MAKING THE MOST OF EMAIL MARKETING

The Right Message, The Right Time, The Right People
ABOUT TODAY'S SPEAKERS…

• Alec Stern – Founder, Vice President of Strategic Market Development for Constant Contact is a primary member of Constant Contact's founding team as one of the original 3 in the attic. Today he spearheads strategic market development and vertical industry thought leadership including Nonprofit and Associations for the company. In the past 20 years he’s held active roles in the nonprofit sector which currently include positions on the Board of Directors, Board of Advisors or Executive Committees for a range of nonprofits including; The Boston Public Library Foundation, The Better Business Bureau and The ALLY Foundation. He also works with many National organizations including United Way, Cystic Fibrosis.
AGENDA

- Engaging Communications
- Importance of personalization and segmentation
- Using the supporter information you already have
- How to gain additional supporter information
- How to use the information to get better email results
- How to further extend your email’s reach and grow your list
ENGAGING COMMUNICATIONS

The Right Message, The Right Time, The Right People
THE IMPORTANCE OF ENGAGING COMMUNICATIONS

You need to stay “top of mind” with your current and prospective supporters

It takes an average of **7 touches** before an action occurs.

59% of people need to hear something about a specific organization **3 - 5 times** to believe that information is likely to be true. – Edelman Trustbarometer 2011

Initial Action Doesn’t Get You The Biggest Payoff

- New supporters cost 10 times more than keeping existing ones
- It’s 5 times easier to win back a lost supporter than to find a new one
- Loyal supporters generate referrals!

✓ An engaging newsletter for **current supporters** is essential.
Supporters want to hear from you and feel connected

- **Supporters want information**
  - In 2010 42% of nonprofits had donors ask to be updated on how their contributions were spent. A significant increase from 32% in 2008. – 2010 State of the Nonprofit Industry Survey

- **Information helps supporters feel connected**
  - The #1 reason existing donors stopped giving to a particular charity is that they no longer felt connected to the organization (57.7%). – 2008 Bank of America Survey

- **Information lets supporters see that their donation is making an impact**
  - Just less than 20% of donors believe that their donations make a major impact on the organizations they support. – 2008 Bank of America Survey
“80% of recipients Stop Reading emails they have signed up for because they deem them Irrelevant.”
– Study by the Ad Agency Quris

Have Relevant Content By Segmenting

What different groups of supporters do you communicate with?
- Donors
- Volunteers
- Board Members
- Event attendees

What are their interests/preferences?
- Email/direct mail/social media
- Frequency preference
- Events
- Volunteer opportunities
- Certain programs
- Activism

Capture supporter information needed to segment your list and be relevant.
- Use your sign up forms to let them identify themselves
- Use surveys to know their interests and passions
BREAKING DOWN THE COMPONENTS OF A CAMPAIGN

Have the most interesting topics and most recognizable names appearing here to pull that segment in.
• Getting the Frequency Right

Frequency should be driven by:

- How often can you produce fresh, interesting, relevant content?

- What your supporters groups want
  - How often do they want updates?
  - Use your subscriber survey to find out
  - Test frequency you send and watch email metrics

How frequently are other nonprofits emailing?
- #1 - Monthly (43%)
- #2 - Every other week (17%)
- #3 - Quarterly (16%)

-2011 Nonprofit Marketing Guide
WAYS TO USE SUPPORTER DATA – IDEAL FREQUENCY

**Tocqueville Society Email - Quarterly**

Welcome Carmen Bermúdez & Tom Feeney, Co-Chairs Tocqueville Society 2007

Thank you Mark Rubin, 2005-2006 Tocqueville Chair


The event was held at Skyline Country Club’s Crown Room at 5:30pm in the evening.

Tocqueville Society members heard about United Way’s Financial

**Tax Volunteers Email - Monthly**

Hello Task Force Members and VITA Volunteers!

The United Way EITC Staff is so pleased to present the second edition of our electronic EITC Newsletter.

We hope this can be a good tool to share news about EITC, our partners and our volunteers.

Thank you for all those people who read and helped pass on the information in the last issue.

In the future please feel free to suggest events, stories and news to be shared in EITC News.

Tax Volunteers Email - Monthly

EITC News

July 2007 – Issue #2

VITA Tax Instructors needed

‘06 VITA Training Report

Statewide/Region Directors

Volunteer Issues

The EITC Task Force Enters Its 5th Year

Thank You!!!

Steven Meyeroff
VITA Volunteer Coordinator

Note: EITC Campaigns have not yet released their results from the 2007 tax season. EITC will announce the final report.

Three United Way staff members will be attending the EITC Summit in San Francisco July 21-13. Click here to find out more.

This year’s IRS Nationwide Tax Forums will be held in Las Vegas from August 21-23. Click here to find out more.

To learn more about EITC, around county, please click here to visit the National Community Tax Coalition Website.
WAYS TO USE SUPPORTER DATA – IDEAL FREQUENCY

Young Leaders Society Email - Twice Monthly

Speed Networking at Fleming's Prime Steakhouse & Wine Bar!

CONNECT with numerous young professionals from the Tucson area in one fast-paced fun evening. Speed Networking will be done in a low-stress, friendly environment that provides you the opportunity to fine-tune your communication skills and build relationships.

Fleming’s Prime Steakhouse & Wine Bar
6560 N. Campbell Avenue
Thursday, September 27
5:30-7:30pm

Our philanthropic focus is to improve after-school programs throughout the Tucson community.

We ask you to bring art supplies, which will be donated to our adopted After-School Program.

Complimentary hors d'oeuvres
YLS drink special
No host bar
Business casual attire
Attendance is limited for this special event

Please click a link below to RSVP:

Yes! I would like to attend Speed Networking at Fleming’s on September 27.

No, thank you. I regrettfully decline.

Event Sponsors:

United Way of Tucson and Southern Arizona

Quick Links...
YLS Webpages
Volunteer with YLS
Past YLS Events
Contact Us

Click Here to Join Our E-mail Newsletter List

Board of Directors Email – Monthly

Board News You Can Use

Dear Board Member,

Welcome to the second edition of United Way of Tucson and Southern Arizona’s Board News You Can Use electronic newsletter. The purpose of this newsletter is to ensure that you have all the information you need to serve as an effective Board Member.

Below is a link to your Board Materials webpage (not accessible to the public) which provides Board Members with documentation to review before the next BOD Meeting.

Please click here to access your Board of Directors Meeting materials.

Visit the Quick Links Section on the left side of this newsletter to view your United Way’s Calendar of Events, Website and the National United Way Website.

We hope you find this newsletter and the Board Meeting Materials webpage to be user friendly and helpful for your work as a United Way Board Member.

If you have any comments or suggestions please contact Dan Duncan at 903.6000 ext. 810 or duncan@unitedwaytucson.org

See you on the 27th.

Bid Parker
CEO and President
United Way of Tucson and Southern Arizona

Center of Excellence Training Session a Huge Success

“The training in Tucson was superb -- the best I have ever attended”

(Quoted from a Center of Excellence attendee)
IMPORTANCE OF SEGMENTATION AND PERSONALIZATION

The Right Message, The Right Time, The Right People
IMPORTANCE OF PERSONALIZATION

The data collected and used for email personalization by small organizations in this study include: personal name (84%), company name (61%), source of lead (60%), professional title/role (44%), personal or company phone (38%), personal or company address (34%), and demographics (15%).

Email Marketing Benchmark Report, MarketingSherpa 2011
IMPORTANCE OF SEGMENTATION

To improve the relevancy of emails, 52% of small organizations in this study found segmenting email campaigns based on behavior very effective, and 41% found allowing subscribers to specific email preferences very effective.

Email Marketing Benchmark Report, MarketingSherpa 2011

Among those in this study who segment their email lists, 39% saw increased open rates and 28% saw lower unsubscribe rates, 24% saw greater revenue, 24% saw increased sales leads, 24% saw better deliverability, 21% greater customer retention, 15% greater customer acquisition, and 14% improved word of mouth.

Lyris Annual Email Optimizer Report, October 2010
SEGMENTING & PERSONALIZATION

Relevant Emails Get More Engagement

Segmentation and targeting gets higher engagement.

- Send the email only to the appropriate list of supporters who will be interested.

Note: respondents were asked to choose their top three; in the past year Source: Lyris Inc., "The Lyris Annual Email Optimizer Report," provided to eMarketer, Oct 25, 2010
HOW TO USE WHAT YOU ALREADY HAVE TO EASILY PERSONALIZE AND SEND TARGETED COMMUNICATIONS

The Right Message, The Right Time, The Right People
HOW CAN I INCREASE MY IMPACT?

Steps to Segmenting & Personalizing:

1. Use what you already know about your audience
2. Give your audience ways to give you useful information
3. Send emails to segments and design it with them in mind
WHAT DO YOU ALREADY KNOW ABOUT YOUR SUPPORTERS?

- Name
- Geography
- Age, Gender, Income, Occupation
- Level of membership
- Amount last donated
- Program of interest
- Name of event they attended
- How long they have been a supporter
Easily Include Personalization

Use information you have beyond email address

- Include personalization to show you have a relationship with them

**Personalized emails can increase response rates by nearly 60%.**

Include first name, event they last attended, city they live in, program of interest, etc.
CUSTOMER SPOTLIGHT: CENTERPOINTE
CONSTANT CONTACT & BLACKBAUD

• “I love being able to tailor the ask according to whether the message is for current, lapsed or prospective donors.” Abbigail Swatsworth, Executive Director

• “The integration of being able to transfer a query and target our emails more specifically has been great. We love that we can target our emails and have a greater variety of templates and pictures to use.” Emily Leeper, Marketing Intern

• “We love the feedback we get from the open rates and click-through rates. For the first time, we can actually see how our audience is behaving and what they are reacting to!” Emily Leeper, Marketing Intern

• “Having the option to create a more interactive email is awesome, as it strikes the attention of our audience sooner and will hopefully lead to higher click-through and conversion rates.” Emily Leeper, Marketing Intern

• 37% open rate for current donors
• 27% open rate for prospects
• More attention grabbing, interactive emails due to greater variety of templates and the ability to include videos

Customer since: 2010
• They’ve used eTap for over 2 years now
• They’ve been using Constant Contact for about 4 months
• Organization city, state: Lincoln, NE
Size:
• Email addresses: 357
• Active donors: 639
• Website: http://www.centerpointe.org

Tactic:
• Segmentation
• Using video in email
HOW CAN I START TO SEGMENT?

Don’t have a donor management system, but using Constant Contact? Use the advanced search function.

1. Search on up to 5 fields and then click to create a new contact list from your search results.

Search Results

2. Save as a List
HOW CAN I START TO SEGMENT

eTapestry & Constant Contact

You can now work with Constant Contact from eTapestry. We recommend that you start by running a **Database Comparison** to better manage the overlap between your databases.

**Database Comparison**
Scan your eTapestry and Constant Contact databases to find accounts with matching email addresses.

**Transfer Email Addresses**
Add contacts to a new or existing list in Constant Contact using an eTapestry query.

**Manage Preferences**
Update your Constant Contact login credentials and make other integration settings.
SEGMENT FROM A DONOR MANAGEMENT SYSTEM

Create a New Query

Name
All Donors who have given in the past 6 months

Description

Starting Criteria
Category: Base
Query: All Constituents - A

Data Return Type
Accounts

Relationship Info
(None Selected)

Match
All of My Criteria
Persona Options
Any Persona

Type
Dynamic

Criteria
Journal Entry Date
Range Type: Custom Range
Start Date: 1/1/2012
End Date: 6/30/2012

Available Fields
Amounts
Individual Transaction Deductible
Individual Transaction Given
Individual Transaction Item Quantity
Individual Transaction Non Deductible
Individual Transaction Number Segments
Individual Transaction Order Item Discount Amount
Individual Transaction Pledge Arrears
Individual Transaction Pledge Balance
Individual Transaction Pledged
Individual Transaction Purchased
Individual Transaction Raised
Individual Transaction Received
Individual Transaction Soft Credit
Largest Transaction

Optimal Comparison
Greater Than Or Equal To: .01

Optional Comparison
(None Selected)
SEGMENT FROM A DONOR MANAGEMENT SYSTEM

Constant Contact - Transfer Email Addresses

Step 1: Make eTapestry Criteria Selections

What query should be used to locate the accounts to transfer?

- [ ] Base
- [ ] All Donors who have given in the past 6 months – A

Edit the Selected Query

Email addresses should be pulled from which Persona(s)?

- [ ] The Primary Persona only
- [ ] All Personas on the Account
- [ ] All of the Personas I select
- [ ] One Persona, based upon the Hierarchy I select

Step 2: Make Constant Contact Criteria Selections

Which list should these emails be added to?

- [ ] A new list named
- [ ] Choose one of my existing Constant Contact lists

Step 3: Finalize the Transfer

What email address would you like to have a notification sent?

mike.rusche@etapistry.com

Transfer

Note: This process can be resource intensive and may take a while to complete. Only one such intensive process can be running against your database at a given time. Once this process starts, you may safely navigate elsewhere and perform non-query based activity (or logout) and it will continue unattended.
## SEGMENT FROM A DONOR MANAGEMENT SYSTEM

### Query Preview

**Base:** All Donors who have given in the past 6 months

<table>
<thead>
<tr>
<th>Name</th>
<th>City</th>
<th>State / Province</th>
<th>Postal Code</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tallischa Almond</td>
<td>Ann Arbor</td>
<td>MI</td>
<td>48108</td>
<td></td>
</tr>
<tr>
<td>Jose Berrios</td>
<td>South Lyon</td>
<td>MI</td>
<td>48178</td>
<td></td>
</tr>
<tr>
<td>Claire Bradley</td>
<td>Bloomington</td>
<td>IN</td>
<td>46401</td>
<td>(555) 676-1265</td>
</tr>
<tr>
<td>Gail Bunch</td>
<td>Ypsilanti</td>
<td>MI</td>
<td>48198</td>
<td></td>
</tr>
<tr>
<td>John Carr</td>
<td>Noblesville</td>
<td>IN</td>
<td>46050</td>
<td></td>
</tr>
<tr>
<td>Stephen Chambers</td>
<td>St. Louis</td>
<td>MO</td>
<td>63136</td>
<td></td>
</tr>
<tr>
<td>Susan Clark</td>
<td>Indianapolis</td>
<td>IN</td>
<td>46145</td>
<td>(555) 988-7234</td>
</tr>
<tr>
<td>Andrea Cooper</td>
<td>Indianapolis</td>
<td>IN</td>
<td>46220</td>
<td></td>
</tr>
<tr>
<td>Don Cooper</td>
<td>Indianapolis</td>
<td>IN</td>
<td>46217</td>
<td>(555) 123-8767</td>
</tr>
<tr>
<td>Gregory Dumont</td>
<td>Greenwood</td>
<td>IN</td>
<td>46236</td>
<td></td>
</tr>
<tr>
<td>John Ennli</td>
<td>New Palestine</td>
<td>IN</td>
<td>46183</td>
<td></td>
</tr>
<tr>
<td>Jed Finch</td>
<td>Eastpointe</td>
<td>MI</td>
<td>48021</td>
<td></td>
</tr>
<tr>
<td>Alicia Gooche</td>
<td>Birmingham</td>
<td>MI</td>
<td>48009</td>
<td></td>
</tr>
<tr>
<td>Cindy Grant</td>
<td>Little Rock</td>
<td>AR</td>
<td>72211</td>
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<tr>
<td>Anna Hatch</td>
<td>Southfield</td>
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<td>48075</td>
<td></td>
</tr>
<tr>
<td>Eva Huggins</td>
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<td></td>
</tr>
<tr>
<td>Addie Kauffman</td>
<td>Detroit</td>
<td>MI</td>
<td>48221</td>
<td></td>
</tr>
</tbody>
</table>
CUSTOMER SPOTLIGHT: CHAVEZ CENTER
CONSTANT CONTACT & BLACKBAUD

Customer since:
• eTap for just over a year
• CC since December 2012
• Organization city, state: Concord, CA

Challenge:
• Needed a tool to help them to segment their constituent base for e-marketing purposes
• Jacqueline was searching for a way to save money while increasing the center’s outreach and communication – the eTap/CC partnership was the “best of both worlds” solution that helped them to overcome this challenge

Tactic:
• Segmentation
• Currently uses e-marketing to tell compelling client stories; they plan to make emails more interactive in the future by utilizing more pictures, links, surveys, and social media integration
• Analyze results using the Constant Contact dashboard

Results:
• Weekly e-blast to their most active donor group – open rate of 40-50%, peak of 65%
• Overall, the Chavez Center has increased their bi-monthly newsletter readership by 25%, in part because current readers recommended that their friends fellow volunteers join the mailing group as well
• The center now uses the analytical tools in Constant Contact to help them gauge results and plan for future e-blasts

Quote:
• “Integrating eTapestry and Constant Contact has allowed me to better segment my donors, resulting in much higher open and click-through rates from the emails I send to my most active donors.” Jacqueline Elliot, Communications Coordinator
HOW TO GAIN MORE INFORMATION TO SEGMENT AND PERSONALIZE

The Right Message, The Right Time, The Right People
JOIN MY MAILING LIST ON WEBSITE & REGISTRATION

Capture your website traffic and event attendance

98% of visitors don’t convert. - Web Trends Study, 2007

Do you have a sign up box on your website?

- Use an Inviting call to action
  - “Sign up for the Newsletter”
  - “Sign up for Helpful Hints & Tips”
  - “Get our Special Offers”

- Put in Multiple locations

- Put in Visible locations
  - People don’t like to scroll

- As a part of registering to attend an event
  Provide updates to registrants
  Promote upcoming events

- [ ] Yes, I would like to receive your email newsletters
  Register
WAYS TO LEARN MORE ABOUT YOUR SUPPORTERS

- Use a sign up form introduction to increase subscribers

  - To inform of the type of communication to expect
  - To inform of the frequency to expect
  - To assist them in picking the right segment(s)

- Set expectations
  - Frequency
  - Value of being a member of your list

Center For The Arts Intro Snippet:

“Thank you for your interest! Please enter your information below, then choose which email options you would like to receive:

**Art Newsletter:** By joining this list you will receive my **monthly** email newsletter with information about my gallery shows, blog updates, class schedules and encaustic events around the world.

**Portland Events:** This list alert for those living in Portland, Oregon and surrounding areas to my local events like preview parties, special art sales, and open studio events.”
WAYS TO LEARN MORE ABOUT YOUR SUPPORTERS

Use a Sign-up Form to Gain Information to Personalize and Segment Your Supporters

- Post list options that will tell you their interests and which group sign-ups fit in.
  - Just exploring your work, a volunteer, a donor, board member etc.

- Provide existing subscribers an email with a link to your sign-up form.
  🔄 Once they click “submit” they are automatically added into the list(s) they selected.

- Keep It Simple

  About 1/3 of nonprofits made it hard to subscribe.
  - Return Path Nonprofit Study: Telling Stories, Building Relationships 2009

  🔄 Collecting email address, name and main interest will let you start sending engaging communications.
GET SUPPORTERS SIGNED UP

Include Your E-Newsletter Signup Form Link Everywhere

- Website pages
- Donation confirmation pages
- Thank you letters
- Paper newsletters
- Social media sites
- Current email newsletters
- Signup forms at events
- Staff’s email signature

76% of nonprofits placed the sign up form on the homepage. – Return Path Study: Telling Stories, Building Relationships 2009

76% of nonprofits placed the sign up form on the homepage. – Return Path Study: Telling Stories, Building Relationships 2009
GET SUPPORTERS SIGNED UP

- Use Your Facebook Business Page
- Add your own “Join our List” tab to continue the relationship through email
- Write a post encouraging supporters to sign up with a link to your sign up form.
Welcome Email: The most opened email you will send!

- Send immediately
- Establish your brand
- Sound excited
- Make them feel genuinely welcome
- Say “thank you”
- Make it feel exclusive

- Add links: Capitalize on subscriber’s attention
  - Link to past blogs, newsletters, articles
  - Link to volunteer opportunities

Interest, as measured by open rates, starts to disintegrate two weeks after opt-in. Within two months, the open rate can fall 20-25%. The Welcome email can help fend that off.

– Marketing Sherpa 2007

A marketer who responds within 5 days to a lead that has subscribed, increases the “lifetime value” of that lead by over 50%.

– Worldata Email Usage Study Q4 2010
WAYS TO LEARN MORE ABOUT YOUR SUPPORTERS

Use a Welcome Email To Learn More. Survey to Gain Personalization and Supporter Interest

- 62% of nonprofits organizations started the relationships with subscribers off right by sending a welcome message.
- 90% sent them within 24 hours.
Source: Return Path Study: Telling Stories, Building Relationships 2009

Welcome to America the Beautiful!

Dear Marie,

Thanks for signing up to stay informed of all the great impact you are helping America the Beautiful achieve in the community.

We want to give you the content you are most interested in. Please take a moment to tell us what you want.

If you have any questions or comments, feel free to contact us.

Sincerely,

Caroline Shahar

America the Beautiful Fund

email: cshahar@constantcontact.com

Ask for information like:
What is your first and last name?
What supporter group do you best fit into?
What are your topics of interest? Certain programs, services, products, locations.
Are you interested in attending events?
How do you prefer to keep in touch? Monthly e-newsletter, weekly e-updates, social media, direct mail.
WAYS TO LEARN MORE ABOUT YOUR SUPPORTERS

Use Your Current Emails to Learn More.

- Ask supporters what they like
- Ask supporters what they don’t like


Create a special email invite asking for their interests.

Make this Newsletter What You Want

We value your opinions! Please take 3 minutes to give us your feedback. Are there topics that you would like us to shed more light on? Would you like to receive our newsletter more often or less often?

Click to Give Your Input
SEGMENTING & TARGETING
Using the Results of Your Simple Subscriber Survey

Which of the following program(s) are you most interested in? Please select all that apply.

<table>
<thead>
<tr>
<th>Answer</th>
<th>0%</th>
<th>%</th>
<th>100%</th>
<th>Number of Responses</th>
<th>Response Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program A</td>
<td></td>
<td></td>
<td></td>
<td>22</td>
<td>47.0%</td>
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<tr>
<td>Program B</td>
<td></td>
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<td>24</td>
<td>50.0%</td>
</tr>
<tr>
<td>Program C</td>
<td></td>
<td></td>
<td></td>
<td>17</td>
<td>35.4%</td>
</tr>
<tr>
<td>Program D</td>
<td></td>
<td></td>
<td></td>
<td>5</td>
<td>10.4%</td>
</tr>
<tr>
<td>Other (view all)</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>2.0%</td>
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<tr>
<td>Totals</td>
<td>48</td>
<td></td>
<td>100%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Ask questions that will help you segment:
  - Which ways would you like the organization to communicate with you?
  - What frequency do you prefer?
  - Which programs are you most interested in?
  - Which types of information would you like to receive from our organization?

- Responses are tallied for you with online surveys
- Save people with similar interests as a separate list

Tip: You can easily filter on multiple responses to create more defined lists, for example:
    One List = Those interested in **Volunteering and Program A**
WHAT IS YOUR EMAIL’S REAL IMPACT?

Impact Does Not equal the number on your List

Impact =
- Number of opt-outs
- Number of opens
- Clicks on your “calls to action”
- Forwarded emails to a friend
- Number of shares

Impact Does Not equal the number on your List

Impact =
- Number of opt-outs
- Number of opens
- Clicks on your “calls to action”
- Forwarded emails to a friend
- Number of shares

**Emails**

<table>
<thead>
<tr>
<th>Date Sent</th>
<th>Email name</th>
<th>Sent</th>
<th>Bounces</th>
<th>Spam Reports</th>
<th>Opt-outs</th>
<th>Opens</th>
<th>Clicks</th>
<th>Forwards</th>
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<tbody>
<tr>
<td>1/11/2010</td>
<td>Newsletter: Caribbean Island Travel</td>
<td>92</td>
<td>25.0%</td>
<td>0</td>
<td>0</td>
<td>44.9%</td>
<td>41.9%</td>
<td>9.7%</td>
</tr>
</tbody>
</table>

**Social Stats**

7 Page Views

<table>
<thead>
<tr>
<th></th>
<th>Share</th>
<th>Send</th>
<th>Like</th>
<th>Twitter</th>
<th>LinkedIn</th>
<th>(Other)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>

7 Total Shares. Congratulations, your email went social!
USE EMAIL REPORTS TO KNOW WHEN SHOULD COMMUNICATIONS BE SENT?

When is that segment reading your communications?

Watch for trends in your **Opens Report:**

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Status</th>
<th>Opened Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:pchigasit@constantcontact.com">pchigasit@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 10:51 AM EST</td>
</tr>
<tr>
<td><a href="mailto:ssheary@constantcontact.com">ssheary@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 10:47 AM EST</td>
</tr>
<tr>
<td><a href="mailto:jmcaili@constantcontact.com">jmcaili@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 10:45 AM EST</td>
</tr>
<tr>
<td><a href="mailto:kallen@constantcontact.com">kallen@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 10:45 AM EST</td>
</tr>
<tr>
<td><a href="mailto:jslymore@constantcontact.com">jslymore@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 10:37 AM EST</td>
</tr>
<tr>
<td><a href="mailto:slesas@constantcontact.com">slesas@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 10:32 AM EST</td>
</tr>
<tr>
<td><a href="mailto:ndtournier@constantcontact.com">ndtournier@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 9:55 AM EST</td>
</tr>
<tr>
<td><a href="mailto:ndtournier@constantcontact.com">ndtournier@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 9:55 AM EST</td>
</tr>
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<td><a href="mailto:ndtournier@constantcontact.com">ndtournier@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 9:55 AM EST</td>
</tr>
<tr>
<td><a href="mailto:rrmarinez@constantcontact.com">rrmarinez@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 9:35 AM EST</td>
</tr>
<tr>
<td><a href="mailto:mmunes@constantcontact.com">mmunes@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 9:32 AM EST</td>
</tr>
<tr>
<td><a href="mailto:jryon@constantcontact.com">jryon@constantcontact.com</a></td>
<td>Active</td>
<td>2/1/2010 9:31 AM EST</td>
</tr>
</tbody>
</table>
USE EMAIL REPORTS TO KNOW WHAT TO SEND

• Use the **Clicks Report** to see if it appealed to the segment as you wanted.

• Measure effectiveness with the calls to action
  - Identify the most appealing
  - Identify the least appealing
  - Save the unique click-throughs as a sub-segment

---

**Email Name: Newsletter: Caribbean Island Travel**

<table>
<thead>
<tr>
<th>Email Link</th>
<th>Unique Click-throughs</th>
<th>Click-through Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://caribbean-guide.info/past-and-present/culture/">http://caribbean-guide.info/past-and-present/culture/</a></td>
<td>7</td>
<td>20.0%</td>
</tr>
<tr>
<td><a href="http://www.1000traveltips.org/index.html">http://www.1000traveltips.org/index.html</a></td>
<td>12</td>
<td>34.3%</td>
</tr>
<tr>
<td><a href="http://www.exclusivecaribbeanvillas.com?keyword=content_villa_rentals_jamaicaa&amp;WT.ac=google&amp;WT.z_author=blackbaud">http://www.exclusivecaribbeanvillas.com?keyword=content_villa_rentals_jamaicaa&amp;WT.ac=google&amp;WT.z_author=blackbaud</a></td>
<td>8</td>
<td>22.9%</td>
</tr>
<tr>
<td><a href="http://www.luxuryretreats.com/villa/africa/moroccocas/">http://www.luxuryretreats.com/villa/africa/moroccocas/</a></td>
<td>8</td>
<td>22.9%</td>
</tr>
<tr>
<td>Total Click-throughs</td>
<td>35</td>
<td>100%</td>
</tr>
</tbody>
</table>
Gain Insights By Adding Links

Use teaser paragraphs and link to the full content stored somewhere else.

- On your blog or Facebook business page
- On your website (just as easy as adding an image)
  - Content on a page of your site
  - Word or PDF document hosted on your site
- On another website (e.g. CNN)
- Document hosted online (e.g. Constant Contact)

✔ When readers click they will see a new window with the webpage or document you choose.
Connect the right supporters with the right content on:

- Website
- Blog
- Youtube channel
  - Video in email increase clicks by 2-3 times (Forrester)
  - Video increases subscriber engagement by 20-200%. (Visible Gains)
  - Video results in a 75% reduction of opt-out rate. (Eloqua)
- Facebook page
  - Those age 55 and up is the fastest growing segment of Facebook users. (comScore 2010 U.S. Digital Year in Review)
## USE EMAIL REPORTS TO KNOW WHAT TO SEND

### Email Stats

<table>
<thead>
<tr>
<th>Email Name</th>
<th>Sent</th>
<th>Bounces</th>
<th>Spam Reports</th>
<th>Opt-outs</th>
<th>Opens</th>
<th>Clicks</th>
<th>Forwards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discover! Connect! Take Action! May</td>
<td>684</td>
<td>3.2%</td>
<td>1 (22)</td>
<td>0.1%</td>
<td>36.1%</td>
<td>22.6%</td>
<td>0</td>
</tr>
</tbody>
</table>

### Click-through Stats

<table>
<thead>
<tr>
<th>Email Link</th>
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<tbody>
<tr>
<td><a href="http://girlscouts.org/for_adults/parenting/articles/self_confidence.asp">http://girlscouts.org/for_adults/parenting/articles/self_confidence.asp</a></td>
<td>10</td>
<td>26.0%</td>
</tr>
<tr>
<td><a href="http://groups.yahoo.com/group/gsocsw/">http://groups.yahoo.com/group/gsocsw/</a></td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td><a href="http://twitter.com/gsocsw">http://twitter.com/gsocsw</a></td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td><a href="http://www.facebook.com/GSOcSW">http://www.facebook.com/GSOcSW</a></td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td><a href="http://www.girlscouts.org/program/journeys/your_story/">http://www.girlscouts.org/program/journeys/your_story/</a></td>
<td>4</td>
<td>5.5%</td>
</tr>
<tr>
<td><a href="http://www.girlscouts.org/research">http://www.girlscouts.org/research</a></td>
<td>2</td>
<td>2.7%</td>
</tr>
<tr>
<td><a href="http://www.girlscoutsosuw.org/cms/personify.aspx">http://www.girlscoutsosuw.org/cms/personify.aspx</a></td>
<td>1</td>
<td>1.4%</td>
</tr>
<tr>
<td><a href="http://www.girlscoutsosuw.org/CNS/adults/getinvolved.aspx">http://www.girlscoutsosuw.org/CNS/adults/getinvolved.aspx</a></td>
<td>10</td>
<td>13.7%</td>
</tr>
<tr>
<td><a href="http://www.girlscoutsosuw.org/CNS/camp/residents_camps.aspx">http://www.girlscoutsosuw.org/CNS/camp/residents_camps.aspx</a></td>
<td>2</td>
<td>2.7%</td>
</tr>
<tr>
<td><a href="http://www.girlscoutsosuw.org/CNS/events/patch_aspx">http://www.girlscoutsosuw.org/CNS/events/patch_aspx</a></td>
<td>16</td>
<td>21.9%</td>
</tr>
<tr>
<td><a href="http://www.girlscoutsosuw.org/CNS/events/prog">http://www.girlscoutsosuw.org/CNS/events/prog</a> anuide.aspx</td>
<td>1</td>
<td>1.4%</td>
</tr>
<tr>
<td><a href="http://www.girlscoutsosuw.org/storefront/">http://www.girlscoutsosuw.org/storefront/</a></td>
<td>4</td>
<td>5.5%</td>
</tr>
<tr>
<td><a href="http://www.youtube.com/user/GirlScoutsOSW">http://www.youtube.com/user/GirlScoutsOSW</a></td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

- **Overall interest**
- **Hot topic**
- **Low interest**
- **Hot topic**
TRACKING INDIVIDUAL SUPPORTERS CONTENT INTEREST – CREATE LISTS IN A CLICK

- Using the clicks report – identify interests

**Email Name:** Newsletter: Caribbean Island Travel

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<td>3</td>
<td>22.0%</td>
</tr>
<tr>
<td><a href="http://www.luxuryretreats.com/villas/africa/morocco/es/">http://www.luxuryretreats.com/villas/africa/morocco/es/</a></td>
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<td>22.0%</td>
</tr>
<tr>
<td><strong>Total Click-throughs</strong></td>
<td><strong>35</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Click to see who was interested in a topic - create lists

Save As List: Easily create lists of people with similar interests
## NONPROFIT ENGAGEMENT METRICS

### Tracking Supporter Engagement

<table>
<thead>
<tr>
<th>Email Name</th>
<th>Sent</th>
<th>Bounces</th>
<th>Spams</th>
<th>Opt-outs</th>
<th>Opens</th>
<th>Clicks</th>
<th>Forwards</th>
</tr>
</thead>
<tbody>
<tr>
<td>April Newsletter - New Donors - Monthly</td>
<td>86</td>
<td>36.0%</td>
<td>0</td>
<td>0</td>
<td>56.4%</td>
<td>41.9%</td>
<td>12.9%</td>
</tr>
</tbody>
</table>

Constant Contact’s Nonprofit Customer Averages (all message types)

- **Open Rate**: 20%
- **Click Through Rate**: 12.3%

### Email Newsletter Open Rate

**Median Organizational Newsletter Open Rate, n=485**

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Open Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Verticals</td>
<td>19%</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>20%</td>
</tr>
<tr>
<td>Association &amp; Membership</td>
<td>24%</td>
</tr>
<tr>
<td>Christian Ministries</td>
<td>21%</td>
</tr>
<tr>
<td>Disaster &amp; International Relief</td>
<td>18%</td>
</tr>
<tr>
<td>Disease &amp; Health Services</td>
<td>17%</td>
</tr>
<tr>
<td>Environment &amp; Wildlife</td>
<td>21%</td>
</tr>
<tr>
<td>Food Bank</td>
<td>17%</td>
</tr>
<tr>
<td>Hospital, Hospital Foundation &amp; Medical Research</td>
<td>17%</td>
</tr>
<tr>
<td>Higher Education</td>
<td>24%</td>
</tr>
<tr>
<td>Human &amp; Social Services</td>
<td>18%</td>
</tr>
<tr>
<td>Jewish</td>
<td>20%</td>
</tr>
<tr>
<td>National Nonprofit Mailer</td>
<td>17%</td>
</tr>
<tr>
<td>Public Affairs</td>
<td>16%</td>
</tr>
<tr>
<td>Public Broadcasting Stations</td>
<td>19%</td>
</tr>
<tr>
<td>Team Event</td>
<td>20%</td>
</tr>
<tr>
<td>Visitation, Performing Arts &amp; Libraries</td>
<td>27%</td>
</tr>
</tbody>
</table>

**Source**: 2011 Convio Online Marketing Nonprofit Benchmark Index Study

### Email Newsletter Click-Through Rate

**Median Organizational Newsletter Click-Through Rate, n=485**

<table>
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<tr>
<th>Vertical</th>
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</tr>
</thead>
<tbody>
<tr>
<td>All Verticals</td>
<td>3.06%</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>5.04%</td>
</tr>
<tr>
<td>Association &amp; Membership</td>
<td>4.31%</td>
</tr>
<tr>
<td>Christian Ministries</td>
<td>3.55%</td>
</tr>
<tr>
<td>Disaster &amp; International Relief</td>
<td>2.40%</td>
</tr>
<tr>
<td>Disease &amp; Health Services</td>
<td>3.33%</td>
</tr>
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<td>Environment &amp; Wildlife</td>
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<td>4.24%</td>
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<tr>
<td>Human &amp; Social Services</td>
<td>2.87%</td>
</tr>
<tr>
<td>Jewish</td>
<td>2.43%</td>
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<td>National Nonprofit Mailer</td>
<td>3.29%</td>
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<tr>
<td>Public Broadcasting Stations</td>
<td>1.87%</td>
</tr>
<tr>
<td>Team Event</td>
<td>3.05%</td>
</tr>
<tr>
<td>Visitation, Performing Arts &amp; Libraries</td>
<td>3.44%</td>
</tr>
</tbody>
</table>

**Source**: 2011 Convio Online Marketing Nonprofit Benchmark Index Study

Putting The Puzzle Pieces Together
CUSTOMER SPOTLIGHT: SUPPORTER FEEDBACK THROUGH EMAIL CLICKS

- Girl Scouts of Oregon and Southwest Washington
- Customer Since: July 2006
- Open Rate: 50%
- Click Rate: 15%

- Use Clicks to Send Content Their Supporters Want

- Michelle Clinch, Director of Communications:
  
  “One of the things that I love about email marketing is your wonderful reports. The click-through stats are really important to see what are people really connecting with and really interested in, and what are they not.

  A great example is, the parent and guardian - we never communicated with parents and guardians before Constant Contact - and so that allowed me to figure out what do these parents really want to hear from us that makes this message valuable? One of the things I was doing was an article of the month on a parenting topic. And boy, that’s a winner. The click-through stats allowed me to hone in on the things that are really important for the audience. And that makes message more read.”
CUSTOMER SPOTLIGHT: SUCCESS WITH SEGMENTING

- Camp Ronald McDonald for Good Times
- Open Rate: 38.6%
- Website: campronaldmcdonald.org

- Segmenting
  Segments their contacts into groups: volunteer, donor, and supporter lists.

- Tracking engagement
  Use reporting to see who the first person is to open an email

- Saving money and time
  Camp constituents love the nonprofits cost savings on printing and staffing

- Keeping supporters engaged

  “We have 600 volunteers in our database, but they’re not all active. It’s a great way to keep the information flowing out there.”

  David Garry, Volunteer Coordinator
HOW TO USE THE INFORMATION TO GET GREAT EMAIL MARKETING RESULTS

The Right Message, The Right Time, The Right People
DESIGN EMAILS FOR SPECIFIC SEGMENTS

Target Content to Your Segments

- Create lists/groups with similar interests
  - Supporters can add themselves through your sign up form
  - You can add people from your survey results
- Send different emails to different groups based on their interests

Tips to keep it simple:
- Create your general newsletter
- Use the copy feature

Existing Emails

- Re-creates your newsletter exactly and the copy is completely editable.
- Add in a block or two that is unique for each group or just re-prioritize the content
DESIGNING THE EMAIL

- Use each segment’s identified topics of interest to shape the content of your emails

- Use “Calls to Action” to measure how well you are meeting that segment’s interests

- Personalize – if you have more information than an email address, bring it in

“While 81% of organizations asked for more than email address at sign up, fully ¾ of these companies that collected this additional information didn’t use it to personalize or customize their email messages.”

- Creating Great Subscribers Experiences, Return Path 2008
• Schedule Regular Reviews

- Still responding to topics of interest?
- New topics of interest identified?
- Merge lists that are not growing
- Micro-segment large lists
  E.g.) Combine demographics with customer behaviors
  Search within any existing contact list
ADDED BENEFIT OF PERSONALIZED, TARGETED COMMUNICATION = EXTENDED REACH

The Right Message, The Right Time, The Right People
EXTEND YOUR REACH BEYOND EMAIL

Make Your Email Go Viral

• Benefits of Providing Engaging Content

  1. Increases awareness of your organization
  2. Grows your list

Make it Easy for Subscribers to Share the Information

  ▪ Place “Forward” links/buttons near the Top of the newsletter

  ▪ Place “Share” bar at the Top of the newsletter

✓ Allows your subscribers who are on social media to share the information with their social networks.

• Make It Easy For Friends to Sign Up

  ▪ Have a visible “Sign up” box in your newsletter
EXTEND YOUR REACH BEYOND EMAIL

Make your Newsletters Go Viral

Most nonprofits are using viral components in their emails.

- Table of Contents
- Education focused
- Encourages forwards
- Encourages Sign ups

Source: Return Path Nonprofit Study - Telling Stories, Building Relationships 2009
Event Communications: Ask registrants to share the event information. Jump start the word of mouth buzz around your event.

Once registered, attendees can spread the word about the event by sharing on Facebook or Twitter.

Note: Facebook users have on average 130 friends*

*Facebook FAQ's
CUSTOMER SPOTLIGHT: DUVALL HOME
CONSTANT CONTACT & BLACKBAUD

Customer since:
• Debra has been working with eTap since June 2011
• She’s worked with Constant Contact for 4 years
• Organization city, state: Glenwood, FL

Organization size:
• Emails – 700
• Donors – 2,239 donors in eTap

Website: http://duvallhome.org

Challenge:
• Account management, i.e. having all a comprehensive listing of all constituents’ info in one place

Tactics:
• First-ever appeal via email

Results:
• Using the two programs together allowed Duvall Home staff to manage their entire email list in one place
• Now, everything is at their fingertips – they can easily communicate with donors within “one click or two”
• Their very first e-appeal resulted in 125 bonus collection sheets and the donation of four sewing machines

Quote:
• “We recently merged our email databases, which was unbelievably simple to do, and the last appeal was tremendously successful!”
• Debra West, Chief Development Officer
WHAT’S ON YOUR MIND?
LOOKING FOR MORE OF THIS GREAT CONTENT?
VISIT: WWW.BLACKBAUD.COM/PUZZLE…

WEBINAR

A Communication Plan and Tactics to Engage Supporters Online
March 28, 2012, 2:00 p.m. ET
REGISTER TODAY! ➤

WEBINAR

2011 Online Giving Trends and 5 Tips You Can Implement Today
April 10, 2012, 2:00 p.m. ET
REGISTER TODAY! ➤

WEBINAR

The Anatomy of Engaging Email Campaigns
April 19, 2012, 3:00 p.m. ET
REGISTER TODAY! ➤

WEBINAR

Effective Marketing Tips and Tricks for Clicks
May 16, 2012, 2:00 p.m. ET
REGISTER TODAY! ➤

WEBINAR

Making the Most of Email Marketing
June 14, 2012, 3:00 p.m. ET
REGISTER TODAY! ➤
Special Offers from Constant Contact & eTapestry

- **Constant Contact**
  - Sign up for Constant Contact by 6/30/12 and get 50% off your first 3 months of service!
  - Call Joe at 888-606-7318

- **eTapestry**
  - Buy a new eTapestry Essential or Pro Package by 6/30/12 and get the first 3 months free or a FREE Dell Laptop computer!
  - Visit www.blackbaud.com/eTapestry/promotion
THANK YOU!

Alec Stern - Founder, Vice President Strategic Market Development Constant Contact

astern@constantcontact.com
linkedin.com/in/alecstern
@alecstern