing is an ongoing process, and continuous improvement is key to success.

By following these recommendations, you will be well on your way to creating a robust full funnel marketing strategy that drives engagement and supports your organizational goals.

Assessment Area:

Tracking Constituent Journey

What We Evaluated:

- Scoring Model
- Lifecycle stages and lead status
- Access to behavior and engagement data
- Criteria for engaged or disengaged

Forecasting or revenue operations can be seen as an icky word for nonprofits, but, at the end of the day, you do need to drive revenue to fulfill your mission and continue to operate. It is for this reason that this guide will cover why tracking your constituent is necessary for personalization and marketing effectiveness and for helping to predict revenue ebbs and flows.

Determine Your Scoring Models:

1. Basic and Advanced Scoring:

Basic scoring allows you to judge who is engaged or not on an email list or within your database or CRM. Advanced scoring tracks specific types of marketing engagement and uses that to build scoring around the likeliness of someone to give during an upcoming campaign or to renew a membership.

For example, let's say you are a membership organization and have events. You can score someone based on how many events they have attended overall and compared to previous periods. If the member has a low score, you can add that person to a list for personal outreach to encourage renewal. When building reports and forecasts, you can look at the percentage of members who have less/lower engagement and gain insights into what your likely churn rate of members might be.

A scoring model could include giving activity only, giving activity plus marketing activity, or marketing activity only. For example, if someone never opens any of your donation appeals, they are less likely to open the next one and give compared to someone who opens all or half of them. Another example would be scoring people based on how much they read your blogs, reports, updates, etc. If someone is very engaged, they are staying up-to-date on your impact and are more likely to give than someone who is not.

Scoring can be very simple as well. You can score based on overall engagement and lack thereof. If someone has not opened an email in three months, maybe don't send them every email that goes out. This can help to meet your constituents where they are. If email opens or website visits start to tick up, then you can start to send more emails and appeals again.

Determine Your Lifecycles and Lead Stages:

1. Tracking Journey:

Lifecycles or lead stages reflect where a constituent's relationship with your organization is at and can be highly personalized. Your lifecycle may look something like: Contact > Subscriber > Donor/ Member > Past Donor/Member, etc.

Lead statuses are different and pertain to a set period where you aim to encourage a constituent to complete a particular action. For example, if someone is a donor already and you are seeking to get this donor to sponsor an event, their lifecycle stage may stay the same while their lead status would update according to where you are in the process of enrolling them as a sponsor.

In this example, your lead statuses may look something like this: Attempting > Meeting Booked > Interested/Not Interested > Reviewing Options > Committed. These are different from deal or transaction stages, which pertain specifically to your process of enrolling sponsors, but those two things can interact as well!

2. Marketing Outcomes and Revenue Forecast:

You can use both lifecycle stages and lead statuses to drive marketing outcomes as well as forecast revenue. For example, if you have a drop in people in the Donor/Member lifecycle stage or an increase in people in the Past Donor/Member stage, then you can predict your revenue. Similarly, if you look at lead status for a particular appeal or ask and look at your pipeline of opportunities, you can start predicting how much revenue you are likely to bring in from a particular event.

- This is important for tracking the health of your organization, determining where to direct resources, and seeing where you have room to improve. All of these stages and statuses should be in reports so that you can understand where your constituents are in their relationship journey with you.

Consider Access to Behavioral and Engagement Data:

1. Reports and Dashboards:

Access to behavioral and engagement data is critical and should be available in many ways. You want to see reports and dashboards that give you a high level of where you are and how you are trending. For example, has your email open rate gone up but your click-through rate down? Are more forms being abandoned this month? Is donation page traffic up? All of this will help with your marketing and revenue predictions.

You also want to have a granular look. For instance, perhaps Joe Smith has been a member for 10 years and has donated regularly for the last seven years. Let's say that Joe's event attendance or donations are down. Being able to look at Joe's record in your CRM and/or Marketing Automation Platform (MAP) will allow you to better understand how Joe is interacting. You can see what emails he is opening, if any, what landing pages he is visiting, if any, and if he is considering your events or not. Based on what you see at this granular level, you can plan personalized outreach.

Consider Engagement and Disengagement Criteria:

1. Using Scoring and Statuses:

Scoring can tell you if someone is engaged or not. If they are not engaged, you can change what you market to them and how, or you can decide on a one-to-one outreach plan to reengage your constituents.

Changing lifecycle stages or lead statuses will also convey engagement. You can use the current status of these fields or recent changes to put someone into an "engaged" or "disengaged" list of constituents and then make a plan of action from there.

- Once you have that list, you can look at dashboards to understand what your most and least engaged constituents have in common. From there, you can make plans to improve engagement.

Tracking your constituents' journeys can be basic or advanced. Depending on where you currently are, chart a course based on the bullet points outlined for you above and get started! As always, remember to chart and document!

Assessment Area:

Marketing Automation, Personalization, and Segmentation

What We Evaluated:

- Engagement lists
- Behavioral and demographic lists
- Personalization and segmentation based on lists
- Smart content based on lists

When you use marketing automation to segment our audiences via lists and automatically set property/field level values, you allow your strategies to shine.

When you use those lists and properties to automatically deliver unique versions of emails, landing pages, and CTAs, you allow your strategies to scale.

Overview of Automation Basics:

1. Criteria Definition:

- You need to have criteria defined within your full funnels if you want to use automation. Otherwise, what would you use to drive our automation?

- You need to know what your segmented email strategy is, what your channels are, and what your content delivery plan is to drive your automation.
- You need to be able to stitch all of this together on a chart or diagram to execute and manage this strategy.
- You need to track performance to drive those automations. Scoring, lifecycle stages, lead statuses, behavioral and engagement data, and lists are what you use to drive your automations.

2. Starting with Automation:

All too often, organizations start with automation first, and that just doesn't scale. Eventually, your automations will conflict with one another, and your campaign delivery and data management will become a mess. There won't be a well-defined plan to look to when that happens.

Automation Uses:

1. Delivering Assets:

Delivering assets with automation is the simplest form of automation. For example, if you sign up for an ebook and it comes to your email immediately, that is automation. When you donate and get a "thank you" email or text right away, that is automation.

This is a level of automation that is low-hanging fruit for most nonprofits. Even though this is a very simple form of automation, if it is not well-managed, it can still get out of control. For example, if you have an email that sends the ebook, a "welcome to our list" email, and a current campaign email, you may bombard your new subscriber and make them unsubscribe just as quickly as they signed up.

You can get around this by diagramming/charting your plans and ensuring that you have exclusions set up for your email automation workflows to prevent multiple sends in a single day.

2. Content Delivery and Automation:

When you have great criteria in place, your content delivery can level up as well. We all know that we typically send multiple emails once someone signs up, be it for your general email list or a specific asset. Rather than just continuing to send a series of the same five emails no matter what happens, next, we can use automations to update scoring, lists, and properties/fields. Then, when it comes time to send the next email or asset, depending on the value of any one of these things (or multiple if you are more advanced), you can send that constituent on a different path.

Example - Save the Chimps:

Let's take a look at an example. We have worked with a fantastic organization called Save the Chimps. Let's say that they sent out a report to a new subscriber about the work they have done over the past year. Within this report, there are links to look at fun events they do, such as Chimpmas (did you know that Chimps will decorate Christmas trees?), to meet individual chimps and learn about their sponsors, and one to look at the origin story of the organization and their expansion plans. Depending on this action taken, you could determine which email would be best to send next.

- If someone looked at Chimpmas, then perhaps send them an email next about Chimpentine's Day and then another about donating for that specific event.
- If someone dug deep into the individual chimps, their stories, and their sponsors, maybe make the next email a highlight of a specific chimp and then follow that up with a CTA to adopt a chimp.
- If someone was more interested in the origin story and expansion plans, maybe send them a video in the next video that dives further into the mission and then move on to asking them to make a general donation.
- Of course, we can get more complex than this, and we don't necessarily have to or want to choose a unique path based on a single interaction. At the same time, it is easy to set this up, and you can A/B test this with keeping everyone on the general nurture series you have set up for everyone to see what works best.

3. Updating, Manipulating, or Calculating Properties/Fields and Lists:

Automation reaches its pinnacle when we use it to update properties, fields, lists, etc. While it may be fun to use a solid if/then branch within an email automation workflow to change someone's trajectory based on the link they clicked on, if they opened the email or not, etc., that is really just scratching the surface.

When we update/populate properties and fields about a person, company, household, etc., we open ourselves up to a whole world of future automation (and reporting) possibilities that can then be used down the line in more automations. This is something we call stacking automations, where our automations either immediately drive more automations or allow us to drive future automations based on the data that we stored.

Automation Examples:

1. Logging Data:

- Any Marketing Automation Platform worth its salt is already logging when someone opens an email, clicks a link, views a CTA, visits a landing page, etc., so you should already have those data points available to drive automations and reporting.

2. Creative and Dynamic Thinking:

- Let's get creative and dynamic in our thinking when it comes to this before we dive into some things that are a bit more complex and exciting.
- We can set up active lists (a form of automation where we set up filters and people who match the filters are added to the list. We can then decide if we keep people on the list forever if they ever match the filters or if we only keep people on the list who currently match the filters) and add or remove people from lists based on if they have opened an email in the last X days or email sends, seen a particular CTA and clicked or not, clicked a link in two out of the last three emails, visited the Donation page in the last 30 days, etc.
- These lists can help you personalize existing campaigns, make decisions on one-off campaigns, and populate reports to get a good idea of how your constituents are currently engaging with your marketing.

3. Custom Fields and Properties:

A great MAP will be automatically logging more than what we listed above, but what really matters is how flexible and powerful your workflow or automation engine is within that platform so that you can populate, update, or manipulate custom fields and properties to further drive list membership, build if/then branches within automation, and report.

Let's stick with the chimps example:

- There is a landing page that has each of the chimps. Someone can click on a specific chimp page and see more information about that chimp.
- We can create a custom property/field that has a multi-checkbox with every chimp's name and call the property *"Chimps Pages Visited."*
- Every time the person visits one of the chimp's pages, we can automatically select that specific chimp (there are a number of ways to accomplish this - put the chimp's name in the URL path and trigger this automation when a URL path with that name is visited, build that page within your MAP and just select that page, use a custom-coded action so that you don't have to build multiple triggers/if-then branches to accomplish this because you use dynamic variables, etc.) from the multi-checkbox list.
- Then, anyone who has visited that chimp's page will go on a list of people who showed interest in that chimp.
- We will go a step further - we will use automation to populate another property called "Number of Individual Chimp Pages Visited," and we will use automation to increase the value of that property by "1" every time that an individual chimp's page is visited.
- If we want to dial this in a little bit more, we can also only increase the number if it is the first time someone visits that specific chimp's page.
- Now, we have a count of chimp pages that someone has visited. We can segment those people into lists, and if we end up with over X number of people who have visited more than 10 chimp pages, we can decide to create a special campaign for them or use that in reporting to decide what content to focus on in future campaigns.
- Next, we can have some scoring properties, and one of them can be about the interest someone has in individual chimps. Every time someone visits the page of an individual chimp, we can increase that score. We can also factor in how often someone visits individual chimp pages overall or what percentage of website visits include a visit to an individual chimp page.

The sky truly is the limit when we stack automations. Every property/field we populate or update can be used in creating lists or if/then branches, which can drive A/B experiments or determine what version of smart/dynamic content someone sees...and then all of this can be reported on.

Internal and External Communications:

1. Notifications:

Internal and external communications are a big part of automation. For example, let's say that a large donor has visited an events page multiple times. You can set up an automation that will notify your head of advancements/development to reach out one-to-one to see if that large donor would perhaps be willing to sponsor. That automation can even be driven by how frequently the donor donates, how long it has been since they donated, and if their donation cadence is on track with their historical cadence.

We hope this has inspired you to take your ideas to a LucidChart or MiroBoard and really start exploring how you can both make your own life easier and more productive and your constituents happier by leveraging the power of automation.

Assessment Area:

Reporting and Analysis

Even if you have the greatest full-funnel strategy in the world that is tracked, personalized, segmented, and automated...if your reporting and dashboards are not great, you will not be able to reap the biggest benefits of making your marketing great to begin with. You won't be able to understand:

- Who is responding to your campaigns
- If your segmentation is working or not
- Who and what you should focus on based on who is responding, who is not responding, and what is working
- If you are on track to reach revenue goals tied to your marketing
- Whether marketing is making an impact on development, membership growth, volunteer engagement, etc.

Essentials for Solid Reporting and Dashboards:

1. Basics:

Everyone needs to start with the basics when it comes to dashboards and reporting. Let's start by talking about the difference between these two entities and why they are both so important.

We all know that reports provide information and can do so in several formats: tables, pie charts, bar charts, line charts, scatter plots, etc. Reports can also have text boxes that provide insights and information. Dashboards feature a collection of reports.

It is absolutely crucial that your reports visualize your data in a way that is easy to digest and that your dashboards provide you with a collection of reports that help you gain better insights than a single report can give you. They should be related and help you make better decisions faster.

2. Defining Questions:

Before you even dig into all the cool reports you can build and collect in dashboards, you need to define the questions you would like to answer. Before you get into dashboard building, determine what questions you want to answer, such as:

- How much website traffic do we drive each month?
- Where does it come from (this can be high level, such as channels or platforms, or down in the weeds looking at specific keywords, backlinks, social posts, etc.)?
- Is email marketing working for us?
- Should you try paid ads, or are our paid ads working for us?
- How much revenue did we bring in during X period?
- How much revenue are we likely to bring in during Y period?
- Is revenue up or down, MoM, YoY, etc.?
- What percentage of revenue comes from memberships? New members? Members who have been with us for 1-3 years, 4-7 years, etc.? Membership level or type?
- Who is bringing revenue into our organization, demographically, firmographically, etc.?
- How much revenue are we at risk of losing, or how much should we expect revenue to grow by?

As you can see, it is relatively easy to come up with a list of questions you want answered. That will help you drive reports to create, and when you start to list out the questions that come from answering one of these questions, you will know what to put into your dashboards.

3. Tracking and Automation:

Of course, a very important step is ensuring that you are tracking as much as possible and using automation to generate meaningful data so that you can actually build all of these reports.

Reports and Dashboards Basics:

1. Website Performance Dashboard:

Website performance is a great gateway dashboard. A website dashboard can help you understand how much traffic you have and where that traffic is coming from. Any good MAP will give you that out-of-the-box without having to build a thing.

A website dashboard should tell you which pages are getting the most traffic and allow you to understand more about that traffic, such as:

- Where does the traffic come from, overall for your website and page-by-page?
- How much time is spent on key pages and the bounce rates of those pages.
- What are the top referring links to that page. This will help you understand if you have strong backlinks you should be paying attention to or if a certain page is most likely to be visited after another page on your website, indicating that your internal linking is working well.

Your website dashboard should allow you to segment individual page performance by types of pages. Blogs should have longer session durations than your standard landing pages, so you should be able to view them separately so that your comparisons are more insightful. Compare blogs to blogs and landing pages to landing pages. Then, you can segment within landing pages. A landing page with a CTA like "Become a Member" or "Donate Today" will have very different user behavior than one about your mission, team, etc.

2. Campaign and Campaign Asset Dashboard:

A campaign and campaign asset dashboard should allow you to see how a channel is performing overall while also allowing you to drill down into a specific campaign. Great MAPs will automatically provide you with campaign dashboards so that you don't have to build/filter them, but if you don't have a great MAP, you will have to build this yourself.

You should be able to see how emails are performing. You will want to know your overall open rate, click-through rate, unsubscribe rate, etc. This provides you with insights about several things: how engaged your constituents are, how well your email program is going, if you choose optimal CTAs, etc.

From here, you should be able to tie together landing page performance as it relates to your email campaign.

- How long do people stay on a particular landing page when they get there via email vs. a Google search?
- How many emails does the average person open before they start to consistently click on your CTAs?
- What types of subject lines result in the highest open rates? Filter for the ones with the highest open rates and see what they have in common.
- Do your CTRs on CTAs align well with open rates? If not, maybe consider shifting the CTA or the subject line so that there is more alignment.
- How are different channels interacting to drive better results? How can you build a dashboard that will allow you to see multi-touch contact and revenue attribution?
- How is a specific ad platform, ad group/audience/segment, ad creative, keyword, etc., performing for you in terms of CTR, CPA, etc.?

3. Constituent Journey and User Profiles:

Once you understand how individual components are performing, you want to start tying those together in dashboards that will allow you to understand the constituent journey and build user profiles. These reports and dashboards should allow you to ask questions like:

- How much time does it take for someone who learns about us through Paid Search ads to become a donor?
- Is someone more likely to sign up for our email list if their first visit to our website is from Paid Social, Paid Search, or YouTube?
- Do you need to continue delivering paid advertising to a constituent once they have signed up for our email list? Can you engage them 100% through owned channels, or does paid still have a role to play, and if so, what is that role?

4. A/B Testing:

You also want to look at A/B tests, and what you learn from these dashboards should drive what A/B tests are run. The list of intersections goes on.

- How much time does it take for someone who learns about us through Paid Search ads to become a donor?
- Is someone more likely to sign up for our email list if their first visit to our website is from Paid Social, Paid Search, or YouTube?
- Do you need to continue delivering paid advertising to a constituent once they have signed up for our email list? Can you engage them 100% through owned channels, or does paid still have a role to play, and if so, what is that role?

Revenue Reports and Dashboards:

1. Revenue Tracking:

Once you get these types of dashboards in place, it is time to level up and report on revenue, what is impacting it, where it has been, where it is likely to go, and what we need to focus on right now. This type of dashboard includes:

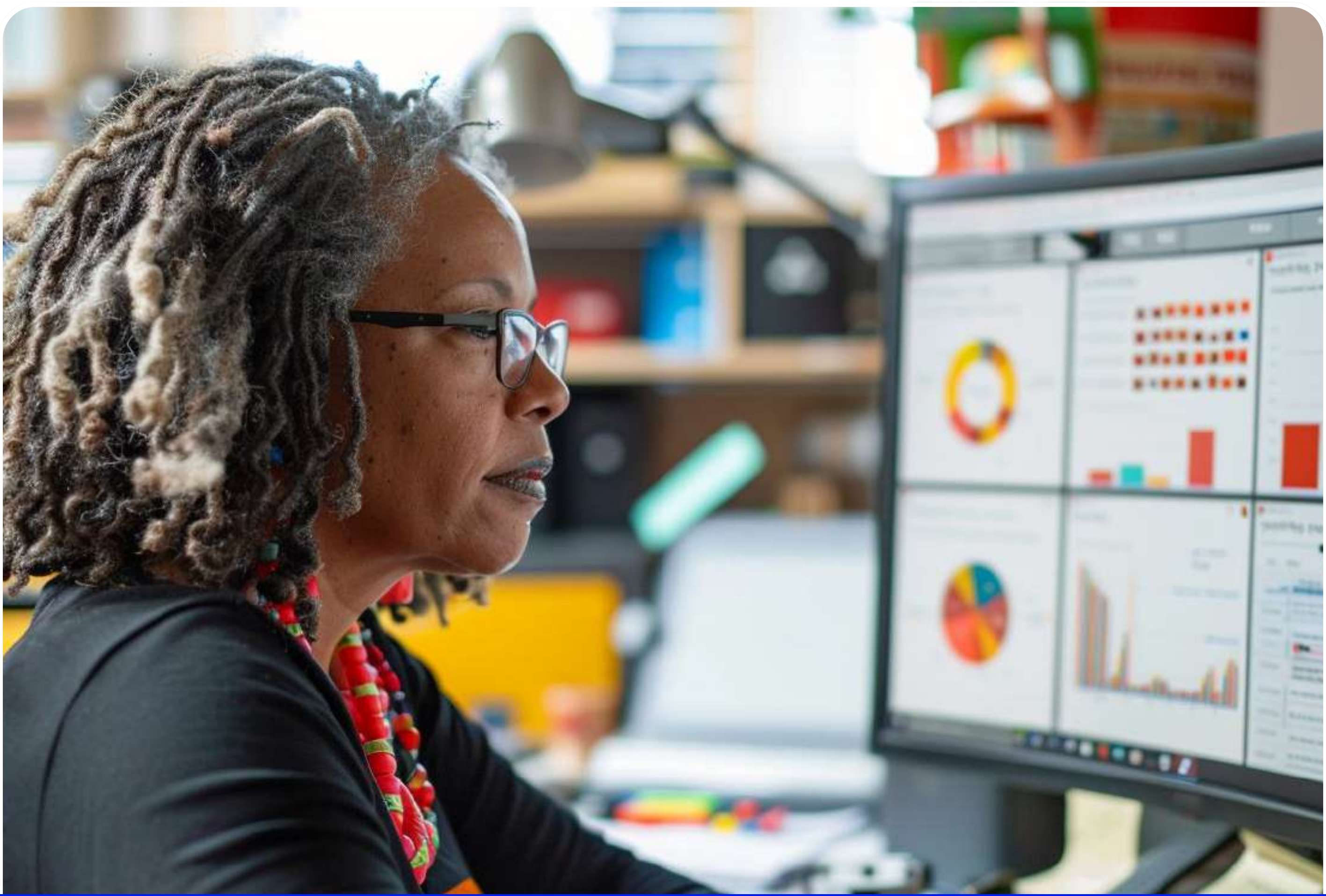
- Pipeline reports: How much revenue is in your pipeline currently? How much revenue do you have in monthly recurring donations?
- LYBUNTS, SYBUNTS, TWYBUNTS, etc.
- New membership revenue overall, demographic breakdowns, types of memberships, channels that drove those memberships, etc.
- Average amount of time that someone is a member before churning and how that number is trending.
- Average time it takes for a new subscriber to bring revenue to your organization.

2. Combining Revenue and Marketing Dashboards:

We could go on and on about all the revenue reports and dashboards you can put together, but the moral of the story is that you can and should be measuring these metrics, organizing them to tell a clear story, reviewing them, and then updating programming, budgets, marketing and communications, etc., to ensure that your organization remains strong.

The ultimate is when you combine your revenue and your marketing dashboards:

- What marketing trends are leading indicators about revenue? Do 50% of recurring donors who stop opening emails stop donating within six months of ceasing to open emails? That is great knowledge to have so that you can both forecast and intervene, either one-to-one or with better, more personalized marketing for that particular audience/person.
- Does a particular campaign at a specific time of year prevent churn or boost donations? What aspects of that campaign work well, and how can you further amplify it by investing more or getting creative? How will you determine if it worked well or not? How much does X need to grow for it to have been worth the investment?



Conclusion

In summary, it is important to approach your marketing strategy holistically because the rewards for your organization and your constituents are immense. You don't have to do 100% of what is in this guide. To be honest, most organizations are barely doing 5% of what is in this guide. If you were to do 25%-40% of what we outlined here, you would experience growth and sustainability that are the things nonprofit dreams are made of. You could break the cycle of uncertainty and have a lot more fun fulfilling your mission.

Regardless of your point A, choose 2-3 action items that were suggested from each of these sections, document everything (things you have already done and want to do), and get to work. Stay disciplined with focusing on all of these categories – you can't skimp on any of them. You are better off doing one thing in each category and ensuring that they are all covered.

If you don't run a full-funnel strategy, your bucket will have too many holes to ever fill up, and your marketing programs will feel like expenses rather than assets to your leadership team. If you don't track and you don't automate, then you can't properly report, and if you don't report, you won't know how to improve and won't be able to prove your impact.

This was a lot to digest, we know. So revisit this guide every couple of months. Pat yourself on the back for the improvements you have made. Remind yourself of what is possible. And then pick a couple of new focus points for each section and go forth and conquer again. Marketing matters. The work you do makes or breaks an organization. Communication is everything, and you, my friend, are a communication artisan and technician at the same time.

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