# FUNDRAISERS: UP YOUR EMAIL GAME

A WHITE PAPER ON EMAIL USE IN NONPROFIT DEVELOPMENT AND ADVANCEMENT & BONUS GIVING DAY EMAIL SEQUENCE

Email is an inexpensive and powerful communication tool but it must be used well.

In this white paper, I lay out a comprehensive guide to every aspect of email that I have found to impact fundraising results.

As a bonus, you'll find an example of a Giving Day email sequence and schedule I have used in different organizations to great success. Feel free to copy!

# WHAT YOU'LL GET


HOW EFFECTIVE CAN EMAIL BE FOR FUNDRAISING? ... 3

AS WITH EVERYTHING, YOU MUST DO EMAIL WELL FOR OPTIMAL RESULTS ... 7

WHAT TYPES OF EMAIL DO YOU SEND? ... 7

- MARKETING EMAILS ... 7
- TRANSACTIONAL EMAILS ... 8
- WHY IS THIS IMPORTANT? ... 8

WAYS TO SEND EMAIL ... 9

- ONE-OFF EMAILS THROUGH OUTLOOK OR ANOTHER EMAIL CLIENT ... 9
  - BEST PRACTICE: Stay Productive ... 9
  - BEST PRACTICE: Keep Emails Readable ... 10
  - BEST PRACTICE: Track the Effectiveness of your Fundraising Emails in Outlook ... 10
  - BEST PRACTICE: Automation ... 10
  - BEST PRACTICE: Don't Forget your Signature ... 11
- MASS EMAILS THROUGH OUTLOOK ... 11
- THROUGH AN EMAIL SERVICE PROVIDER ... 11
  - Sender Reputation ... 12
  - Measuring Fundraising Effectiveness ... 12
  - BEST PRACTICE: Check your Email for Deliverability ... 12
  - BEST PRACTICE: Domain Validation ... 13
  - BEST PRACTICE: Get Your Own Sender IP ... 13
  - BEST PRACTICE: Trim Down your Lists by Engagement ... 14
  - BEST PRACTICE: Drip Campaigns and other Automation ... 14
  - BEST PRACTICE: Design Email and Content for Conversion ... 14
  - BEST PRACTICE:  Allow Unsubscribe to Separate Email Lists ... 15

SUMMARY ... 15

BONUS: GIVING DAY EMAIL SEQUENCE ... 16

- GIVING DAY EMAIL SCHEDULE ... 16
- ADDITIONAL ... 18

# OCTOBER 2022 UPDATE

Most of what this guide shared in 2019 is still relevant, the types of emails, different methods to send email available to the rank-and-file gift officer, and general value of email remain the same.

Two areas have seen significant changes and I believe required this update: the requirements around deliverability have become more stringent and the opportunities of email automation to provide an extraordinary donor experience are greater than ever.

## UPDATE 1: EMAIL DELIVERABILITY IS A GROWING ISSUE FOR NONPROFITS

Email service providers are enforcing strict quality standards to cut down on spam and other unwanted messages. Unfortunately, many of the communications we send are getting filtered in some way. This results in fewer people seeing our messages, fewer relationships started, and fewer gifts received.

The changes we've seen since this guide was published in 2019:

- Domain validation is no longer optional (see section below on DKIM/SPF records)
- List hygiene is also almost a requirement. Make sure you're not emailing invalid emails and that you're trimming down your lists by engagement (see section below). Bouncer or Email Hippo can help you with the invalid emails.
- If you're sending campaigns that are likely to be classified as spam (like solicitation campaigns, or event invites to unengaged constituents) use different domains for these campaigns. Warm them up before you use them.
- You can check the effectiveness of the above strategies with a tool like GlockApps, which will tell you if your emails are landing in the main inbox, promotional tabs, or spam folders
- This one was in the 2019 version but is as valid as ever. All text emails look less spammy. Nonprofits are still sending too many communications that look like newsletter templates.
- Establish a process to run your campaigns through a tool like mail-tester to check for spam words.
- Another email business process you should establish is to regularly monitor your domain sender reputation with a tool like Talos.

There are many actions to take and they must happen at different intervals. If you have an internal collection of operating procedures (as you should), add an email health checklist and update it every year as best practices evolve.

Create a living document of email health actions you take every 3-6-12 months. This stuff changes all the time.

## UPDATE 2: PROVIDE AN EXTRAORDINARY DONOR EXPERIENCE THROUGH AUTOMATION

In the last 2-3 years an area of automation called no-code has exploded. There are many tools and there is a high possibility that you are able to connect your existing tech infrastructure (CRM, giving form, office suite) with them.

These tools like Zapier, Integromat, and Microsoft Power Automate, allow you to design simple or complex flows without needing to know any coding. You'll still need how to think logically, but the entry barrier and cost is now dramatically lower.

You're now able to provide human, warm interactions consistently to your donors without losing the human touch.

As an example, think of an action or sequence of actions that you'd like to happen every time a trigger happened:

- Basic: Every time a gift is received, send a thank you email
- Medium: Every time a gift is received, check to see if we have an email on file. If we do, compose a draft and put it into the drafts folder of a gift officer so they can review it before sending. If we do not, merge a Word document and place the merged file into a Google Drive folder where someone in the office can print it and mail it every morning.
- Advanced: All of the above, plus add segmentation by type or gift amount so that gift officers are notified when one of their prospects makes a gift and gifts over a certain amount are added to a spreadsheet to get a discovery phone call.

Here are some automation ideas that we hope will get you excited:

- "Thank you for sticking with us" donor downgrade
- Consecutive year thank you
- 5 - 10 - 15 milestone gift thank you
- Pledge completion thank you
- Gift increase thank you
- Gift increase referral to major gifts officer
- "Your donor made a gift" notice to gift officer
- Gift anniversary solicitation
- 11-months out how are we doing email
- Post-donation survey and thank you
- First-time donor post-donations survey and thank you
- Donor welcome email series

## UPDATE 3: SET UP YOUR AUTOMATIONS WITH HELP FROM THE DONOR PARTICIPATION PROJECT

The Donor Participation Project is a community of 2,000+ fundraisers who get together every month to learn from each other how to increase donor participation in nonprofits. We believe that setting up a donor welcome series is the top, most cost-effective way to improve the donor experience and retain more donors.

You can learn more about this service at:

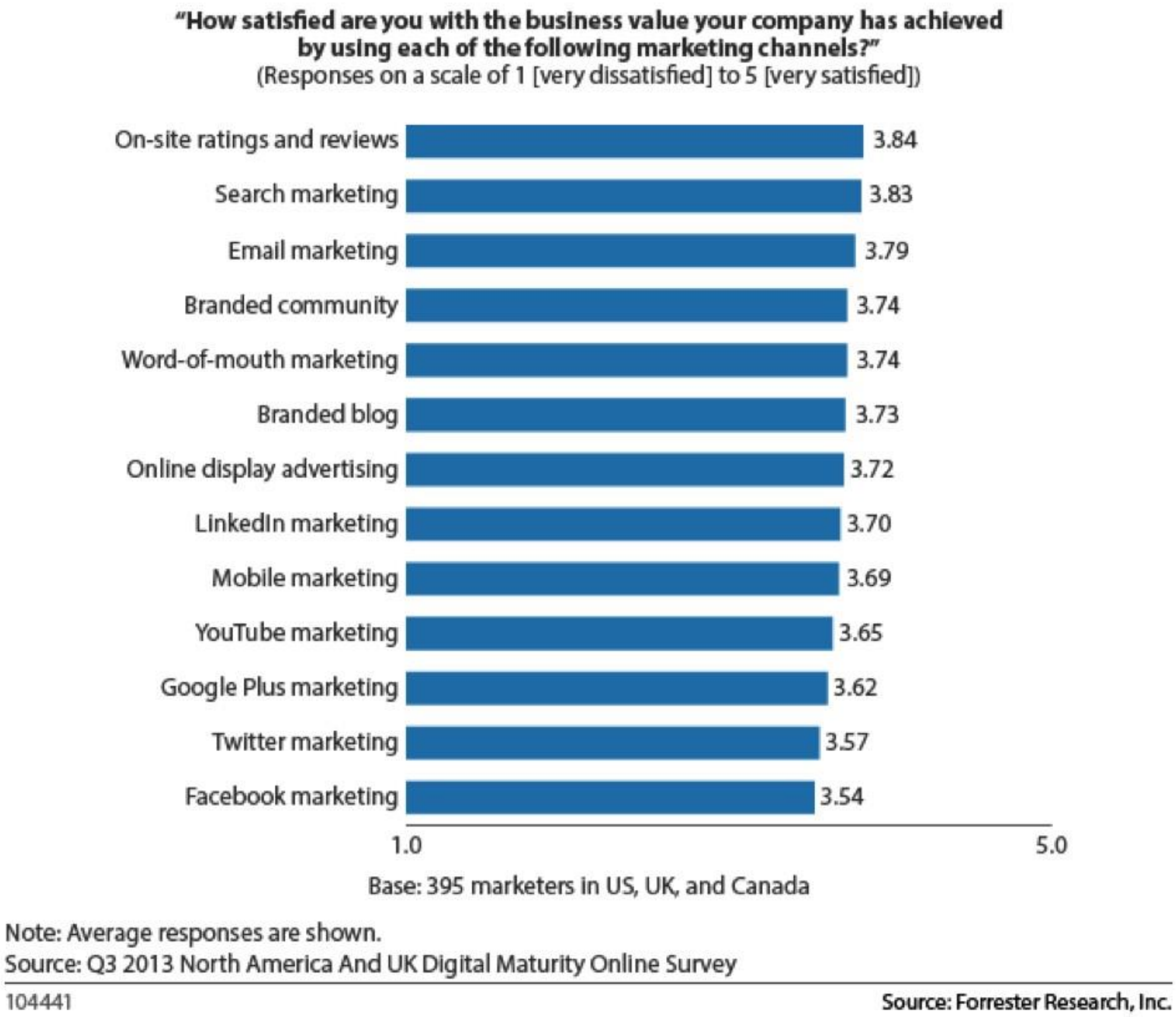
joindpp.org/fix-donor-retention

Reach out to us if you'd like to get this in place.

# HOW EFFECTIVE CAN EMAIL BE FOR FUNDRAISING?

As a tool for communication, email is one of the most effective and efficient tools at your disposal. No matter what type of fundraising you practice (annual, major, planned, institutional), you probably spend most of your day sending and receiving emails when you're not out of the office visiting donors.

In 2013, Forrester asked 395 marketers and executives "How satisfied are you with the business value your company has achieved by using each of the following marketing channels?" Email came in at the top of the list when it comes to delivering business value.


"How satisfied are you with the business value your company has achieved by using each of the following marketing channels?"
(Responses on a scale of 1 [very dissatisfied] to 5 [very satisfied])
On-site ratings and reviews 3.84
Search marketing 3.83
Email marketing 3.79
Branded community 3.74
Word-of-mouth marketing 3.74
Branded blog 3.73
Online display advertising 3.72
LinkedIn marketing 3.70
Mobile marketing 3.69
YouTube marketing 3.65
Google Plus marketing 3.62
Twitter marketing 3.57
Facebook marketing 3.54
1.0
5.0
Base: 395 marketers in US, UK, and Canada
Note: Average responses are shown.
Source: Q3 2013 North America And UK Digital Maturity Online Survey
104441
Source: Forrester Research, Inc.

## As With Everything, You Must Do Email Well for Optimal Results

Oftentimes, we don't realize that paper (invented around 100 B.C.) has been in use for thousands of years and many of its best practices have been internalized by now. As a technology, we have paper down pat.

Email on the other hand, was only invented in 1972 and became popular in the 1990s. So, it has been around for less than 30 years of which only the last 20 have seen widespread use in fundraising.

### Good or Bad Idea?

*"Let's switch over our direct mail appeals to email so we can save costs."*

If you have been tempted to try this, don't.

Yes, it will save you costs but at the expense of vastly diminished results.

Email is an additional tool in your belt but you should not expect it to substitute your direct mail program.

## What Types of Email do you Send?

The first step on your road to email mastery is to understand the difference between Marketing and Transactional email.

### Marketing Emails

Any email that is sent for commercial purposes.

For example, this might include a solicitation email that is designed to encourage a donor to give, make a pledge, inquire about more information, download content, or learn about a promotion or a temporary offer.

Here are some types of emails that generally fall into the marketing category:

- email newsletters
- promotions
- deals
- offers
- sales emails or solicitation emails

## Transactional Emails

Transactional emails differ in that they are emails generated as a response to a particular action done by the donor.

They may have made a donation, added a friend, asked for more information, updated information on their account, requested reminders or made other types of direct actions that then triggered a follow-up email that is connected to that action.

Here are some emails that tend to fall into the transactional category:

- account changes or updates
- thank you emails
- donation receipts or invoices
- tracking notifications
- event confirmations
- pledge reminders
- changes to rules, regulations or policies that impact the donor
- cart abandonment follow-up emails
- support requests or inquiries

### True or False?

*"Every mass email we send needs to have an unsubscribe link or else we'll be fined because of the CAN-SPAM act!"*

False.

Transactional email is exempt from most provisions of the CAN-SPAM act, which is the one that requires you to "tell recipients how to opt out of receiving future email from you" in your emails.

Quoting the Federal Trade Commission:

"If the message contains only commercial content, its primary purpose is commercial and it must comply with the requirements of CAN-SPAM. If it contains only transactional or relationship content, its primary purpose is transactional or relationship. In that case, it may not contain false or misleading routing information, but is otherwise exempt from most provisions of the CAN-SPAM Act."

## Why Is This Important?

The type of email you're sending impacts a lot of decisions about *how* you should send it.

From the lists above, you'll notice that many of the emails typically sent in fundraising are Transactional. Transactional emails are not required to have an unsubscribe link among other requirements that Marketing emails have (see "True or False?" box).

This is separate from the decision about whether you *should* have an unsubscribe link on certain emails, for customer friendliness or to avoid spam filters (more on that later).

Some advanced email service providers (ESPs) will allow you to send transactional and marketing emails separately.

This is good because someone may want to unsubscribe from your email solicitations but it would be strange for them not to get an email confirmation for an information request or an online gift!

### WHAT'S MISSING?

If you fundraise for a healthcare organization that needs to follow HIPAA, there are additional limitations on the type of emails you can send to prospective donors/grateful patients and the type of data you are allowed to use.

Here is an advisory, although consultation with your institution is essential.

# WAYS TO SEND EMAIL

You have three ways to send an email.

Each of them has its own strengths and weakness. Like a Swiss-army knife, you need to use the right tool for the right type of problem.

## ONE-OFF EMAILS THROUGH OUTLOOK OR ANOTHER EMAIL CLIENT

This is your plain old email that you sit down, write, and send to an individual person.

The assumption is that this type of email is not automated and thus has a more personal feel to it.

Many of these emails will be Transactional. They typically will not have a lot of fancy formatting.

**BEST PRACTICE: Stay Productive**

Productivity tips and hacks for Outlook are all over the Internet. The ones I apply to every machine I work on are:

Threaded Conversations

Snooze your Emails

Liberally use the Archive folder (Outlook 2016 and later) and set up default search to Current Mailbox so you can find your stuff.

**October 2022 update:** Since we published this in 2019, Google has made most of these functions available by default. If you work in a Google Workspace environment, you're in luck!

### BEST PRACTICE: Keep Emails Readable

Especially if communicating with a senior demographic, it will help you fundraise more effectively if you keep your emails readable.

This includes staying within certain parameters for your subject line length, word count, question count, and reading level.

Fortunately, you don't need to keep all of this in mind. I'm in love with this tool, which does all the work for you: Boomerang Respondable.

You should also pay attention to the closing/sendoff you finish your email with. According to this study, the one that will guarantee the most responses is "Thanks in advance."

### BEST PRACTICE: Track the Effectiveness of your Fundraising Emails in Outlook

There are many tools that let you know a lot about how your recipients engage with your personal emails.

You can know who opens your emails, for how long they read your email, and who clicks on the links that you include in emails.

Use them. Try different things. Improve the way you write emails to make yourself a better fundraiser.

BananaTag is one of the multiple services the lets you do this and is compatible with Outlook.

### BEST PRACTICE: Automation

The most advanced tools let you set up automatic behaviors based on rules. You can get notifications when one of your prospects reads your email, schedule automated follow-ups if they do not reply, and many other combinations.

At the major gift level, many of these ideas will not be recommendable but they can be very effective for mid-level donors as a way to increase your reach while keeping a certain level of personalization (since you are still personally reading and responding to all emails).

SalesHandy is a good example of this level of sophistication.

### BEST PRACTICE: Don't Forget your Signature

The signature (the part where you include your name and contact information) is often an afterthought.

Some clever people have realized there is a lot you can do with it to further increase email effectiveness as a fundraising tool.

Templafy and Black Pearl Mail seem to be the major players in this area.

## Mass emails through Outlook

There are times when you need to quickly send a semi-personal email to a fairly large group of people.

For example, you may need to send a quick event confirmation notice to a group of donors. Or you may want to share an article with a group of alumni. Or you may want to send a quick thank you to donors who supported a particular crowdfunding initiative.

There are two ways to do this:

The first and preferable way, is to do a mail merge from Microsoft Word into Outlook. This allows you to have a level of personalization in each email.

Alternatively, you can add the recipients' emails in the BCC field. There will be a limit to how many addresses you can add in your BCC field. The emails won't be personalized and it is possible that spam filters view this as a negative factor (you can always test the email using a tool like www.mailtester.com).

## Through an Email Service Provider

Email Service Providers (ESPs) are typically used to send bulk emails through a third party. In other words, they send out emails in your name.

Brand names for different ESPs are Constant Contact, MailChimp, Sendgrid, or Elastic Email.

This method of sending can be used for both Marketing and Transactional emails. The main things you have to look out for when using this method is your **sender reputation** (so you avoid being put in spam boxes) and **measuring fundraising effectiveness**.

### Sender Reputation

When a recipient gets an email from you, their Internet Service Provider (ISP) looks up your sender score, which is like a credit score but for email senders. If it is low, your email will be more likely to end up in their spam folder.

The best practices below will help avoid this. Some of them you may not be able to do anything about on your own but you can ***use them to communicate with your IT department in a constructive manner***.

### Measuring Fundraising Effectiveness

One of the beauties of digital communication is that it allows you to track exactly how many of the people that received your email went on to make a gift.

It may be a bit of a pain to set up the system to measure this, but ***if you don't you are basically shooting in the dark***.

Open, click-through, and unsubscribe rates are interesting metrics but the main ones you need to monitor are conversions (number of gifts generated from your email) and dollars raised from the email.

You can do this multiple ways (check with your IT department). Some of them involve you including a tracking script on your "thank you" page or gift confirmation page, which is the page that donors see after they complete their gift on your website.

Another method is to pass on an appeal code into the URL of the link people click on that identifies that specific email. For example: www.yourorg.org/donate/?appeal_code=1234

### BEST PRACTICE: Check your Email for Deliverability

There are multiple free online services that will analyze your email and highlight any problems that may make them less likely to be delivered. They typically run your email through a spam filter and let you know the results and provide a lot of technical detail to improve the likelihood that your email will be delivered.

One of the nicer looking ones is [Mail Tester](), but you should check out several of them since they don't always agree in the results.

## BEST PRACTICE: Domain Validation

You (or your IT department) will need to confirm that you are actually the owner of the domain name you send your emails from.

1. SPF

SPF stands for "Sender Policy Framework". An SPF record is in place to identify which mail servers are authorized to send mail for a given domain. It is used to prevent spammers from sending mail with fraudulent From addresses in that domain.

2. DKIM

DKIM stands for "DomainKeys Identified Mail". They allow receiving servers to confirm that mail coming from a domain is authorized by the domain's administrators.

3. DMARC

Domain-based Message Authentication, Reporting & Conformance is an email authentication protocol that is built on top of SPF and DKIM protocols. SPF and DKIM are prerequisites of DMARC and must be in place before setting up a DMARC policy. A DMARC policy allows a sender to indicate that their emails are signed by SPF and DKIM and tells a receiver what to do if neither of those authentication methods passes – such as junk or bounce the email. DMARC removes the guesswork from the receiver's handling of these failed emails, limiting or eliminating the user's exposure to potentially fraudulent and harmful emails.

## BEST PRACTICE: Get Your Own Sender IP

The lower tiers of service in most ESPs will send your email from a shared Internet Protocol (IP) address with hundreds or thousands of other senders.

Therefore, you will not be able to fully control your sender reputation. The bad behavior of other users could make your emails less likely to reach their recipients.

For a fee, you can have your own dedicated IP address so that your emails have an even higher chance of being delivered.

## BEST PRACTICE: Trim Down your Lists by Engagement

We typically want to email our list in segments defined by giving (i.e. current-year donors, LYBUNTS, SYBUNTS, acquisition).

A lot of those persons never open our emails, even though we send them solicitations again and again.

If ISPs see that a lot of your recipients are not engaging with your email, they will lower your sender score which makes it more likely for your emails to end up in spam folders.

Conversely, if you have high open rates your reputation will improve and more people will see your emails. This is step one for them to make a gift!

So, **consider excluding from your lists those who have not opened any of your last 10 emails**.

## BEST PRACTICE: Drip Campaigns and other Automation

Most ESPs have multiple automation options that allow you to set up sequences of emails triggered by different user behaviors. For example, resend after 5 days to those who have not opened the original email; or send a different email after 2 days to those who opened the email but did not click on any of its links.

You might also set up sequences that welcome people to your organization after their first gift. This way, you can go beyond the perfunctory thank you email confirmation.

## BEST PRACTICE: Design Email and Content for Conversion

You might be tempted to think that a good email is one that is very nicely designed, or has a lot of interesting content and links, or has lots of graphics.

I don't know the answer to this. You will have to decide what your goal is (for ex. starting a conversation, eliciting an online gift, or getting a person to sign up for an event), make sure you have a way to measure the desired behavior and link it to our email, and then try out a few different ways.

That being said, there are lots of ideas, tips, and tricks online to make your emails more effective. These elements will make up the anatomy of a great email:

- A From address that the donor knows. A person is typically better than an institutionalsounding address. Somebody they know is better than somebody they do not.

- Personalization. In general, the more personalized the better. If you are sending out a renewal reminder, include the amount, date, and designation of the last gift. If you are asking for address updates, include the current address on file.
- Include a visible call to action to get them to perform the desired action. The call to action must be prominently displayed, sometimes even multiple times. Buttons tend to be more effective than text links.
- Include contact information. Add multiple ways for donors to get in touch with you in case they have questions: phone, email, social media, etc.

### BEST PRACTICE: Allow Unsubscribe to Separate Email Lists

A common error is to only offer the option to unsubscribe from all email communications.

Imagine that someone received an appeal and they do not want to receive any more but they're OK receiving future informational emails (which, let's face it, may contain development content but maybe not a direct ask).

When you are evaluating ESPs, make sure the one you choose allows recipients to "Manage their Subscriptions" to choose individual lists vs. simply unsubscribing from all email.

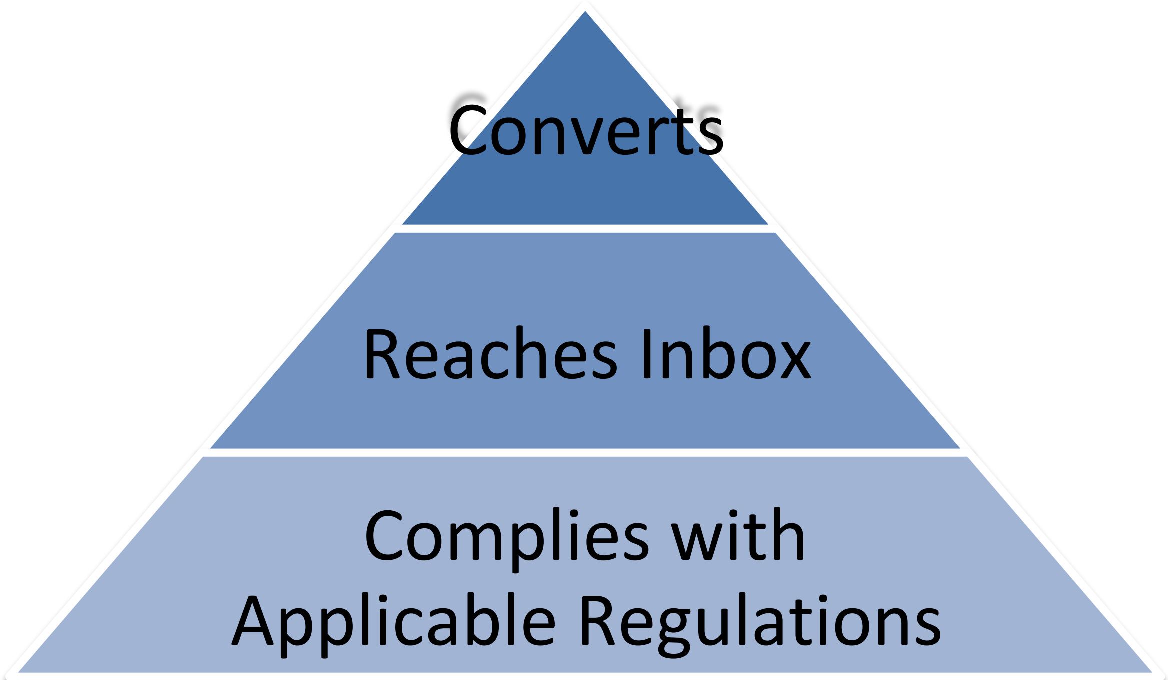
## SUMMARY

In a nutshell, there are three sequential goals that you want for your emails:

1. They must be compliant with relevant regulations (CAN-SPAM in the US, HIPAA in healthcare, or CASL if you email to Canada).

2. They must avoid the spam folder so that you have a chance of actually being seen by your constituents.

3. They must be effective for the intended purpose, be it getting people to sign up for an event, set up a meeting with you, or make an online gift. This is typically called "conversion."




## BONUS: Giving Day Email Sequence

When all the above elements are in place, the following sequence of emails will be effective and low-cost way to create excitement and revenue for your organization's Giving Day.

To execute this Giving Day successfully you will need:

- Email infrastructure set up according to this white paper.
- A functional online giving form. The simpler the better.
- A web site that you can edit throughout the day to keep a running tally of gifts.
- Optional: Identifying and securing matching and lead gifts will help you start with momentum and keep the excitement going throughout the day.

### Giving Day Email Schedule

One of the fundamental differences between email and direct mail is that it takes many more emails to get someone to perform a desired action.

The key here is to not become annoying with an excessively pushy message so they don't unsubscribe. You should aim to have every email you send provide some form of value, be it informational, emotional, or social.

A Giving Day provides a good venue to inform and request support in a non-threatening way. After all, it is only one day and when it's over, it's over.

- Email 1
  **Date**: One month out
  **Subject**: [YOUR ORG] Giving Day
  **Content**: Mark your calendar. [YOUR ORG] is coming together to make a difference on XX/XX/XXXX. Include link to save the date to people's calendars using a tool like this one.
- Email 2
  **Date**: Two weeks out
  **Subject**: Two weeks until [YOUR ORG] Giving Day
  **Content**: Can't wait for the [YOUR ORG] Giving Day. You don't have to! Provide link to make advance gift to Giving Day. Now that you're able to track gifts back to the email that generated them, this won't be a problem at all! Right?
- Email 3
  **Date**: Three days out
  **Subject**: [YOUR ORG] Giving Day – Have You Heard?
  **Content**: In the voice of a volunteer, or even a mascot if applicable. Announce challenges, request early support, direct donors to website with leaderboard and info on challenges. 
- Email 4
  **Date**: Day of @ 10.30am
  **Subject**: Last Day to Make [YOUR ORG] History!
  **Content**: Focus on impact. The [YOUR ORG] Giving Day is a day for everyone who loves [YOUR ORG] to come together and maximize our impact. Your gift today could… Emphasize challenges (if they are for different areas/programs of your organization). Include infographics on number of donors, gifts, and dollars raised already. Mention leaderboard and progress toward challenges.
- Email 5
  **Date**: Day of @ 8.30pm
  **Subject**: We're Almost There! Help us Reach $xxx,xxx for [YOUR ORG] Giving Day!
  **Content**: Only 3 hours left to meet our goal. We need your help!
- Email 6
  **Date**: Day after
  **Subject**: Thank You! You made the [YOUR ORG] Giving Day a Success!
  **Content**: Thank you message. Reflect impact.

## Additional

You will need a page on your website where you can list the challenges, make the case for support, insert personal stories (perhaps of the challenge donors), and even an honor roll. You'll have to update this throughout the day.

For bonus points, you can focus a volunteer calling effort on the Giving Day and develop a social media plan with hourly challenges and prizes.

## Questions?

As always, this is a work-in-progress and I welcome all your comments, questions, and observations. Feel free to reach out at any time at info@marktlab.com or on LinkedIn.