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Your Best Email Campaign Ever: 4 Steps to a Winning Strategy This Fall

with Kivi Leroux Miller
Sponsored by Network for Good

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www.fundraising123.org or www.nonprofit911.org

Rebecca Higman: I am happy to introduce today's speaker. As a staff member, volunteer, board member, and consultant, Kivi has helped dozens of nonprofits, large and small, community based and nationwide, to get the word out about their work, recruit new members, donors, and volunteers, and develop creative strategies that worked all on limited financial and staffing resources. Kivi is fond of saying she wouldn't know what to do with a million dollar budget. She is used to working with small and growing nonprofits with small budgets.

Kivi is president of EcoScribe Communications and Nonprofit Marketing Guide.com where she hosts weekly webinar series on a variety of communications topics. And this summer she is also writing a book due for release next year in 2010 called "The Nonprofit Marketing Guide."

Just so you know, prior to founding EcoScribe Communications, in 1998 she worked for 10 years in the environmental and community economic development fields in the San Francisco Bay area. So after many years in San Francisco and Washington D.C., she now lives in rural North Carolina with her husband, her two young daughters, two cats, a dog, and countless backyard wildlife.

So without further ado, I am happy to turn the floor over to Kivi to get us started.

Kivi Leroux Miller: Thank you Rebecca. I am going to have to update my bio because we now have three cats. All of you on Twitter heard all about our adoption of a wounded cat a few weeks ago, so I will have to update that.

Thank you so much for having me back. I love doing these calls. The folks that are interested in Nonprofit Marketing Guide are also usually the nonprofits that are interested in what Network for Good is doing. We both focus on helping smaller organizations that don't necessarily have fulltime communication staffs but still do a really great job engaging their audiences, their supporters, in supporting their good work. So I love working with Network for Good, and thank you for having me back.

What I want to do today is really talk about four different steps that you should go through as you are thinking through a fall campaign that would lead up to a big appeal in December.

As I am sure all of you realize, December is the biggest month for giving period, and the biggest month for online giving. And Network for Good certainly has the tools to help you make the most of that.

So what we are going to focus on today is saying, “OK. Let’s take as a given here that we want to do an appeal in December and really try to make it powerful, really try to raise some significant money, increase how much we have raised over past years’ appeals; that is our goal.”

So how do we make that happen? Well you have got to put some steps in place to get your supporters, the people on your email list, to the point that when they get that email in December, they are ready. They are going to go ahead and click. They are going to do what you ask them to do. They are going to go for it without question.

So that is what we are really going to talk about today, the steps that you need to think about this fall to implement this fall so that when you get to that appeal in December you are ready to go.

I am actually going through this process myself right now for an organization I volunteer with here. As Rebecca said, I live in a rural community in North Carolina now, so this whole process is very much on my mind as I go through and try to help this very small community based organization do exactly what we are talking about today. So I am going to refer back to them a little bit as we go through these steps and try to point out how they might be a little bit different from some of the more general strategic advise that you see out there and that I have put out there.

This is very much the quick and dirty way to go about it. It is not necessarily the way to go about it if you have got tons of time and tons of staff to really think it through and implement it. This is the quick and dirty, boots on the ground approach to email marketing this fall.

So step one is really thinking about the list; it always starts with the list, which is the equivalent of thinking about your audience first, which you always hear is your number one thing to do when you are putting together your marketing plan strategies. So with email marketing it is all about the list.

And if you are an especially small organization that is just really starting with email marketing like this organization that I am working with, then you probably don’t have a lot of email addresses, and you really need to go in there and take a good look at your list and figure out what percentage you have, and then see if there is some reasonable way to try to increase the number of email addresses you have in, say, the next six weeks. What can you do pretty quickly to go from where you are to where you would like to be so that when you start sending out these messages we are going to talk about in October and November leading up to December, you are really hitting a good group of folks?

So hopefully you have already done the basics, like you have an email signup box on your homepage, and hopefully on every page of your website. You are already asking people for their email address anytime you ask them for any other contact information. So any kind of form that you have out there, whether it is for volunteers or applying for services that you provide, or donating, whatever it is, any of your mailings that go out, any cards that go out with a form, you have got that space for the email address. So hopefully you are doing a lot of those things and those are starting to fill in your database.

But if you also…you want to really put some emphasis on it in the next six weeks. You are going to have to put some manpower behind it. One thing that I recommend that you do, especially if you are a small organization…

Some of this is not going to work if you have got thousands and thousands and thousands of names on your list. If you have got a manageable number that you don't have email addresses for, one thing you could do is print out that list. Tell your board members to bring their Blackberry's to the next meeting and actually set aside time on your next board meeting to go through the list and append the list by hand. Have your board members sit there and actually do it. If you ask people to do this stuff on their own time…

We all know how this works. You might have two or three of your board members that are solid and will do their homework for you on their own time, but a lot of folks just don't have the time. And so they have made time for your board meeting. You have to decide how they are going to use your time at your board meeting.

Tell them to bring their Blackberry's, address books, or whatever and fill out the list right there on the spot; append the list. Do what you can. That is something that we are going to be doing at an upcoming board meeting for this group that I am working with.

Then once you have filled in as many of those email addresses as you can, start to think about who these people really are and how you can segment them, because your appeal in December is going to be much more effective if you are really customizing it to the people on your list.

And there are lots of different ways that you can segment. If you have lots of different programs that you run, some people are going to be more interested in one kind of program than another. And if you have that kind of information in your database, that is an easy way to segment people.

You can also do it by how long they have been on your list if you have that data. You might want to tell people who have only been on for the last year something a little different than the people who have been on for five years. So that is another way to think about it.

The way that this organization I am working with, the way that I am pretty sure we are going to go, is to look at how much people have given, or if they have given to the annual appeal in the past. And we are taking data; even though we are going to be doing a lot of this over email, we are also going to be doing it through snail mail. And so we are looking at the data in both ways, both online giving and through the mail.

And we are probably going to break it out as something like people that haven't given in the last five years, people that have given but they have only given maybe $20 or $30, or even $50, and then a third group would be the prospects who have given $100 or more.

Now for the small community that I live in, those numbers work. For your community and your list, you may need to adjust those. Maybe a small gift is considered anything under $250 or $500. You need to break that out in a way that is going to work for your organization and the kind of giving patterns that you already have with your supporters.

Then once you have got that together, you have got as many email addresses as you think you can possibly get, you have really analyzed your list and figured out some different ways to break it out, the next thing I recommend is step two, which is really thinking about the schedule.

Now normally you wouldn't go straight to the schedule. If you are doing a more well considered marketing plan, you would think about what you want to say to these people first before you start getting into the tactics about how often you say it and what tools you use to say it.

But again, this is quick and dirty reality based marketing here, so we are going to start with your capabilities. OK. It is September 15th. So we have got the rest of September, we have October, and we have November. At the end of November you have got Thanksgiving, so that sort of knocks out some time there where people are not going to be thinking about you.

So you really only have about two months to really prime the pump if you are looking at December as really being the month where you start to really do the more aggressive asking and appealing for donations.

So what is realistic for your organization to give to the people on your list that you just looked at and segmented within those eight to 10 weeks, however you want to gage it there? How many emails can you realistically send out? Again, this is going to vary depending on how many you are already sending out and what you are already used to. If this is something that is very new to you like it is with the organization I am working with, I am going to be thrilled if they can do one really solid amazing email in October and another in November before we do the appeal.

It is a small organization. We just got them set up with Network for Good's EmailNow and DonateNow programs in the last year. We have sent a few emails, but they haven't really made it a habit yet like I want them to. So I just don't think we could possibly do more than really one a month. So that is what we are going to do because that is what is realistic. We are going to craft those emails to work that way; just one in October, one in November, and then probably two appeal emails in December.

So go back and figure out what you can really do. If you can do more than that, then that is great. Maybe you want to try to do two in October and two in November. But think about what is realistic for you.

And then you also really need to think about how this is going to mesh in with everything else that you are doing in the fall. You can’t just have an email campaign running over here on the side by itself. People aren’t going to see that as something separate and different from everything else they are getting from your organization. So you need to be really thinking about how these special emails are building up to your appeal in December fit in with everything else that you are sending them now.

Are you already sending a regular print newsletter, for example, to your supporters? Are you going to change the content of that newsletter to effectively be your fall campaign or are you adding the fall campaign emails onto a newsletter? You need to work this out so it all makes sense together. You can’t just look at them as independent channels through which you are communicating.

The same goes for anything in print that you have going out. If you have got a print newsletter still, or you are doing a postcard campaign, or you are going to be doing some print appeal letters, again, you need to make sure that all of that is working in concert with each other. You don’t want what you are putting in email to not have any relationship with what you are putting in print. So again, think of when stuff is going out and what you are going to put where, and make sure that it is all matching together.

Now in addition to the scheduling of the different materials that are going out, you also want to be thinking about your capacity to provide some special bonus material, if you will, this fall. So are you having any special events that you could invite people to? Can your executive director do a special teleconference briefing like this one? That is especially nice if you have people all over the place and not in a real tight geographic area. Can you do a little webinar maybe? Can you create a special download for people on your list?

You really want to get in the gift giving mode yourself. This is all about getting people ready to give a gift to you in December, and so it is helpful to get yourself in that mindset as well and think, “OK. What can we give to our supporters that they are going to love and that is going to be really helpful to them?”

So once you have thought through some of these scheduling conflicts you may have, how you are going to get everything to mesh together, what time you have to create some of these extra bonus materials for your supporters, then you want to go to step three, and that is really thinking about the content of these emails that you are going to be sending out this fall.

So again, we are focusing on December appeals here. Before you can get into leading up to that appeal, it is a really good idea to know what that appeal is going to be. And the more specific and clear that you can be with people about how you are going to spend their money, the better off you are going to be.

Now I know everyone wants to raise unrestricted general support, and that is great, but you still have to give people a sense for what you are going to do with the money. So think about that December appeal first before you start constructing your October and November email. Figure out what it is that you are really asking people to do in December. How much are you asking for? What are you asking them to fund? Are there going to be any options there or are you really trying to fund one specific thing?

Go ahead and try to make some of those decisions now so that when you construct the lead up emails this fall, it all comes together and makes sense this December. So once you know what you are doing with your ask, then you can start backing up into the rest of September, October, November, and maybe early December depending on how you are going to put your schedule together.

So what do you put in these emails? Let’s just say you are going to try to do two or three of these emails leading up this fall. Well you don’t want to ask for anything, money anyway. I would say at this point, unless you already have a very well defined email program where you are asking for money throughout the course of the year, if you are really just doing this for the first time or you are really just trying to use this December as an experiment in online fundraising for your organization, I would say don’t ask for money in October and November. Really use those emails more as a cultivation device to really get people ready to give in December.

So what do those look like? Well, share your success stories to date. Penelope Burk has a book called “Donor-Centered Fundraising,” which I highly recommend. It is not the cheapest book available, but it has great statistics and great research in it. And one of the points that she makes with her research is that people who give who do not give again, the reason they don’t make the second gift comes down to two things. One, they don’t feel like they were adequately thanked. And two, they don’t know what you did with their money. They don’t know what the results are. They don’t see the success from the first gift, so there is no incentive for them to give the second gift.

So when you are doing this cultivation of your donors in between asking them, that is really what you need to be doing is those two things, is thanking your donors, making sure they realize how important they are and how appreciated they are, and how much an essential part of the team they are. And the second thing is sharing those successes and making sure that they realize that when they give to you, you do something with it, you make something happen, and they are a part of that, and they bring about good things by giving to you. That is really what you want to be doing with these October and November emails.

So things like success stories. I teach a nonprofit storytelling class at Nonprofit Marketing Guide where we go through three different basic plots, and two of these are perfect for sharing success stories.

So the first one is the basic challenge plot, which everyone understands. It is your typical three act structure. So you introduce a character, we meet this person, we learn all about this person's goals and challenges. Then something bad usually happens. There is some barrier that this person is trying to overcome.

This is Act 2 where we are just not sure if this person we have been introduced to now is going to be able to make it in the world. And then in Act 3 that is usually where the nonprofit comes in and we see that our person overcomes those barriers and succeeds, and really heads off into the sunset with a beautiful life; whatever it is.

So it is this basic three act structure and it is a perfect way to tell a success story for your nonprofit. So you don't open necessarily with what your staff is doing. You open up the story with someone that you are helping in some way. And this is going to be easier for some nonprofits than for others. Those of you that do direct community service, social service work, working with people day in and day out, or even working with animals day in and day out, this is going to be much easier for you. Those of you that do more policy related work or research, or even advocacy, may have to struggle a little bit more to find the right story.

But you need to be able to really show the impact. And if you can find one person to talk about, to show that impact, it is going to be much more effective. So tell that person's story. Explain their problem, their struggle, and how your organization is helping them overcome.

You don't want to present your organization as the knight in shining armor. That is not really the goal here. The goal is to show yourself more as the friendly helper that is helping this person achieve. And then we make sure that the donor realizes that they are actually the ones that helped this person achieve their goals by donating to your organization. Your nonprofit is really just the supporting cast.

So that is one easy way to share a success story. Another one is what we call the creativity plot. And in this one it is a little bit different. In this plot you have a problem that everyone understands, and you have a typical conventional wisdom solution that really just doesn't work. And your nonprofit comes in with a new way of doing things that works better. And so it is a really creative way to solve a problem.

And that is another nice plotline, nice technique to use to talk about your successes. So you outline the problem. You say what everybody else thinks is the right way to solve it that just doesn't work. And then you talk about your solution and the difference you have made. And again, if you are using one person's story to really illustrate that, all the better.

So those are two ways to share successes: the challenge plot and the creativity plot. As I said, you also want to be thanking donors for their past support. And so one of your emails might be talking about some of the other donors in the community, or maybe you have different community organizations or churches or whatever, community groups, that fundraise for you; schools, whatever it may be. So you might highlight some of those and give them some extra thanks and encouragement and make clear what their money that they donated to you was spent on. Again, you always want to be tying back the success stories and the thanks for giving.

You might also think about an email that helps create more of an emotional connection. So it is not necessarily the pure success story like we talked about. Instead, you might want to do a profile of a person that your organization has helped, or maybe a donor. Have them tell the story in their own words and connect these other donors to them. Help them really see that they make a difference in these peoples' lives.

There, again, are lots of different ways to do that. You can use these more dramatic elements like I have already talked about with the challenge plot or the creativity plot. Or you can just simply have this person tell their story and talk about how they felt before they got involved with your organization and received the assistance from your group, and how they felt afterwards. And I have a lot of information on Nonprofit Marketing Guide about writing profiles. So if you want to go with that approach and really try to do these nice little personal stories in your email, you can find some more advice about how to do that at Nonprofit Marketing Guide.

Another approach that you might take in these October/November emails is really to try to position yourself as a very helpful, friendly, and effective organization. In other words, an organization that is really worthy of the trust of your supporters. And when supporters give you money, whether they are writing checks or doing it online with their credit cards, they are trusting that you are really going to do the right thing with that money.

And so one way to really kind of build up that sense of trust is to really present your organization as a friend to that donor. And friends don't just ask friends for money all the time. They don't become friends very long if that is the case. What you do instead is build up a relationship over time where you are conversing back and forth with each other, you are sharing information with each other, sharing help and resources with each other.

So one way to do that would be to come up with a "how to" article, something as simple as a "how to" article that shows that you really understand that your supporters want to be able to do something on their own in their own life to help you achieve your mission.

So maybe you work with animals; maybe you work for a humane society, so you have got tons and tons of "how to" articles that you could share with your supporters about how to be a better, more responsible pet owner. So that would be a really easy one.

If you work for an environmental cause, it doesn't necessarily have to be something directly related to your mission as long as it is related enough that people are going to associate that with you.

So if you are an environmental group, maybe you have an article that tells people how to identify the different birds in your community. You may not be a bird organization, but if you are trying to protect the environment and you know that the people one your list are interested in doing something in their own lives, then something as simple as how to identify whether that is a Red Tail Hawk in the sky or not can be helpful to those people, and can really show them that you are thinking about them as people; you are not just thinking about them as ATM's.

So really get creative and try to step back a little bit. Go back to your list and really think about who is on your list. And think about what those people might like to do in their own lives to help you implement your mission, and give them a nice empowering "how to" article to do it.

All of these things I am mentioning here are reinforcing the relationship between your cause and your supporters without asking them for money, and without really asking them to do much.

Now I strongly recommend that you always have some kind of call to action in every email that you send. But there is a big difference between always having a big fat "donate now" button at the bottom and asking them to do something a little softer like learning more, for example. That is sort of the default call to action. If you don't have anything else to ask them to do, you can ask them to learn more about a particular program or topic, and have something on your website related to what is in your email.

So include those call to actions, but in these October and November emails, don't make them "donate now" call to actions. Make them things like "learn more", or "fill out our survey", or "come to our event", or "sign up to participate in our teleconference briefing with our executive director", or whatever it is. Give them an opportunity to relate more back to your organization on something other than a financial transaction. That is what you are really trying to do here is to solidify those connections so that when you do get around to asking for money they are ready and they feel good about you, and they don't mind you asking for money because you are friends and they are willing to give their friends $50 or whatever it is.

OK. So those are some ideas for different types of content. Another idea I want to throw out there for you to think about, still under step three here, thinking about content, is the kind of tone that you are going to use. And this is something I have been thinking a lot about lately as I have been working on the book and I have got a webinar we are going to do on this. Which emotions are going to drive people to help you? And there is a real dichotomy in the nonprofit world between the negative and the positive.

So there is this whole sort of messaging that is really kind of fear based. You may not think of it that way, but essentially when you send out a message that says, “This bad thing is going to happen unless we do something about it,” that is a fear based message. You are trying to sort of scare people. However politely you may be doing it, you are still tying to scare people into giving you money or helping you in some way so bad thing over here doesn’t happen.

There are also these desperation messages that nonprofits are sending out that are usually related to the economy. I haven’t seen as many of these lately, which is a good thing, but these are the sort of messages where, “We are going to have to close down because we can’t pay our light bill,” or, “We have had a huge surge in people who are coming to our food pantry and the shelves are bare.” You know those sorts of messages that are sort of desperate.

And again, I know I am labeling them fear and desperation and that has a negative connotation to it. I am not saying that those are always bad ways to go, but I think you can only take those so far. And they can certainly work when done well, but I don’t think you can do them for very long before people start to get a little bit of the, “chicken little the sky is falling” kind of vibe from you.

So think about if you have got a message like that that can work for you. If you are going to use sort of fear or desperation motivations, you absolutely must give them a positive way to respond. Your call to action has to very much be about getting rid of that fear or getting you out of that desperate situation. You have really got to let people realize that by taking this action, they can solve the problem in its entirety.

On the other hand, you have got the more positive hope, love, “We can do this” more positive messaging. And even if you use some of the fear based messaging sometimes, the more positive stuff, I think, long term is going to work better for you, and especially when you are doing a December appeal.

And it is the holidays, whether people are celebrating Hanukah, Christmas, or Kwanza, or whatever they are celebrating, it is a much more hopeful time of year. That is the mindset that people are in. And even if they don’t have any kind of religious affiliation whatsoever, it still happens at the end of the year. We have got a new year coming upon us; that is always a source of hope for people that they can start off fresh.

So your December appeal really should be more of a hopeful message. And you need to lead up to that and prepare people for that. So again, just be thinking. I am not saying that fear is necessarily the wrong way to go. I just think you have to be much more careful about how you use it. But give some thought to the emotions that you are using.

You have to use emotions in your marketing. Stats alone are not going to do it. And so be very cognizant of that and be very clear about which emotional buttons you are really trying to push with your communications with your supporters.

OK. One more thing on content and messaging and then we will go on to step four. The last point I want to make is to really consider who the best messenger is. And the best messenger may or may not be your or your organization.

If you go back to the campaign, the presidential campaign, whether you were a McCain supporter or an Obama supporter, they were both sending you email, and all of those emails weren't from the candidates. They were both using surrogates in their email. So you might get an email from Bill Clinton or whoever else for the Obama campaign. And you got the same thing; you got emails from Republican congressman for McCain.

So think about whether there is a better messenger. Now you can actually still send that email through your system, but you would change the "from" line on that email and it would really be from that person and their tone of voice, probably have their signature, their photo in the email.

It doesn't have to be a famous person. This is a great place to think about inserting your clients, the people that you are serving or helping in some way. So again, if you are doing some of these profiles, or if you are doing a piece that you really mean to be more of a thank you piece, you can have that client actually do the thanking and explain their story and explain how meaningful and essential the donors are to helping them turn around their own life or whatever that challenge was.

Really make that personal connection where, again, you are really taking the nonprofit out of the main story. Your organization is not the main character here. It is the person you are helping and it is the donor, and you are just sort of the go-between, that wonderful, amazing, magical go-between that brings these two people together and really makes these good things happen. So also consider the messenger there.

OK. Step four; we are going to do step four and then we will start taking some questions. Step four is to really think beyond hitting the send button. So what happens when all these emails go out into space and start landing into peoples' email boxes? And then what do you want them to do next?

You have got to make sure that you have all of that ready to go and in place before you actually hit send. So your website had got to make sense given what you just put in your email. Lots of times people will delete the email; they will catch a little bit of the story. They will want to go to your website and find that story. So you have got to make sure that everything that you are sending out on email is also on your website somewhere that is easy for them to find.

You want to make sure that those landing pages match up. So when you are doing these different email campaigns, it is a good idea to create a special page on your website that is just the landing page for that email. It helps you with all kinds of statistics and tracking. It helps you do testing. If you just send them straight to your homepage or to your "donate now" page, it is harder to really sort out what worked. And by really making a specific landing page on your site for each email campaign, you can make those two match without really mucking up the rest of your website. So create that landing page that has the same kind of stories or images that is in the email so people understand that they are in the right place.

You want to make your donation process as easy as possible. Fundraising 123 and Network for Good have tons of information for you about how to make sure that your donation process works for people and is easy, how much information you should be asking for, what else you should have on the “donate now” page. All of that information is available to you, so I am not going to go over it here, but go find it.

You want to make sure that your website is answering the question, “Why give?” And you don’t have to have a page that actually says, “Why give?” although you could. But you want to make sure that the landing pages and other parts of your website are always answering that question for people.

Think about what statistics you are going to review and what you are going to do with that information. So if you see that a certain group of people is not opening your email in October, is that going to change what you do in November or December?

It may or may not. It depends on how you are approaching this, and what you are saying, and what your goals are. But for example, if you are finding that people are not opening October and November, odds are they are not going to open that December appeal either. And so you might need to look at messaging those people differently. You might need to think about doing something through the regular mail or phone calling them. You need to just keep track of who is doing what.

Now obviously, the smaller your list, the easier it is going to be to get down person by person, supporter by supporter. But you need to think about what you are going to do with those statistics and what your response is going to be if you see certain types of trends in your data.

Think about what your follow-up campaign is going to look like. So we are talking October, November, December here, but what happens in January, and February, and March? You don’t have to nail all that down now, but you need to make sure that at some point here this fall you start creating those campaigns as well, because you really want to keep the conversation moving, keep everything flowing back and forth between you and the donors.

January, you have got to send out a big thank you message to folks. It is just a given. You are doing this big appeal in December. You do the immediate thank you when they give that is more like the receipt, but you really want to be thanking people a lot in January for what they just did for you in December. So start thinking about the next three months.

And I think that is a manageable chunk of time. When I am working with small organizations, we usually talk about three months at a time because it is something that is conceivable; it is easy to work with.

Also think about whether you have a plan to move people to monthly giving, especially your first time givers. That is a good opportunity to go in and say, “Hey, did you know we have this monthly giving program?” Suggest they give $10 or $15 a month.

So in conclusion here, always be asking yourself, “Why are these people important to us other than as financial supporters? And why are we important to them? What are the supporters getting out of their association with us? How do we make them feel about themselves and about their lives? What are we giving them?” And this goes back to that gifting mentality I talked about earlier. “What do they really get by being a part of our organization and being a supporter?”

And really use your email and your communications programs to create that long term relationship to and to create that conversation. If it is something you haven’t done before, now is the exact perfect time to start by creating that fall plan and doing that appeal in December.

And with that Rebecca, I am done blabbing and I am happy to take questions.

Rebecca: Excellent. Thank you so much Kivi. And thank you to everyone who has already sent in your questions. We have quite a pile to jump into, so I am excited to get going.

The first one is just a quick one I would like to make sure we cover. Let’s see, it was from Beth. She just wanted to know if you could repeat the title of the book and the author that you mentioned earlier.

Kivi: It is called “Donor-Centered Fundraising” by Penelope Burk.

Rebecca: Excellent. That was a quickie. I just wanted to make sure that we were spreading the right information.

Kivi: Right. You are going to have some sticker shock. It is not cheap. It is like $60 or $70, I think. But it is packed with information. It is worth it.

Rebecca: We have a question from Dave. Dave says, “In recent years we have taken steps to improve and expand our grassroots fundraising program. A variety of sources have advised us using a limited number of emails as part of a coordinated multi-contact strategy, and that having too many emails asking for money can deaden the response. However, our experience on our list is that we have succeeded the most in bringing donations in over time when we just ask, and ask, and ask, and ask, and ask, and ask, and ask. I am interested in any feedback or insights you have on this.”

Kivi: Well I think you have to go with what is working for you. Everyone is different. And when you listen to calls and listen to people like me and Katya and everybody else talking about how to do this stuff, we are really just talking about best practices, as much as I hate that terminology.

What works for you is what works for you. So I would say if what you are doing is working, then go for it. You want to make sure that you are testing and keeping track of what is happening. But if it is working for you, I would say fine.

Now with your experience, there are two points I would make. The first is that you have to ask. And a lot of nonprofits don't really ask or they ask in this very sort of around…they talk around it. They are not really clear.

Lots of times when I review emails for clients or folks I am coaching, it is a very sort of, "Well if you feel like it, go ahead and think about donating to us." That is not the way to do it. So the first thing is you have to ask, and it sounds like you are asking and people are getting it. So that is good.

You were talking about a multi-channel campaign. So it sounds like you are communicating with people more than just these asking emails. And if all of that other stuff is really great stuff, then maybe people don't feel like you are doing nothing but hitting them up. I think that is what you are trying to avoid. You don't want people to feel like the only time they hear from you is when you are asking for money. You have got to give them something in return, even if that is just the thank you's and the success stories.

Rebecca: Our next question comes from Jackie, and Jackie says, "We send out one email a week that talks about programs that are coming up in the following week. Can we use those to prepare our supporters for an appeal in December? We really want them to open that appeal. And also, do you have any recommendations for subject lines for something like that?"

Kivi: You certainly can. And if people are already used to getting an email from you on a weekly basis, then throwing in some extra emails like we have been taking about today is probably not going to be the best approach. I would say go ahead and use that weekly email and just start to change it up a little bit. Maybe add an extra little story. Add a new sidebar or whatever it is just to kind of tweak that little bit to include some of the tips that we talked about today, so that when you do get to the appeal, people are ready.

If you are only using that to talk about what is coming up next week, I think you can certainly expand that a little bit and start to include more of the storytelling that we talked about. I think that is probably the approach that I would go with.

And then subject lines was the other question, right?

Rebecca: Right. And Alisa actually just chimed in there too and asked for a suggestion for how to approach the subject line for some of these email campaigns.

Kivi: OK. I don't think that there is anything special about these emails that we are talking about versus any other email that you would send. And this is probably a good time to plug the email marketing guide that I did with Network for Good. It is called "The Nonprofit Email Marketing Guide."

If you want to tell them where to find that on Fundraising 123, that has a whole section that is on nothing but micro-content, which are basically our subject line and your headings. And there are lots of tips and advice in there. That is a free guide from Network for Good that you should all have because it is the basic how to do email marketing guide that we put together.

So Rebecca, why don't you tell people how to find that?

Rebecca: Absolutely. Just as Kivi mentioned, it is free for download. Share it with colleagues; share it with other friends in you network. If you go to fundraising123.org, which is our learning center, on the left in that bar of boxes there is one that says, "Email Fundraising Guide" and there is a little money bag and things, and there is a download button. So if you just go there you can download it for free. So again, it is fundraising123.org, and then just click on the Email Fundraising Guide banner that is on the left.

Kivi: Just so you don't feel like I am putting you off and making you go do this download, which you should do. Anyway, but you want to make sure that it is interesting and it peaks peoples' interest. Shorter is usually better, although some people have had success with really long ones. But shorter is generally better. Specific to that email is generally better, although some people do just fine by putting, "Our Newsletter Spring 2010." I have not had success with that ever, but I have people who have commented on my blog that they do just fine with that. So again, you have to go back and test. But being specific; using something that is going to peak peoples' interest. This really goes back to knowing who is on your list and appealing to what they care about.

Rebecca: We have a question from a different Beth, and Beth would like to know, "Do you think it is acceptable to make phone calls to donors to get their email addresses, perhaps a squad of volunteers doing the calling?"

Kivi: Sure. Absolutely. That could be another little thing you do with your board members. Or if you have got a good group of volunteers, just set up a phone bank. It is good to have something else for them to say, so maybe you can give them a little story that is sort of a quickie success story.

People don't want to be on the phone forever, but if you give them something that they can spit out in 60 seconds, something like, "Hey Dave. We just wanted to let you know thank you for supporting our organization. And we wanted to let you know that this nice little good thing happened. And by the way…" especially if you are transitioning out of your print email or your print newsletter, you could say, "We are going to stop doing our print newsletter to save money and trees and we really need your email address."

Also make sure that those people understand what you are going to be sending out, because right away the gut reaction of that person is probably going to be, “Ugh. They are going to send me a bunch of spam.” So you want to have that person on the phone say right away, “And we are going to send you a newsletter once a month or once a quarter,” whatever it is going to be, “and this is what is going to be in it.” And explain to them exactly what they are going to get.

Explain that you have a privacy policy. And this is another reason why you should download the seven steps guide, because there is a sample privacy policy in there. And of course you have to comply with that. You have to not rent, sell, or otherwise distribute your email list to third parties. But tell people that. And if you do all those things, most people will give you the email address.

Rebecca: We have a question from Yu-Lan, and Yu-Lan says, “We always send thank you letters that not only thank them but also tell them how their money is spent. However, we are still having problems with donor retention. Do you have any other suggestions?”

Kivi: Well that is a very good start. My question would be how often you are communicating with people beyond that initial thank you letter, because you really do have to kind of keep the lines of communication open. Just doing they give you a gift, you send them a thank you letter with some success story or how you used it, that is fabulous, but you have got to keep going on from there.

We talked about this little three month period here on the call today of October, November, and December. You have to really replicate that through the other quarters of the year, too. It has got to be an ongoing communication back and forth between you and your supporter.

So that would be, I think, the first place I would look, to see if you are communicating consistently with people over time and what you are giving them, if you are really coming back with more success stories, more ways that they can help on their own, back to the sort of empowering “how to’s” that we talked about. That is the first place that I would look to see where you could make some improvements.

Rebecca: Our next question comes from Gimbiya, and Gimbiya says, “Thanks for this great call. One of the things that has been spoken about a lot is segmenting the contact list by interest areas, how long they have been on the list, etc. Since last year, my organization has been more intentional about collecting email addresses and adding them to our email newsletter service. However, the list has not been segmented, so I am facing a list of about 3,000 people that are lumped together in this giant list. Just the thought of segmenting it is overwhelming. Is there a six week down and dirty plan for tackling this?”

Kivi: You know, the thing is you are going to have to do it by hand. I mean unless you have that data already in another form, like somebody has got some Excel spreadsheets somewhere or something that has got the data by some unique field, whether it is the name or the email address, unless you have that and kind find somebody that is really good at merging data, you are just going to have to do it by hand.

I feel your pain. The organization that I am working with here locally, our list isn't as big as yours, but we pretty much had volunteers go record by record. We had all of our donations information in one place, contact information in another place, people who donated one year over here, people who donated another year over here; it was in like four or five different Excel spreadsheets and we just had some volunteers that really cared about the mission go through and actually compile it all.

If you don't have the data in a way that can be electronically merged easy, there is just no other way. Do the best you can. If you can't do all 3,000, try to do 500 and go from there.

Rebecca: That sounds like a more reasonable goal, at least for the next six weeks. And then that is great advice for the time after.

Let's see. Our question from Meredith is talking a little bit about other media. And when you talked about storytelling, and particularly through email I think Meredith means, she wanted to know, "Can you use video to tell your story? Do you think that is effective in your outreach?"

Kivi: Absolutely. Video is great. Photos are great. The thing about email is that some people will see the video box there and some people will see that graphic, and others won't. They will just see this empty white space, or maybe there will be a red X there depending on their email provider or if they are looking at it on their phone.

So while I love images and video, you can't rely on that alone. Don't send an email that has just got an embed link for the video. You have still got to include the text there that actually talks about what is in the video. And if they only see the text, the email still has to work. The video, obviously you would want that to be the centerpiece. But if the video is not going to be there because it is blocked for some reason, you still want that text to say something meaningful to the reader.

Rebecca: This question comes from April and it is more about the cultivation after someone does give the gift. April says, "For the big thank you in January, how would you send that out, via the monthly newsletter if you have one, individually, or posted on our website? And by the way, thanks for a great call and great content."

Kivi: Let's just do this like the really easy way. So the real easy way would be to segment who gave, and hopefully you have got information in your tracking so you know who on your list gave, or you can mark that in some way, even if you are having to go by hand if it is not automated; you know who gave. So you are only sending an email to people who actually really did send you money.

And you can really talk about specifically…link it back to that ask. You are asking for money for a specific purpose in December, so you want to go ahead and talk about the progress that you made on that in January and the progress that you are going to continue to make, because obviously if you get the money in December, it is going to take you a couple of months usually to be able to do anything with it.

But tell them that first step that you have already taken towards accomplishing that goal and getting that thing done with their money. And then promise to give them additional progress reports on whatever schedule that you can commit to.

So you might say, "In our March newsletter we are going to give you an update on this," or whatever it is. So that would be one way to go about it. And then you could do a second that is still sort of a thank you, but to people who didn't give you money in December. And you could make that a more generic, "thank you for your support" kind of thing. And really just try to up the cultivation so that when you ask those people again, they are really ready next time.

Rebecca: We have a question from Kristen, who wants to know if you can give a couple examples of bonus materials or gifts from the organization to donors. "You were talking about the follow-up on the thank you. Do you have any ideas for…?" I guess the question is how to make them feel special, and that goes back to our previous question about, "Do you recommend recognition on the website or other such avenues?"

Kivi: Right. Well there are a couple of things. First, I love just simple downloads for people. And I am a big fan of sort of the "how to" or the list; you know, the real useful resource that your supporters can use in their everyday lives.

So even if it is just some little two page PDF that you put together; you spend a little bit of time making it look nice. And you send that as kind of a little thank you gift. You know, "12 ways to do," blah, blah, blah; whatever it is that your organization works on that a person could do on their own time to kind of help with your larger mission.

I really like that. It is very easy to do. It is something that you can use for other purposes as well, and it is just a nice little thank you gift for people.

I also really like photos as part of a thank you. And there are a couple of different ways you can go about this. Again, depending on how big your list is, if you have got a lot of people you might have to break it down and only do the photo for a certain group that has given a certain amount of money. You can segment it to make it an achievable task for your organization.

But especially if you do any kind of human service work, get 10 of your clients, 10 of the people you help, to agree to be featured. Get them to sign the little model release waiver to tell their story and take a picture and send a snapshot with a little insert, little story, about this person. Send that out to people.

People will keep those photos. If you have photos of kids or a smiling person that you helped, you will keep that photo on your desk, because that is what you are really looking for as a donor.

Think about the organizations that you contribute to yourself just in your personal life. You want to make a difference in other peoples' lives. And if you got a photo of a person who you helped, you would keep it.

All of these big child organizations that do the adopt a child; that is what they are going after, is that personal connection that we all want with the people that we are helping when we contribute to charity.

So I would say use photos, make it personal, or give them a little empowering "how to."

Rebecca: Wonderful. Well thank you so much Kivi for all this great information. Thank you to everybody who sent in your questions, and I am sure we can follow up with more resources for you.

So thank you again Kivi, and thank you for being with us today.