

# 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!

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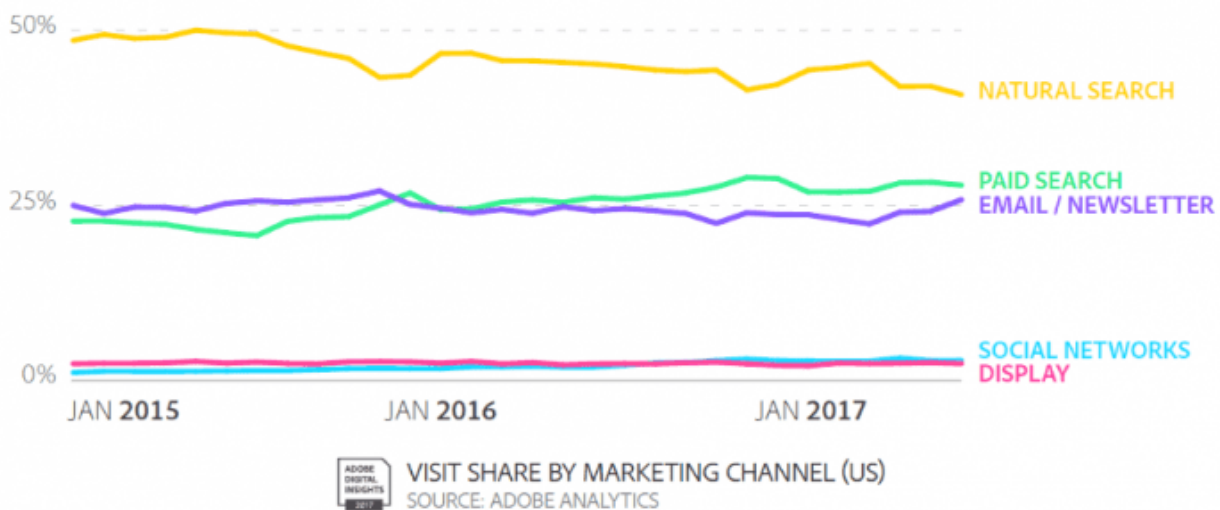
How Effective can Email Be for Fundraising? .....	3
As With Everything, You Must Do Email Well for Optimal Results.....	4
What Types of Email do you Send? .....	4
Marketing Emails.....	4
Transactional Emails.....	4
Why Is This Important?.....	5
Ways to Send Email .....	6
One-off Emails Through Outlook or Another Email Client.....	6
BEST PRACTICE: Answer Promptly!.....	6
BEST PRACTICE: Stay Productive .....	6
BEST PRACTICE: Keep Emails Readable .....	6
BEST PRACTICE: Track the Effectiveness of your Fundraising Emails in Outlook.....	7
BEST PRACTICE: Automation .....	7
BEST PRACTICE: Don't Forget your Signature .....	7
BEST PRACTICE: Have Strategies to Act on What You Learn!.....	8
Mass emails through Outlook.....	9
Send Email Through an Email Service Provider .....	9
Sender Reputation.....	9
Measuring Fundraising Effectiveness .....	10
BEST PRACTICE: Check your Email for Deliverability .....	10
BEST PRACTICE: Domain Validation .....	10
BEST PRACTICE: Get Your Own Sender IP .....	11
BEST PRACTICE: Trim Down your Lists by Engagement.....	11
BEST PRACTICE: Drip Campaigns and other Automation .....	12
BEST PRACTICE: Design Email and Content for Conversion .....	12
BEST PRACTICE: Who is the Email From? Who should be the Solicitor?.....	13
BEST PRACTICE: Allow Unsubscribe to Separate Email Lists.....	14
Summary.....	14
BONUS: Giving Day Email Sequence .....	15
Giving Day Email Schedule .....	15
Additional.....	16

## 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 as third best when it comes to delivering business value (after "On-site ratings and reviews" and "Search marketing").

In 2017, a survey of 250 top retailers by [Adobe Digital Insights](#) identified email as the third highest source of visits by marketing channel.



## 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
- 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

## 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 both in the law and in donor's minds, these are two separate types of emails. They usually want to receive transactional emails but not solicitation emails.

## 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."

## 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: Answer Promptly!**

No tech required. There is a ton of research about this. Prompt replies (within 24 hours max) build trust. Trust is critical in all relationships, but especially in fundraising.

### **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.

### **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 that 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.

## **BEST PRACTICE: Have Strategies to Act on What You Learn!**

All of the above will be worthless if you do not act on what you learn through these additional sources of information.

Is a certain donor or donor group more likely to open emails about the arts or about genetic research? Make a note of it and tailor future communications to them based on these behavioral insights.

Example Strategies to use Email Data:

- If you are working on this on your own, you can choose a communication you'd like to send to a medium-sized group of 250 constituents. Then, send in batches of 15-20 emails and observe the open and click-through rates.

Make changes in the subject line and content and see if you can improve your metrics.

This is not the most scientific method, but will be more helpful than just blasting the message out to everybody.

- If you have more resources at your disposal and are working with larger groups of recipients, you can start with A/B testing of subject lines.

You can also test interest by thematic areas and integrate the results back into your CRM database. Does constituent XYZ open every email about the arts but none about biomedical Research? These results should be fed back into the individual's profile and could be helpful in modeling and prospect qualification efforts.



## 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.mail-tester.com](http://www.mail-tester.com)).

## SEND EMAIL 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](http://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

DMARC stands for Domain-based Message Authentication, Reporting & Conformance. This 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.

Ideas that you could implement in this area:

- **New Donor Email Sequence.** Set up sequences that welcome people to your organization after their first gift. So, in addition to their initial thank you email/letter they get 2/3 additional emails introducing them to your organization. Then, if you see they have opened and clicked on all the emails consider them for additional engagement/solicitation.
- **Solicitation Reminder Sequence.** After you send a solicitation, set up a reminder to go out 2 days later if they opened it but did not make a gift.
- **Engaged Non-Donors Acquisition Email Sequence.** You have a list of constituents who are engaged in some capacity with your org but have not made a gift. Think about the type of information these individuals may want to know about you that **is not** included in your usual solicitations. For example: many of them won't realize that you are a nonprofit, that you rely on donations to do your world-changing work, or how your finances work. Maybe they have questions about how their gift makes a difference or want to see that others are giving.

## **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 your 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 institutional-sounding address. Somebody they know is better than somebody they do not.
- The Subject line is the next crucial piece of text that will determine whether your audience opens their email or not. Most of your readers will open the email on mobile devices that

truncate the subject line. Place the most important or enticing information at the beginning of the subject line. Consider these alternatives:

Don't Forget To Respond With Your RSVP For Friday!

Vs.

You're Invited! RSVP Now for Friday

Military personnel even start their subject lines with [keywords that describe the type of action required from the recipient](#). I've found this to be highly efficient in one-to-one communications.

- 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: Who is the Email From? Who should be the Solicitor?**

A crucial factor in getting your email opened is to carefully consider who the sender is.

Remember, mass emails will generally allow you to choose who the email is coming From as well as the Reply-to address, which is where the mail gets sent when the recipient hits on the Reply button.

General rules of solicitation are applicable here: it is preferable to have someone the donor knows and respects over someone they do not; it is preferable to have it come from a human vs. a general mailbox.

Ask your IT department about this. They will usually be able to set a temporary inbox (or an "alias" on your inbox) under a volunteer's name so it looks like it comes from them but their personal address does not get swamped with mass mailing responses. I.e. <John and Marie Doe> "JohnandMarieDoe@yourorganization.org".

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

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

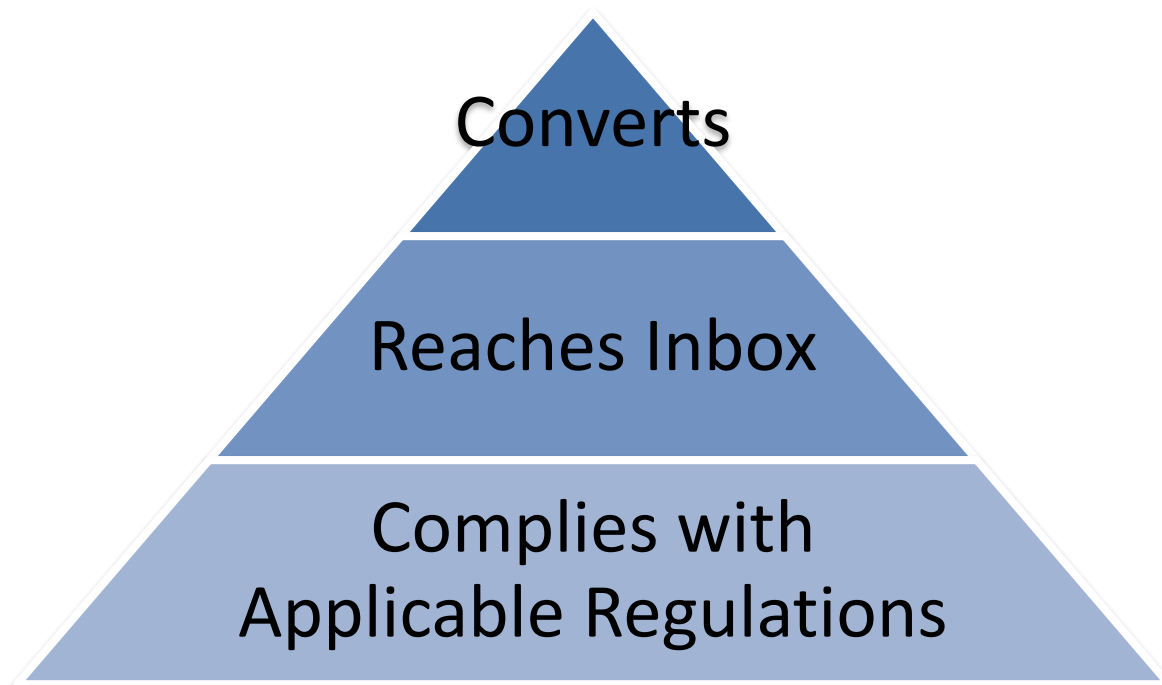
Imagine that someone received an appeal and they do not want to receive any more but they're OK receiving future informational emails (which, let's face it, may contain development content but maybe not a direct ask).

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 an 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](mailto:info@marktlab.com) or on [LinkedIn](#).