Marketing Automation 101 for Nonprofits

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Introduction

Did you know 76% of customers expect companies to understand their needs and expectations, and 59% say personalized engagement based on past interactions is very important? Customer expectations are higher than ever, and marketers are trying to fulfill those expectations.

But what does this have that to do with a nonprofit? Well, constituents engage with a nonprofit the same way they do with a company. They explore your website, research your mission, and sign up for newsletters, but instead of buying a product, the result will be to donate, volunteer, or become a member. Personalized messaging throughout this process is extremely important.

Marketing automation allows nonprofits to delight constituents.

What Is Marketing Automation?

This Is What Marketing Automation Is

According to Salesforce, **"Marketing automation is a software platform that helps you automate your marketing and sales engagement to generate more leads, close more deals, and accurately measure marketing success."**

At its best, this could look something like Netflix: your prospects can get a steady flow of content tailored uniquely to them based on past behavior to keep them subscribed (or to keep them donating, volunteering, and advocating).

At its worst, marketing automation is an expensive Band-Aid that had great promise but ends up being underutilized, or worse yet, automatically fires off communications to the wrong audiences.

Where Do Nonprofits Fit in?

There's a sweet spot where nonprofits can operate happily and effectively. This is where marketing automation, along with a well-defined communication strategy, helps nurture relationships to increase your donor base and program impact organically through content. By removing time-consuming manual work with automation, this leaves room to strengthen relationships through unique personalized messaging.

The ability to have a bird's-eye view of how constituents engage with you allows you to create the personalized content that they're looking for.

Marketing automation typically includes these features that apply to nonprofits

CTAs: A call-to-action or CTA is a text link, button, image, or some type of web link that encourages a website visitor to visit a landing page and become a lead. Some examples of CTAs could be “Donate now”, “Join today”, or “Subscribe”.

Forms: Where you collect a contact’s information. Typically nonprofit forms should at a minimum include first name, last name, email address, and state.

Landing Pages: A landing page is a website page containing a form that is used for gathering interested visitors into your fold. This page revolves around an offer, such as an event registration, ebook, or a webinar, and serves to capture visitor information in exchange for the offer.

Social Media Publishing: A centralized place to publish social media posts in bulk across multiple platforms (most commonly Twitter, Facebook, LinkedIn and Instagram).

SEO/Keyword Tools: Search engine optimization (SEO) is the practice of enhancing where a webpage appears in search results. Keywords are topics that web pages get indexed for in search results by search engines like Google. Nonprofits can consider key aspects of their mission or programs as potential keywords.

Website Visitor Tracking: Keep tabs on how many (and which) people are visiting the different pages of your website. Analyzing these numbers will key you into which types of communication are most successful, and which constituents are most engaged.

Lead Scoring: Lead scoring lets you assign a value to potential donors and constituents based on the actions they take. Once leads reach a previously determined threshold or tipping point, they are qualified to be handed over for personal follow-up.

Drip Campaigns: Little by little, drip campaigns provide potential constituents, participants, or donors with information that keeps them informed and engaged. Drip campaigns include a series of emails that help you stay top-of-mind to your constituents.

Persona Profiling: Fundraisers, volunteers, advocates, and donors all have different network sizes, skills, and motivating factors. Identifying profiles in your CRM will help you start building segments that you can send different types of information to.

Content: Content such as blog posts allow you to establish your organization's voice and add a personal touch to your mass communication, but most importantly they create a central place where you can house thought leadership content that can be used over and over again for email campaigns in the future.

Who Is It for?

Is It for You?

You're best positioned for marketing automation if you fit these minimum criteria:

- *$2MM revenue*
- *5000+ contacts*
- *1-2 dedicated marketing staff who love analytics, constant tweaking, strategizing, and producing content*

If you don't fit this criteria, marketing automation may be cost prohibitive, and without the dedicated staff, it's difficult to take full advantage of it.

But most importantly, you'll know it's time to consider marketing automation if you start to feel pain or limitations with your current communication solutions. You most likely reached the point that you maxed the potential of your bundle of free and/or discounted software, and results start to plateau.

The pain you felt stretching the limits of these solutions will help you be smart with your new marketing automation strategy.

Three Tiers to Consider

There is huge variety between marketing automation solutions, from mass email to a full communication platform. Here’s how we think about it.

Low-Medium: Mass Email and Basic Integration

Many nonprofits start with low-cost mass email systems that typically provide limited integration with Salesforce, such as MailChimp, Constant Contact, Soapbox Mailer, or Emma. Predictive Response and Campaign Monitor are examples that are more integrated and sophisticated.

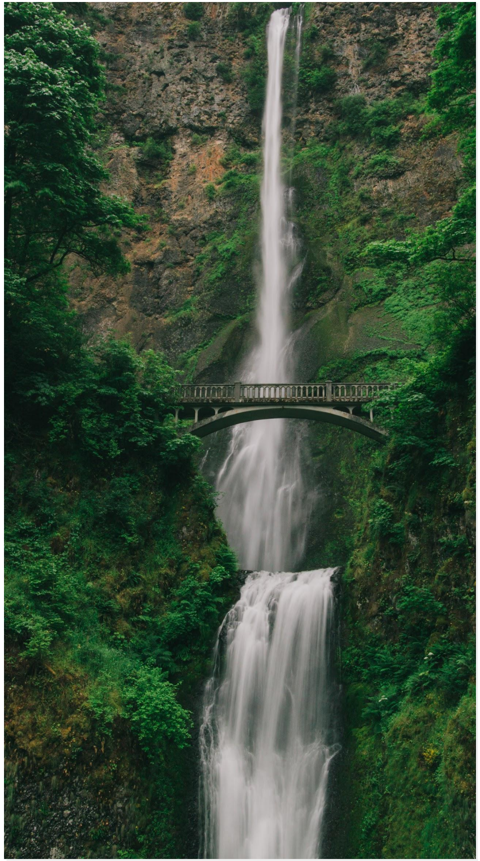
What they include:

- **Easy to use WYSIWYG email editors**
- **Scheduled and drip emails**
- **Lead scoring:** Set scores for actions that automatically show in the lead or contact object.
- Depending on the system, and whether or not it's integrated with Salesforce, you may be able to send emails to Salesforce lists or **campaign members**.
- **Campaign flow:** Set filters to automatically add leads to new campaigns. It can also be used with other mass email tools, and would be a solid addition to any mass email strategy that is ready to move to the next level.

Low-Medium: Mass Email and Basic Integration

Here's the catch:

- People often run into issues around global unsubscribe, user limitations, or limited templates.
- Form integration and social monitoring/publishing all has to be done separately, along with other efforts such as blogs and whitepapers. If you require these to all be in one solution, it's time for an upgrade.
- With MailChimp hacks like these, you can shortcut your way to some automation, but that's about as far as this level reaches. Also, not all of these solutions are not native to Salesforce, meaning you may be limited in what email data you can see on contact or opportunity records.



High: Mass Email and Full Marketing Automation

These solutions (Pardot, HubSpot, Marketo, etc.) pride themselves on content-centered, inbound strategy, and customer journey-building. They allow you to streamline efforts even when your audiences vary. You can use robust data and reports to provide context for your actions and rely on automation to fulfill the goals you set based on those numbers.

What a Higher Tier Can Do for You

Forms: create forms for everything from a contact page to a whitepaper download, and embed it on either your own website or a landing page template.

Lists: create dynamic and static lists that sync with Salesforce.

Social publishing and monitoring: tag all posts to specific, trackable campaigns.

Workflows: you can automate drip campaigns and much more.

Reduce duplicate issues: This is a biggie. Maybe you've gone through a few rounds of trying to use Web-to-Lead for things like newsletter subscriptions and whitepaper downloads before realizing it's not designed for that, and have problems with uploading duplicates. Reducing this stress is a big relief.

Even with all of this functionality, no system is perfect. It is ultimately up to you to be agile and willing to experiment to make the solution work for you.

What’s in It for You

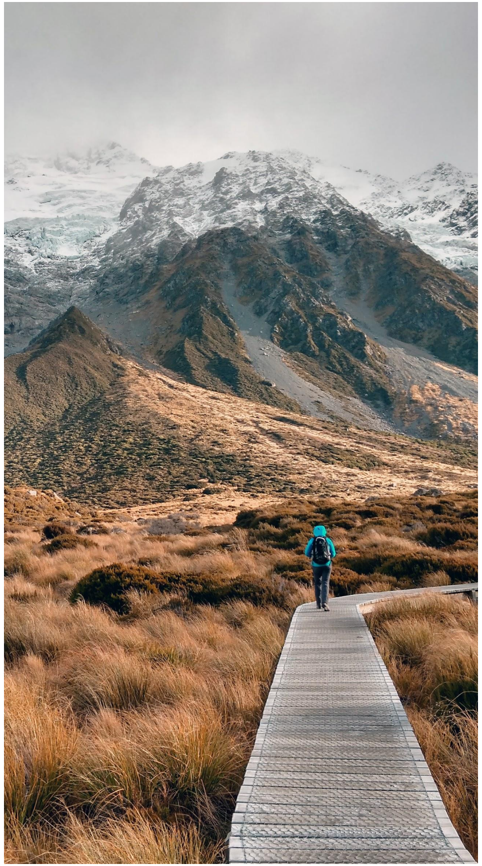
The Value Proposition for Nonprofits

So, at this point you have a baseline understanding of what marketing automation is and what options you have, but what return can you expect from your investment? Typically organizations feel impact most in these three areas:

LISTEN

QUALIFY

MEASURE + GROW

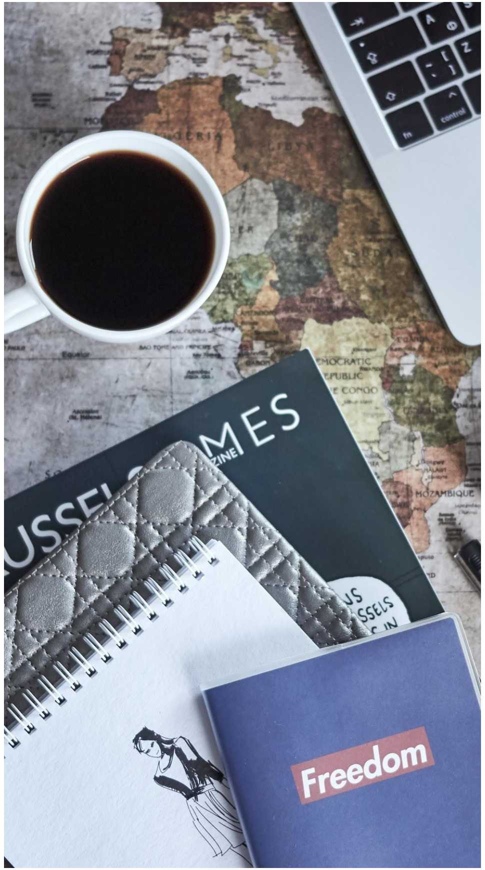


Listen: Learn What Your Prospects are Interested in

Use social monitoring and lead scoring on your website to see what content is most engaging. Then apply automated emails to give them more of what they want and are responding to. You could also use lead scoring to automatically give points to people who have strategic connections, for example, donor prospects who are connected to current board members.

Qualify: Focus Your Time on the Most Engaged Prospects

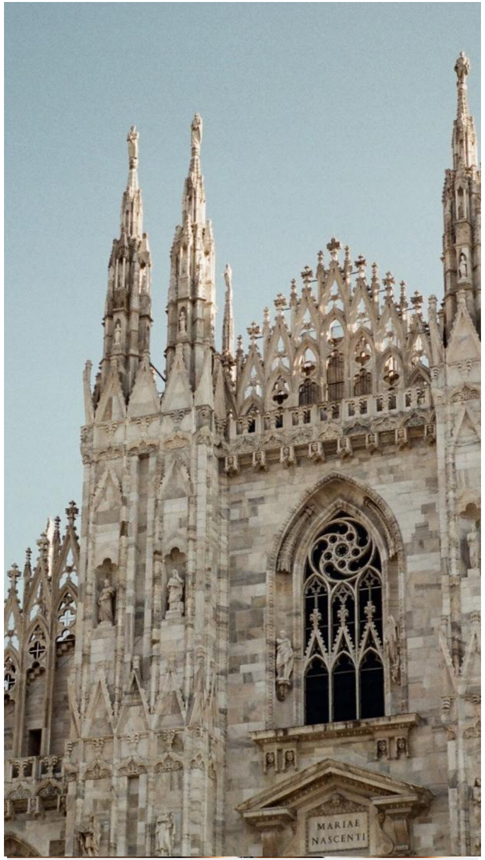
Use marketing automation to sculpt your moves management process. For example, instead of having your development staff do manual research on wealth data, you can qualify prospects instead by those who are most engaged with the lowest donations: they are likely prime candidates for giving a bit more. Ideally you want scoring and automated emails to help you identify those with the largest giving capacity and largest mission affinity. And remember: disqualifying prospects is just as important as qualifying them!



Measure and Grow: Increase Your Contact Base

Use marketing automation to reach more people and increase donations, by automating the follow up that happens after first-time donors give. Automation allows you to reach into new audiences without doing all of the legwork manually.

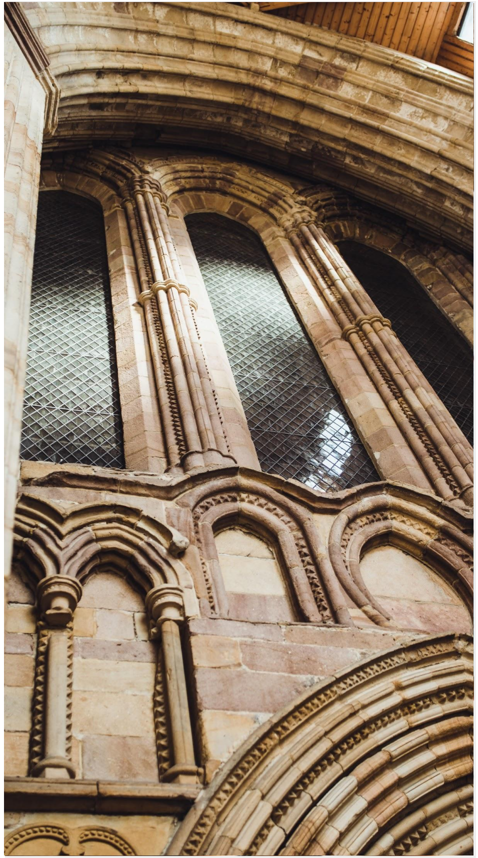
Marketing Automation in Action



The Story of St. Michael's Abbey

St. Michael's Abbey is a Catholic monastery in Orange County, California that found that their current Abbey was sitting on a fault line. This problem drove them to start fundraising $120MM to build a new abbey and maintain operating costs.

This ambitious fundraising project sparked them to purchase Salesforce and Pardot for data and moves management.



How They Did It

The first step was to expand their donor base. They had a firm create video content to draw in potential donors. By having Pardot gate those videos, **they grew their potential donor list from 4,000 to 19,000** by strategically using their content.

The next step was they hired a dedicated internal marketing resource to turn those prospects into one-time and recurring donors. With training from Idealist Consulting, their marketing manager learned how to use Pardot and created strategies to turn prospects into donors.

The Results

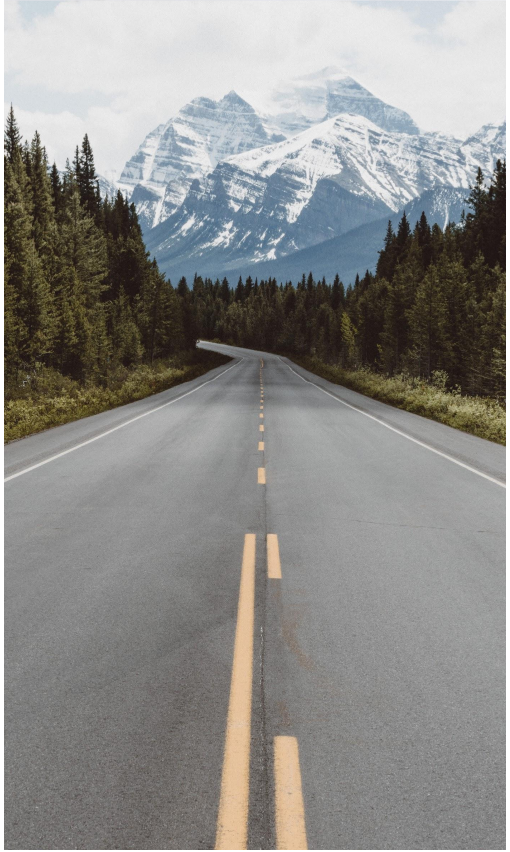
St. Michael's Abbey raised 66 times their annual operating expenses. They also had higher than average email open rates, and had a notable 163% increase in donations from 2017-2018.

It's important to note that Pardot wasn't a silver bullet. **They put in the time and resources to make marketing automation work for them.** To get the most out of marketing automation, you need to set goals and get the right people for the job.

Continue reading to see where you can start.

Learn more about St. Michael's Abbey's marketing automation journey.

First Steps



Set Goals

Identifying goals is your first step towards using marketing automation: without them, you won’t have any mileposts to guide your way and help you measure success as you start using your new tools.

Use this template to define your primary goals: how do you measure success in your role? What are the key metrics that you are held accountable to? Can you meet these goals with your current tools? These goals will help you show ROI with any new solution you adopt.

How I Measure Success	Goal #1	Goal #2	Goal #3	Goal #4	Goal #5
Think about key metrics that you use as benchmarks in your role. Check out the following examples of goals.	*Increase program enrollment/ membership by X%*	*Reduce administration data entry time by X hours per week*	*Increase recurring donation by X%*	*Increase leads by X%*	*Increase open/click rates on emails by X%*

How We Can Help

Idealist Consulting has certified consultants trained in marketing automation tools. We will help you pick the most appropriate solution for your organization and hit the ground running. We can help enablement, strategy, support and assessment.

Need more information? Check out these additional resources:

How to Modernize your Marketing Budget

How Nonprofits can use Pardot for Moves Management

KVIE Public Television uses Marketing Automation to Boost Membership

OPB Modernizes Communications with Pardot

We’re Here for You

Idealist Consulting helps progressive organizations grow through technology.

We educate, empower, and guide your team through Salesforce, marketing automation, and custom application development projects.

Founded by a Peace Corps volunteer in 2006 and headquartered on Portland’s historic Mississippi Avenue, we are proud supporters of our local community and a long-time B Corp using business as a force for good.

Learn more at www.idealistconsulting.com.

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