

**Nonprofit 911 – April 20, 2010**  
**4 Easy Steps to Better Email:**  
**Improve Your Results through Careful Testing**

with Heather Dixon (Emma) and Rick Christ (Amergent)

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**Rebecca Higman:** Now, I am really excited to introduce our presenters. First we have Rick Christ, who actually gave up direct mail fundraising in 1999 and has been working with only nonprofits since then, so he has got 10 years of nonprofit experience, at least, focusing on nonprofits. And he helps them to use the Internet for communications, fundraising, and advocacy. He started NPAdvisors.com and recently merged with Amergent, where he is a Vice President of Online Fundraising.

Also on the phone today we have Heather Dixon, who works at Emma, which is a web-based email marketing and communications company that helps small businesses, nonprofits, and agencies create, send and track website email campaigns. Of course, we know Emma because we partner with them to offer nonprofits our EmailNow powered by Emma email service.

So, as Emma's Agency Relations Manager, she leads a team of folks who are dedicated to helping Emma's agency partners become experts in email marketing strategy.

So, without further ado, another big welcome to everyone on the phone and to Rick and Heather. And Heather, I am going to turn the floor over to you to kind of set the stage and get us started for today's call.

**Heather Dixon:** Sure. Thank you Rebecca, and welcome, everyone, to the call. I look forward to getting some questions from you, and also, to working with Rick to make sure we are bringing you up to speed on how to maximize your results with email marketing.

Some of you might be on the call because you want to know more about how you can get the best results with your current email marketing strategy, or maybe you are actually just thinking of trying out email marketing and are curious as far as how to even get started.

There is a lot to consider when you are engaging in any new outreach program or any way that you are communicating with the folks who support your organization. And I think that anytime you are trying something out for the first time, it can feel a little bit intimidating.

But the great thing about email marketing is there are probably some basic components that you are working on right now that you might not even consider as a way of testing your audience and seeing what works best. But you are already doing them and they are really easy to keep an eye on and to sort of tweak so that you make sure that you are always engaging folks in a way that grabs the results that you are looking for.

So I am just going to go ahead and talk you through a few of those. And as Rebecca said, if questions come up while I am chatting, feel free to send those her way, and I am happy to stop and take those.

So, on the whole that we know, on average, anyone who is logging in and checking their email on a daily basis is getting about 140 messages a day in their inbox. So those are personal messages from friends and family, those might be other marketing efforts from retailers, restaurants, or anything else that they might be interested in getting, and also, of course, just the day to day workflow of information in your inbox.

So rule number one is to think about: How are you going to stand out among all of those 140 messages so that people are going to read what you want to send to them? And the very first piece of that seems a little bit simple, but it is really important — your subject line.

So in your subject line, you want to make sure that you are indicating who you are, so you are mentioning your name or at least your brand, specifically. You want it to be enticing so that it is prompting folks to go ahead and open up the email to read it. And because it is a little bit of a shorter space, you want to make sure that every word you are using can be justified and that you are using powerful language.

You might even consider taking it a step further and using your subject line to tease or reference the most important piece of your email so that there is no question when I get that email in my inbox what you are trying to communicate to me, and I will go straight to open up that email.

We have a report from the Email Sender and Provider Coalition that says that 58% of people polled said the subject line was the most important factor in whether or not they opened an email. So again, something that you are probably already doing, or something that you've considered, but you want to think beyond subject lines like, "Friday's Newsletter" or, "Q1 Quarterly Report" and just be very specific and give people a chance to know what is waiting for them inside the content and prompt them to get there.

So once they've opened up the email and they are seeing your brand and they are looking through your message, the very first piece of just making sure that you are providing really engaging content to them is actually determining what your goal is on the front end. So are you looking to drive folks to your website? Probably all of you are looking to increase donations, so you want to pay attention to that donation button, and where you place it there, and the language that you use there to get folks to click there.

But also, you know, are you just communicating with your volunteer staff on their schedules, or is it something that you are using internally to let folks know about a big event? Just outline your clear goal before you get started. It is a great way to make sure that you are sending the best message to the audience of folks who are receiving it. So really let your goal shape that message.

For those of you who are new and sort of considering email for the first time, the first time that you mail to a group of folks, acknowledge that they haven't heard from you before, this is a new medium that you are considering. Let them know, if you know, how frequently you plan to send,

and that just sort of sets expectations in their mind and really makes it more of a sort of ongoing dialogue between you and them, unless it is just another marketing message that's being sent out to them, you know, that they get every day.

One way besides copy, which, of course, we all just think of words and how daunting it can be to generate all of that and to be communicating just with a paragraph of information is to sort of just think beyond that and think about the images that you can send through that are really going to connect and resonant with people, especially if you are sending out to donors. Let them see the people that their helping, or send them pictures from the last big fundraising event. All of that is actually bringing a human element, which is so important. Because at that time, when they are reading this email, you've got them as a captive audience. They are paying attention only to you. And the more that they can connect with where there volunteer hours, or their time, or their donations are going to and sort of seeing the results of that. That is a really big piece of it.

So speaking about images, of course the photographs, but you can also consider using video in your email, which is really simple to do, and there is a way to do it so that you are not going to affect deliverability. Some of you who have been doing email marketing for a while know that if you were to try to attach a video, there's the chance that that's going to be moved to spam box and it's not going to actually make it to your recipient. But if you host the video elsewhere and just sort of include a link to it, not only will you be able to track the folks who are clicking that link, but you will make sure that they actually get the message.

So video is so simple to do, and it is just a great way. You can interview people or you can record your volunteers if they're doing the river cleanup or whatever the case might be. Again, it's just another way to really add that human element to your inbox.

We worked with a client who initially, in all of the campaigns that they were sending out, had about a 5% click rate. So what that means is anyone who's opening the email and then clicking on a link to get more information, which is how you sort of judge interest and engagement, only about 5% of people who were opening the email were clicking through. And so they introduced video to the email. It was just a short message of their CEO communicating about a large event that they were putting together for fundraising.

And after just a couple of campaigns with that video where people were seeing that more sort of personal message, their click rate rose to over 26%, which is about a 500% increase in engagement. So again, just thinking outside of the relevant and the personal engagement coming from just the words you use, consider the images and the videos that you can provide as well that really give your audience that personal experience.

So listening to Rebecca talk about [xx 9:07] and the number of people that they help, I was just thinking, like, with all of you on the call, how busy everyone is and how, especially in some of the smaller nonprofits who might be represented, how you all wear probably five or six different hats. So I can only imagine that those of you who are responsible for the email marketing are also responsible for about seven or eight hundred additional tasks that you are in charge of.

The cool thing about email, there is a feature called a “trigger” feature or an auto-responder; it just sort of depends on what system you are using. But most email marketing service providers have a way that you can take a little time on the front end to set up some communications, and set it up so that they go out to your audience maybe a week later or two weeks later.

So you’re spending all your time just initially to sort of create the message and craft it. And you’re just doing that once and you’re pushing send and the system is actually working for you so that every three days or five days or whatever the case may be, you’re in the inbox and you’re presenting your message to your audience, and they’re sort of continuously getting information from you, but it actually doesn’t actually take any more time from you to get that set up.

So, just as far as always being present in their minds and sending them information, it’s a great way to sort of take advantage of some of the features that an email marketing tool will be able to provide for you.

**Rebecca:** Heather?

**Heather:** Yes.

**Rebecca:** This is Rebecca. I just wanted to jump in. Courtney actually sent in a very timely question since you’re talking about trigger email, so do you mind if I throw you one real quick?

**Heather:** Absolutely.

**Rebecca:** Excellent. So Courtney wrote in and said that her organization is considering transitioning to a trigger based emails. And she wanted to know what your thoughts were about the best way to gauge if that’s a good decision or to test the effectiveness after making that shift.

She lays out that they’re considering doing it for those that sign up to start an application, frontloading communications for the first 30 days and then transitioning them to the general newsletter – you know, deadline reminder kind of emails segment.

**Heather:** Yeah, and Rick, of course, can jump in, too, but we actually believe that trigger emails, particularly a welcome email for as soon as someone signs up, is a great way to go, because what you’re doing is sending them that content that they’ve asked for, that they’ve requested right away. So they see that from day one that you’re sort of listening to their needs and sending them what they’re interested in hearing.

We know that most folks who are sort of getting email messages for the first time are the most active within 60 days of signing up for an email, so that’s a great window to make sure that you’re sending them those triggered messages.

Again, it’s not taking you any more time along that way. It’s just sort of a little bit more of a set up. And so what you’re doing is you’re just making sure that you’re always in front of them in those first 60 days, which is when they’re going to be the most likely to read your email, act on

your call to action, click on that “Donate Now” button and sign up to attend an event – whatever your goal would be.

It’s definitely something we consider worthwhile and we have an example from another client of ours using trigger emails who was actually able to increase his open rates by about 15%. He is a speaker who goes around and talks to high school students about colleges and just sort of about the whole process of applying for school and what to do when you get there and just acts as a great educator for parents and high school students alike.

He was actually able to save about \$10,000 on direct mail costs because he switched to email marketing and then used that trigger series to stay constantly engaged. And parents and high schools and counselors were using his email messages to request that he actually come speak. So he was able to cut out 10 grand in his marketing budget just by using the trigger feature.

**Rebecca:** Excellent. And then, you know what, we’ll probably come back... Later, Rick is going to be focusing on the testing element of improving your email program. So Rick, maybe we’ll come back to that in a little bit and see if you have some pointers to throw in about testing the effectiveness and doing stuff like this. You know, Heather just mentioned the open rates and we’d love to hear your thoughts, too. So let’s table that and come back to it in a few minutes. But Heather, if you want to keep going with your general tips, that’d be great.

**Heather:** Sure. And you know, for leading off of that and everyone wearing multiple hats and really just sort of using all of the tools that are available to you. I think Rick will probably have a lot of great details about best practices and sort of firm numbers and that sort of thing. But I think above all else, the most important message is to just pay attention to your audience.

So as you’re in your system and you seeing the time of day that most folks seem to be opening their email – you know tailor for their messages to them. If you find that a longer subject line versus a shorter subject line is actually increasing your open rate, by all means, go ahead and employ that method as opposed to something else that you might have read on an email status website.

You are going to know your audience better than anyone, and just by paying attention to the things that they’re engaged in and the response that you’re getting and those details that are available to you, that is really where you’re going to find the benefit of testing and paying attention and being able to make sure that, from here on out, you’re hitting the needs and you’re giving them the information that they want to hear from you. And then that’s going to drive your goals, again, of getting them to your website, or getting them to donate, or to volunteer their time, or find sponsors or partnerships. That’s something that you’re going to be able to determine on your own.

**Rebecca:** Excellent. Thank you, Heather, for setting the stage and giving us more than half a dozen great tips of how to really make your email stand out in the inbox. So now that we’ve got this, you know, whether we’re just starting to dabble or we’re feeling pretty good about where our email campaigns are now, now we can move forward and talk a little bit about how do we

improve? Now that we have kind of got these best practices under our belts, what can we do to continually make our emails better?

So from here, I'm happy to turn it over to Rick to start talking about testing your emails and letting us know a little bit more about what that means and how we can continually get better as our emails progress.

**Rick:** OK. I'm going to use as an example one of the clients we work with, which is actually a Senior Citizen Social Security and Medicare advocacy program. I love talking about this client for a number of reasons. It's the first client I've ever been involved with, so I've worked with him for 11 years. They've given the leeway to do an awful lot of testing, so we have an awful lot of data.

But I love the fact that this is an organization that, by definition, appeals only to people 65 and older. And in fact, this particular organization works on issues that really matter to people who are in their 80's.

We've got 40,000 of them subscribing via email and coming to the website, so it really blows away the myth that email is primarily for young people. It's also very true, I'm sure, that some of the things that work for this audience would work differently for an audience of younger people. I'm convinced that, for example, the emails that we send to these people wouldn't work well with a group of people who only spoke Portuguese because it's in English.

For the same reason, it wouldn't work well for teenagers, because if you think teenagers in America speak the same language as senior citizens in America, I would bet that Portuguese teenagers speak more like American teenagers than they do like American grandparents.

Anyway, we do a lot of testing. So here's one thing we did that does some testing, or the results from some testing. We used to mail a huge newsletter once a month. It had 10 or more articles in it, all related to different things, related to Social Security, Medicare issues, ways to save money on your Medicare, doctor bills — things like that. We used to put big chunks of the articles in it, and we found that people weren't clicking through to the websites because we answered all their questions right in the email.

That was fine for the people, but it didn't generate any action on the website. So we cut it down to just a lead paragraph and then just a lead sentence, and then we found that by simply listing the 10 articles and their headlines along with a couple of other useful links, that that itself was an email that triggered more clicks to the website, more articles being read, and more action being taken in terms of donations and petition signatures than when we sent the bigger email.

Then we got the idea, "Well if that works, let's add a few more things. Let's add links to all the press releases that have been done in the last month since the last time it went out. Let's put in a couple of links to petitions, of course donation links, a couple of other things like that, some great content from three or four months ago that's still being read a lot or that's now more timely.

So we were up to like 20 links in the email. And somebody got the idea, “You know, that’s an awful lot for people to read. What if we broke it in half and sent half now and half in two weeks?”

We did a lot of testing with the group, and I’ll explain how we did it in just a minute. What we found was that we get virtually the same number of people opening, reading, clicking through the website twice a month as we used to get once a month.

In other words, it wasn’t that people said, “Oh well. I’ve already been there, read that.” It wasn’t the fact that some articles were more interesting than others. It was the fact that we delivered news to their mailbox. People opened it, read it and found something, usually several something’s worth clicking through to. And so testing, over a period of several months, told us that we’ve got much more web traffic, many more petition signatures, and more donations as a result of splitting this one big email into two emails.

We’ve done a lot of other testing for this organization, and I’ll explain some of it. Let me get into the nuts and bolts of, “How did we do this test?”

**Rebecca:** Hey Rick, sorry. Let me just interrupt for one second. We just got a little feedback on your volume being a little low. So if you wouldn’t mind speaking up or maybe getting a little closer to your receiver, that would be great.

**Rick:** OK. Is this any better?

**Rebecca:** Sure. Yeah. Just continue on as loud as you can. I think it depends on different folks’ phones and how high their own volume will go. So as loudly as you can comfortably speak, that’d be great.

**Rick:** This is the first time, since I was about two, that anyone ever asked me to speak more loudly than I am, so I will gladly do that.

**Rebecca:** Excellent. Thank you.

**Rick:** With a file of 40,000 emails, it’s pretty easy to create two segments of about four or 5,000 email addresses each. So when we want to test something for this group, and we do it every time we mail, for example, a subject line, we will take these two test segments and we will send the first message with the first subject line, a second message with the second subject line. We will send them on the same day as close to the same moment as we can, because the time of day does impact the results.

Then we will wait about 24 hours and we will look at the results, and then we will mail to the rest of the list, about 30,000, the message that worked the best, whether it was the best subject line or it was the best content inside; it depends on what we’re varying.

When we did these two emails a month versus one a month, what we did was split the file in half. Half of the file got two emails... You know, half of the emails the A version and then two

weeks later the B version. The other half got what they were also getting. And we measured the click-through's, the open rates, and the page views from both together.

Some of you don't have a list that's big enough to do that with. And if your list is 5,000 or 10,000 names or less, then you really can't take two 10% segments. You know, you really can't mail 500 or 1,000 email messages and expect to get reliable results that you could extrapolate to the whole list.

So simply split your list in half and mail one half one of the things you want to test and the other half the other thing you want to test. Again, mail them on the same day and mail them as close to the same time as you can.

So, now, how do you create a test segment? In some email tools, but really only in the most sophisticated email tools, are you able to say, "I want to create a random segment of names that contains 10% or 25% of my file or half my file." We call that A/B split testing in market research and in market testing.

Most of them require you to select parameters based on things you know in the file. Now, if you had everybody's zip code, you could select, in one file, everybody who had a two in their zip code and probably get a fairly random selection, because that two could be the first digit or the last digit. I guess you'd get everybody in Virginia, and so it may not be completely random, but it's close.

But no one has zip codes for most of the people. Many of you only have email addresses. But here's what I found. I can select, in most email tools, people who have a certain character in their email address. The problem is, if you say everybody with an A in their email address, you are going to get all the AOL people in one segment and none of the AOL people in another segment. And AOL might behave differently to your messages. And, in fact, my research has shown they typically do.

So you don't want to do that. So you can't use people who have an A, an O, an L, a C, an O, an M, or even E, D, or U, especially if you have a lot of professors or college students in your file. I find that R, S, T, and C work fairly well. A lot of people have an R, so it's big enough to build a file.

You are going to have to do some playing around to come up with building a cell that creates a fairly reliable test. And every once in a while, send both the tests and the control segment in the rest of the file the exact same messages at the same time, and see if there is a difference in results.

So that's something that's going to be able to actually demonstrate what the results are going to be in your message.

Let me give you a couple other ideas of things that we test in particular and then open up to some specific questions. Heather mentioned putting video in the subject line. And video is a great thing to put into an email message. If you are going to put a video link into an email message,

and it's as simple as putting an image in there and then linking it back to your YouTube page — there's nothing fancy about that — say “video” in the subject line. Say “video:” and then describe the video. You know, “The latest treatment for psoriasis,” or, “watch our volunteers cleaning up the river,” or whatever you want to say — anything like that.

But putting the word “video” in the subject line, you will increase the number of people, the percentage of people, who will open the email. Not only that, you will increase the number of people who actually click on the video inside the message.

What I have studied for a long period of time is things that are done different from each other. So I will test, in the subject line, things that will generate a higher open rate. But what I'll find is that, once they are opened, they should have the same click-through rate. Once people get into an email, whether they get into it from subject line or the other, they should basically read the email and act on it the same way.

And that's not true. If you save “video” in the subject line, not only will more open it, but then more of those people will have clicked through to the video than the people who opened it not knowing there's a video and not seeing the video.

That's particularly true if you are taking a survey. If you ask people in the subject line, say that you're looking for their opinion, you will get the people who really want to offer their opinion, and more of them will click through and fill out the survey. So it's important to structure the subject line in a way that sort of helps people select based on the people who are going to take the action you ultimately want them to take.

Another tip about testing subject lines is I've found, at least lately, that newspaper headline style subject lines tend to work better than complete sentences or verbs that call to action. So instead of saying, “Help us to fight Congress to get an increase in your social security,” a subject line that says, “No increase in social security protected for 2011” will generally get more people to open it. And you will want to do some testing there as well.

Another big key is to mix up the messages. Don't think that these things are going to work all the time. Don't send the video out every month with a subject line that says “video” and expect that the returns are going to continue month, after month, after month. People have very short attention spans sometimes online, and they are always looking for something new.

Some of the things that you need to test are layouts of the emails that you are sending them. Most nonprofit organizations send terribly unreadable email newsletters. They look very pretty because they were designed by somebody who has a flare for design, but who has no clue about how to get people to actually read email messages.

And so they are cluttered up with HTML and graphics, they are two or three columns. People open it and have no idea what they are supposed to do next. Keeping it very simple, preferably one column of links that people are supposed to check, big buttons where you want them to click, not lots of background color. Test the different layouts and see that you will be able to

increase the percentage of people who click through to your website to take the action that you need them to.

And one of the last things that I want to toss out is that some of the most valuable testing that you can do in an email has nothing to do with the email itself and everything to do with the results of the email. I'm talking about the landing page.

If you get people to open an email message because you've given them a great subject line, and then you've written compelling copy and have some visuals in there to make them click through, but they don't ever sign the petition, make the gift, buy the book, whatever, it's probably not the email's fault. It's probably the fault of the landing page itself.

So how do you test that? You do the same thing we talked about earlier. You have your control segment and your test segment. You send them the same email at the same time, except you put a different link in the test email that drives people to a different landing page where you can test something that will help them to include...

Most people do very little testing on their donation form, which is a very volatile point of contact, or on their petition page, or whatever their action page is. Most of them just set up that form and leave it. And, in fact, that's a terrible thing to do, because most people don't get nearly the kind of completion rate on those forms that they should. So do some testing with those forms and the drive people to those different test pages by using email messaging to do that.

Those are some of the key things I wanted to toss out. I'd much more be interested in listening to people's questions at this point, either from me or any other comments from Heather.

**Rebecca:** Excellent. Thanks, Rick. I just want to remind everybody to send in your questions to [fundraising123@networkforgood.org](mailto:fundraising123@networkforgood.org) and I'll be sure to share them aloud with our speakers.

First I'd like to take Patricia's question. Patricia wanted to know if our speakers could address spam filters. She says, "Working for an education organization, I am more frequently and unsuccessfully coming up against school district spam filters. So do you have any suggestions on how to get through?"

**Rick:** If you've got a fixed audience like specific schools, then talking to them and making sure that their IT person will basically white list email coming from your email address that your email messages come from or even from your domain is really a legitimate possibility.

I find that sometimes organizations or people write to me and it will get caught in my spam filter. But I have the ability to go in and say, "No I'll take any mail that this person sends me, even if it talks about Viagra." So that's an option.

If you're talking about many, many different institutions, that's not really practical. What you've got to do is a lot of testing. You might even ask some people to set up an email account. Like I have an AOL account, a Yahoo! account, a Hotmail account, a Gmail account, and I send

messages to those accounts and see where they end up. It might be difficult to do that with institutional-type addresses like school districts.

Heather, do you have any hints for her?

**Heather:** I think both of those are great points, Rick. Also, just to point out that if you are using any sort of an email service provider, their delivery departments would be great resources to ask those folks what seems to be going on. They have relationships with all of the major ISPs, and they'll be able to just give you more feedback on things that you can change and ways that you can ensure that your emails are reaching as many inboxes as possible.

**Rebecca:** Excellent. OK, let's see. We have a question, and either or both of you feel free to jump in on this. I know, Heather, during your portion of the talk today you mentioned determining what your goals are for a particular email when you send it out. Do you guys think that all emails need a particular call to action? We have a lot of folks listening who might just send out an e-newsletter just to share information about what they've been doing and things like that. What are your thoughts on in terms of a call to action and determining a goal for every email that's going out?

**Heather:** I can speak to that quickly. I don't think that, and this, of course, is up to you, but I wouldn't go so far as to say that every email needs a specific call to action. But you also want to make sure that you're spending time on the information that you're sending out. You don't want to get into the habit of just sending to send with information that's not relevant, because then folks are not going to be as excited to hear from you. And when you do send something that requires a little bit more effort on their end, you're not going to probably see as good of results because they haven't been trained to really see the important information that you're going their way.

So I think that as long as your information is relevant to what they're looking to receive from you, you don't necessarily have to ensure that you're asking them to take action on anything in the piece entirely.

**Rebecca:** Rick, did you have anything that you wanted to add before we move on?

**Rick:** I would respectfully disagree. I would say that while it's not necessary, I would say that every organization out there is dying for their membership, especially their most loyal supporters, to do something.

What I would say, though, is that it certainly shouldn't be the same thing all the time. If every email is an ardent appeal for funds, people will just stop opening emails because they don't have to open it. They know what you want. If, instead, email messages are mixed up —Sign a petition. Give money. Read a book —Do things that are offline. “One of our board members is going to be interviewed on a local television station. You should tune in and watch that. You should come to an event. You should ask a friend to get on the mailing list.”

There are so many different things you can ask people to do that I think that you probably have more requests than you do mailing opportunities over the course of a year each that you probably ought to schedule them and invite people to do that. I would say that you probably don't want multiple calls of action. I mean I've never sent an email out that didn't have a donate link in it, but putting a donate link in it isn't what I call a call to action. Saying, "We need to raise \$10,000 by Friday and we need \$50 from you," that's a call to action.

So you should always sprinkle around links to what's new, events calendars —things like that. But I would say that you can generate lots of action by putting a call to action, and why wouldn't you do that?

**Rebecca:** OK. Let's see. We have a question here from Shana regarding something that you said earlier, Rick, about the headline-type subject line. Shana just wanted to know if you could give additional examples that "newspaper headline-type" subject line. It sounds like she's become pretty accustomed to using call to action right in the subject line.

**Rick:** When Michael Vick was arrested and charged with sponsoring dog fighting and his football career was temporarily brought to a halt, the Humane Society launched a great series of campaigns via email about that whole issue. Some of their email subject lines talked about the specific events of the day: "Michael Vick Indicted for Dog Fighting" — things like that. It didn't say "Sign a Petition" or things like that.

Now, they certainly used lots of those kinds of action-oriented subject lines. But you should test a subject line that if a newspaper took what you wrote as a press release and put it into their newspaper, what headline would they use? And then maybe juice it up a little bit like the New York Post might, as opposed to the Wall Street Journal, and then try it that way.

**Rebecca:** That makes a lot of sense, and some of the research that we've read and that we've seen is that sometimes folks will be turned away from a particular email if they see the call to action in the subject line, because maybe it's not exactly the right moment for them to be getting that message.

So if they see "Donate Now" or "Help Now" or "Sign a Petition Now," maybe they're checking their email at work and they say, "Well, I'll just do it later" and then they forget or file it away and never look at it again. But if it's something more informational, as Rick is laying out, it might seem a little bit easier for them to be passive and they don't feel like there's action required but certainly offered once they actually open the message and see what you're talking about.

**Rick:** If you want great subject lines, talk to the copywriters who write direct-mail copy and ask them what they put on the front of the envelope. Because the teaser copy that's on the front of an envelope is really a subject line, and its goal, of course, is to get that envelope opened. And so you'll rarely find specific calls to action. What you'll find are teasers: "We need your opinion on healthcare reform" or "Seven easy ways to increase your email response" or something like that. And that makes people open it to get what's in there.

**Rebecca:** Good point. We have a couple questions from Jamie. I think we'll take them one at a time. The first question is for Heather, and Jamie don't worry, this is a perfectly reasonable question. She says, "At the risk of sounding really dumb, can you explain what a trigger email is?"

**Heather:** Sure, absolutely! I think the terminology for it probably varies depending on the email system that you're using, but a trigger email or an auto-responder, or even I think some folks call it a drip email, is just a series of emails that are sent to the same person based on an action. So the first time someone signs up to receive your email, then what you would do is you could set up a triggered welcome email to go to them immediately.

If you're working with folks and you're collecting a date that's important to them, their birthday, or anniversary day, or maybe the day that they joined your membership, you could set up a triggered email to send a campaign to them automatically every year. So it's anything that goes out automatically based on an action, and it doesn't require that you actually go into your account and send it at that time. It's something that you can set up initially and then sort of just let your email marketing do the work for you.

**Rick:** So its triggered by something that's in the data record for that person.

**Rebecca:** Absolutely. So, you know, Heather was pointing out that it might vary depending on what email service provider you have. So just to provide them context, for instance, with Network for Good's EmailNow powered by Emma service, there are four main instances where you can create one of these "trigger" events.

So as Heather laid out, it could be when they sign up to receive your message, if there's something date related, perhaps even if they click a link in one of the email campaigns you send out, or even completes a survey, because, for instance, in EmailNow there is a great survey functionality. So if someone completes a survey, rather than you having to go and follow up directly, you set up a trigger once, and when someone finishes it, that email goes directly to that person right away.

So, I'm happy to provide some add-on to that.

**Rick:** I'd like to add on to that. It really is an example of the best kind of email. Most of the time, most of us are sending emails to people when we think there's something that we need to say, rather than when we think there's something that they really would want to hear.

And so the best emails are segmented based on what you know about people. That is to say, those who've given versus those who haven't; those who've signed a petition versus those who haven't. Then they are customized with language that pertains to that characteristic. And finally, they are personalized "Dear Friend" instead of "Dear Supporter" if you've got that information, or "What we've done with your gift of \$25" is better than "What we've done with your gift."

So a trigger email is simply an automated way to deliver to people a set of messages based on what you now know about them based on action you've just taken.

**Heather:** This is just to add what to Rick just said. Because it's going out immediately, you are catching them in the moment when they've acted on something and you know that you have their interest and they are more receptive to receiving that information, just because they've just acted on your behalf at some point or other.

**Rebecca:** Absolutely. Let's see. Jamie had a couple of other questions, and one of them was, "Rick, you talked about testing landing pages as well. So actually, where a subscriber lands once he or she clicks on a link in your emails to begin with. So what do you consider a good landing page? For instance, you mentioned testing a donation page. So what kind of elements on that page where they land, what elements do you recommend testing, and maybe what have you found works well to get folks to maybe complete one of those forms once they've clicked through? You've gotten them through so far. Now what can we do on that landing page?"

**Rick:** Well, first the bad news. According to Convio and some other people who compile tons of data, less than 20% of the visits to a donation page result in a completed gift. Less than 20%. And so part of it is because people click on vague buttons like, "How you can help us" and boom, they end up at a donation page and they didn't mean to, so they click back.

But a large percentage of the people who don't are because they can't figure their way through the damn form. So almost any change is likely to have a significant improvement. Here's something I heard at a conference a few weeks ago.

I think it was Ducks Unlimited has an "ask" string in their email. What that means is they've got three different amounts, let's say, that they invite people to give. \$25, \$50, or \$100, let's say. And they have them arranged in one line from left to right with little radio buttons — \$25, \$50, or \$100.

They changed it to be a vertical list — \$25, then \$50 underneath that, \$100 underneath that — and found they had a 25% increase in the number of people who completed the gift. I'm not even talking about that they clicked a different box and made a bigger gift.

Little things like that can have a huge impact. So here is one tip. Make sure that the form starts above the scroll. There is nothing more puzzling for somebody when they get to a form that they expect to be a donation form, a subscription form, a petition form and it doesn't look like that at all because there are no blanks on the form to fill out, because you've cluttered the top of it with yet more copy encouraging them to give, or sign, or subscribe.

Start the form. Even if you have to take part of the right-hand side of the page for the form, start to form so they will go, "Ah, here's where I start if I don't want to read anything else." And that's one test that you can do.

But the arrangement of the data on a donation page, for example. When I'm giving, I think people should ask me first: "How much do you want to give? Where do I want to direct that money to? Then who am I?" And finally, "How am I going to pay for it?"

A donation form that starts off with “Who am I and how am I going to pay?” is a little like being seated at a restaurant and instead of them saying, “Well, how many are in your party?” they say, “How are you going to pay?” Wouldn’t that take you back a little bit? You say, “Well, how about if I get a table by the window for four people, and what are your specials?”

And I think that you need to do that kind of testing. So those are some things to throw in. But a general rule is start the form right up top so that people see it as soon as they click there and can get started on it. Once they get started on it, they tend to finish it.

**Rebecca:** Great. All right. Let’s see. So we’ll move back one step and talk about testing email groups. Veronica wanted to know our speakers’ suggestions for making good control and testing groups. “Depending on how much data you have available, should people be divided based on their past giving levels, their geographic locations, demographics, etc? What do you guys recommend?”

**Rick:** Well, first, depending on what their history is with respect to the action you are looking for. If the email says, “We need you to sign a petition,” the people who’ve already signed the petition, you are not going to ask them to do that. You want to ask them to do something else, like, “Get three friends to sign the petition,” or, “Give us more money so we can put more banner ads out there to get more people to sign the petition,” or something that lets them build on what they’ve already done.

Then, people who’ve signed other petitions but not this one, they are a ripe audience. But you need to explain to them that this is new, this is important, and they need to do it. And then you get the “great unwashed,” the people who’ve never done anything for you with respect to petitions. You’ve got to write something different to do that.

But you do that... You’d split them up differently. If it was about donations, you split them up differently. If it was about a special event... If you are a regional based organization, geography plays an important role, based on distance, or preferably based on zip code. I mean, you know, [xx 48:25] City isn’t that far from Hoboken, but nobody crosses both bridges to go to see anything.

So if you are a university, people who live within the distance where people would come to a concert or a sporting event versus the people who aren’t, they are going to get different emails and they are going to respond differently to them. Heather?

**Heather:** Yeah, all I can do is agree with you Rick. I think any poignant information that you’ve got on the folks that you’re sending to is a great place to see where people can be grouped based on like information or like interests. And, of course, the first piece of it is just their history of actions with your particular organization.

**Rebecca:** OK. So once these emails are out the door, Veronica wanted to know if you guys had any sense... You know, I know we were talking earlier about how no benchmark fits all. Everybody has their own response results that they should be testing against themselves.

But do you have any indicators or general rules of thumb in terms of what are good benchmarks for open and click-through rates for nonprofit emails?

**Rick:** Well, I would direct it to Convio, M&R.... There are a number of organizations that have done lots of original research, based on millions more emails than I've analyzed, who have statistical averages. So I always like the 20/30/40 rule. I love to see 20% of my subscribers opening email, 30% of them clicking through — that is 30% of the 20% — 40% of the 30% of the 20% taking the action that I asked them to take.

But I think what is more key than that, though, is finding what the weakest link is. In other words, if 20% of your people are opening email, and a bigger percentage of those are clicking through, and an even bigger percentage of those are taking the action, then the weak link is the open rate. If you could get more people to open, well, you've got lots more people coming through.

In most cases, the donation form is so terrible on a fundraising email that the problem isn't getting people to open email or getting them to click through to the donation page. It's getting them through the donation page. And so you've got to do some landing page testing.

So find out what that weak link is; the one thing you say, "Boy, if I could only fix this my results would be great." That's the one you gotta start with. And shoot to double it. Don't just shoot for marginal increases of 10% or 20%.

When I send a message with two subject lines and one does 10% or 20% better than the other, I yawn. I mean so many things could have impacted a 10% or 20% difference that it really isn't anything to hang my out on. If one does twice as well as the other, 50% better, now I'm getting excited about.

So don't get hung up on... I know when direct mail people go, "Oh, this one did 5.7% better than the other".... In a mature business like direct mail, when you are sending out billions of pieces of direct mail... I used to play that game.

Email, where too few of us know anything and the audience changes as rapidly as it does, don't sweat minor differences in open rates and click-through's. Shoot for big changes.

**Rebecca:** Great. Let's see. Our next question is from Patrick, and it is a good follow-up, because he actually has reports about what his numbers are and wants to know about a next step. Patrick says, "We have an average open rate of around 22%, which is good, and a click-through of around 3%. So clearly there is room for growth there. But both numbers could be improved if I called out the people who don't open anything. So my question is, what is the prevailing wisdom on dropping non-openers from my list?"

**Heather:** I can go ahead and answer that. I'm afraid Rick is going to disagree with me again, but that is a good thing because I think that is something that is sort of a hot topic in the industry right now, as far as acknowledging those folks who aren't opening.

And one thing that we always advise against on a sort of one particular campaign basis is don't resend to folks who haven't opened, because that is just going to annoy them. That's just sort of the small picture. But then looking at the larger picture, there are methods of reengagement that you can work on. If you notice that folks haven't opened in six months, nine months, or a year, reach out to them, call them on it, and give them the opportunity to tell you why they are not reading or what they are not getting from you, and then just sort of start to change your message so that you are bringing them back into the fold.

If you have a small enough list, you might even consider doing that not by email, but actually reaching out to them in another way and just recognizing that they are not as engaged with you with your email tactics as you would like them to be.

I'm interested to hear what Rick has to say in response to that. [laughs]

**Rick:** Well, I hope I don't disappoint you! I used to believe: "So what? Send an email. Send emails with more provocative subject lines. You know, wake these people up, damnit!" And then I started getting smacked around by the big ISP's — what I call the "spam vigilantes." Vigilantes because they don't have the power of the law, they just act like it anyway.

AOL shoots first and asks questions later, and so do the rest of them. That is to say, they love looking for opportunities to not deliver your mail, and they use, as a threshold, an infinitely small...

Is anyone from AOL on this call? Anyway, that's OK. They're muted.

If one subscriber out of 1,000 AOL subscribers clicks the "This is spam" button, they get mad and they hammer you, and hammer the people at Emma — your deliverability people that you were talking about earlier.

I have always counted them my biggest enemy. You know, "These people want me to triple opt-in everybody!" But it's true! Dealing with spam complaints is a huge problem! And I've got lists that I can't mail anybody on who has an AOL account because that AOL threshold is so small.

And so my guess is that it's not coming from the 20% who are opening it, but it is coming from the 80%...I mean obviously they are opening it — they are clicking "This is spam." But it is coming from that majority of people who have never opened an email from you ever.

And so I would say, yeah, maybe it makes sense to send an email that says, "If you don't respond, we are going to unsubscribe you" right on the subject line. And then do it; take them off and don't send them email messages. Because you probably pay a higher price in spam nonsense than you would get in results from those people if you ever got them out of their little comas.

**Rebecca:** For now, I am going to wrap us up here for the day and thank everybody for joining us. We know how busy your schedules are; we've made a lot of allusions to how many hats you wear. We really appreciate you taking the time to join us.

And, of course, thank you to our presenters Heather and Rick. We really appreciate you being on the phone with us today.

**Rick:** My pleasure.

**Heather:** Thank you, Rebecca.

**Rebecca:** Excellent. So thanks again everybody. As I mentioned, we are going to be opening up our big spring schedule for Nonprofit 911 within the next few days, so please be sure to check back to [www.nonprofit911.org](http://www.nonprofit911.org). And that will also be the site where the audio and written transcript from today's discussion will be posted as soon as they are available.

So thanks again everybody for joining us on today's Nonprofit 911, and we will speak with you again soon! Have a great rest of your day.