SmartEngagement Technology

Engagement Tools & Techniques for Today’s Nonprofits
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Nonprofits that face ever-increasing competition for their supporters’ time, attention, and donations are turning to SmartEngagement Technology to power the future of their operations.

Smart Engagement uses technology and automated processes to help your organization focus on the most important tasks and to make the best decisions possible. It's about giving your staff the tools and the information they need to make smart decisions every day. It optimizes your engagement, turns supporters into advocates, and streamlines your fundraising efforts.

Smart Engagement helps nonprofits who are doing good work become great at what they do.
How Nonprofits Can Make Data-Driven Decisions

Nonprofits that make decisions based on actual data will have a greater understanding of the needs, wants, and motivations of their supporters and advocates.

Collecting and acting on data follows a three-step process; measurement, analysis, and implementation. That process is then repeated as data collection continues and information on supporters is supplemented and refined.

1. Measure What Matters

All nonprofits look at the same core set of data on their constituents. Average donation amounts, events attended, email clicks, etc. You also track metrics from processes that are more unique to your individual organization. Oftentimes, those two sets of data get lost in siloed departments and you miss out on valuable information about how to best engage supporters.

2. Bringing it All Together in One Place

Smart Engagement Technology brings all your important data together, helps you evaluate key decision points, and gets the right message out to your supporters using the communication method they want when they want it.

3. Focus on the Greatest Benefit

Practicing Smart Engagement will help you reclaim hours of your day and increase the effectiveness with which you reach your supporters by:

- Discovering tasks with the greatest benefit to your organization:
  Online dashboards highlight the most important activities within your organization, such as major donations and fundraising campaign goal completions.

- Encouraging smart teams:
  Big-picture data helps you find trends, adjust long-term strategies, and make better decisions about future campaigns. Use smart tools to organize and segment your lists to make sure the right supporters get the right message at the right time. Learn the best times to reach your supporters online and what networks to find them on. Run A/B tests to continually monitor assumptions and pivot when necessary.

- Automating repetitive tasks:
  Internal notifications and automated reminders and workflows will ensure responses are always sent in a timely manner. Newsletter subscriptions, welcome messages, event invites, thank you emails, and donation receipts can all be automated, which allows your team to focus on more personal communication and driving new engagement.
Focusing on the Right Things

A nonprofit's goals are an extension of its mission. While your goals will, of course, be specific to your organization - we typically see goals set in the following broad categories:

- **Fundraising** - Total dollars raised, average gift size, number of donors, etc.
- **Supporter list growth and retention** - This includes growing the number of donors, and also identifying major donors and growing the donation levels of existing donors.
- **Effectiveness of mission** - Are you effecting change and making a difference where your donors expect you to be?
- **Marketing & communications goals** are also extremely important, but typically serve as a means to achieving more primary goals. For example, it is critical to track the number of people who are reached by your emails or your social posts, but these are likely a means to meeting your organization's overall goals.

When crafting your team’s goals, take care to make them specific, measurable, attainable, relevant, and timely. This set of criteria is often referred to as SMART (not to be confused with Smart Engagement). For further explanation and examples, we like this post by Hubspot about SMART Goals.

Examples of Nonprofit Organization Goals:

**Fundraising**

An overall fundraising goal is important, but consider adding more specific goals such as:

- **Program-specific goals** that can be tied directly to the impact those dollars can make.
- Use **goals based on donor characteristics** to track sectors in your supporter base that you want to grow (such as younger supporters), either because they are underrepresented or because they tend to have a higher engagement level.
- **Average gift goals**, often by donor category, can help you target and optimize communications and activities to drive the average donation up.
- The **number of new donors** and the percentage of donations coming from first-time donors is an important indicator of your organization's strength and stability.
Supporter List Growth & Retention

- **Overall retention rate** is an important indicator of the health of your donor list. You can measure not only the percentage of donors that return from one year to the next, but also supporters who volunteered, advocates who took action, and those who attended your organization’s events.

- **Group** - specific retention rates give you insight into the types of supporters that are staying with your organization and those that are leaving. For example, do younger supporters fail to return at a greater rate than older supporters?

- **List growth goals** - both overall and by supporter group - are a good measure of the effectiveness of your communications and marketing programs.

**Mission Effectiveness**

Mission-related goals are extremely specific to the organization and always focus on the impact your organization is having. **Some examples:**

**Food pantries & kitchens:**
The number of meals served, pounds of food distributed, and the number of families/individuals helped by your programs.

**Animal shelters:**
The number of animals touched by your organization, the number of pets placed in their forever homes, the estimated number of lives saved by your organization's efforts.

**Advocacy organizations:**
Legislative and judicial actions positively impacted by your organization, the number of actions taken by your supporters, number of people reached by your message (engagement on social channels, mail list size and growth, etc.)

**Environmental organizations:**
Legislative and regulatory issues that your organization has influenced, number of participants in environmental education programs you have run, and dollars raised to affect positive change.

**Health-related organizations:**
Dollars raised for research, number of patients assisted, number of medical experts educated or trained by your organization.
How to Evaluate Goals - and When to Update Them

Your organization’s goals should be used to:

1. Measure and communicate the success of your organization
2. Identify areas for improvement

It is important to evaluate your goals periodically. Annual goals are often evaluated quarterly, or when events dictate a change.

Evaluate goals based on the following criteria:

- **Have you been able to collect the data needed to measure performance to this goal?**
  
  If it has been difficult or costly (or not possible at all) to collect the data necessary to evaluate this goal you need to determine if cost is worth the benefit in this case.

- **Is the goal still reasonable?**
  
  Many organizations made changes to goals when the Covid-19 pandemic hit. Don’t stick with outdated goals when they no longer make sense - no one will be paying attention to them anyway.

- **Does the data support the goal?**
  
  Sometimes goals are based on the hypothesis that different types of supporters are reacting in different ways or that different types of campaigns have different success rates. However, once you begin to collect and analyze the data, it may become clear that the differences are so minor as to be useless to your organization. Don’t waste time tracking data and goals that won’t help you make smart decisions!

- **Is your team using information based on this goal to make decisions?**
  
  If they are not, you need to determine if this is because the goal is not as useful as you thought it would be - or if your staff and board needs more training on how to use the data.
Organizations that implement smart engagement find that separate departments learn how to work more closely with each other and often see a marked improvement with individual and team outcomes.

Fundraising Team

1. Optimize fundraising campaigns

With the right data available, today's nonprofits can optimize almost every aspect of their fundraising campaigns:

- **Communication timing & messaging** - When and how do your supporters engage with communications around specific campaigns?

- **Grouping supporters** - Which types of supporters participate in which types of campaigns?

- **Giving frequency** - How often, and when, does each supporter give?

2. Identify and nurture major donors

- **Notify key staff members** when a large donation is made by a new donor

- **Use third-party wealth data** to identify potential major donors

- **Give major donors the attention** they deserve by ensuring that you are notified when they make a donation or take other action on your website. Group major donors separately in your database, so that communications can be customized for them.

3. Customize ask amounts

Optimize your fundraising by asking for donations that match a donor's ability and propensity to give. Use dynamic ask strings (aka "ask arrays") which give a donor the ability to select one of a number of donation amounts - encouraging them to give a little more this time! Salsa gives our users the option of using our "smart" machine learning algorithm that takes into account a donor's demographic information, previous giving history, and many other data points to determine the optimal ask amount.
Communications Teams

1. Optimize email timing

Use A/B testing to determine the optimal time to send emails. This may be different for different types of emails and for different audiences. Be sure to test both!

2. Optimize email subject lines

Use A/B testing for each important email send (especially those that are not similar to others you have sent in the past). Consider testing 2 or 3 subject lines, along with different images.

3. Optimize social media posts

Tracking which types of posts your followers engage with, and when, is extremely important. Social media platforms offer their own reporting tools and you can also track this information offline. Categorize your posts into categories such as event announcement, behind-the-scenes, campaign updates, etc. Use those categories to report on engagement rates on each platform!

4. Personalize communications

Marketing 101 tells us that personalizing an email increases open and click-through rates. Don’t stop at putting the recipient's name in the subject line or body of the email, though. Including details about your supporter’s last donation or other personal details can go a long way in building a stronger relationship with your supporters.

5. Target communications

The more you can segment your supporter list into relevant groups, the better you can target messaging to those specific groups. Start with separating volunteers from major donors from board members and then get more specific from there. Make sure you:

- Include supporters in multiple groups when appropriate (a volunteer might also be a major donor).
- When crafting messages, send the more specific emails first, then exclude those recipients from following emails dealing with the same subject.

6. Automate communications

Automating email communications can save a lot of time, without harming your engagement rates. You should have at a minimum:

- Standard welcome series of emails that get sent to new supporters. The series should thank them, introduce them to your organization, and provide them with the opportunity to do more!
- Automated thank-you emails that are sent when anyone makes a donation, signs up for an event, request information, etc. dealing with the same subject.
Advocacy Teams

1. Stakeholder cultivation - from beginners to seasoned advocates

   Strong Advocacy systems will provide you with the ability to reach supporters who have different levels of understanding and commitment to your cause. Petitions are a great first step in engaging supporters who can then be provided with opportunities to contact their legislators, write letters, and become true advocates!

2. Legislator matching

   You want to make it as easy as possible for your advocates to contact their legislators on behalf of your cause. You will want a system that can ensure you have access to updated information on targets you need at the Federal, State, and Local level.

3. Automate and optimize supporter communications

   Increase engagement by providing your advocates with suggested letter text to help them communicate quickly and easily with their legislators.

4. Multi-channel outreach

   We know that legislators will take notice of an in-person visit or phone call by a constituent over an email or social media post. Be sure to simplify and automate multiple channels of communication for your supporters. **Strong advocacy systems let you create a holistic strategy deploying key communication channels when you need them:**
   - **Click-to-call functionality** automates phone calls for your supporters. The system should provide them with automated dialing and call scripts for each of their applicable legislators.
   - **Email messaging** provides supporters with standard email templates and messaging that they can automatically send to their legislators.
   - **Tweet-a-rep** allows your supporters to Tweet your message to selected legislators.

5. Customized targets

   While a good portion of advocacy efforts are aimed at local, state, or federal legislators - some advocacy campaigns will have other targets, such as corporate CEO's or legislative candidates. Make sure that you are able to upload custom targets if this is a requirement for your organization!

6. Targeted messaging

   The more you can target and customize your messaging for the individual legislator, the more effective you
can be. You may want different messages for legislative allies, key committee members, etc. Smart advocacy systems will provide the right message to each advocate based on who their legislators are.

**Regulations.gov integration**

Passing (or defeating) legislation is often only the first part of the battle. Keeping watch over pending regulations and public comment periods is key to ensuring that your cause is successful. By providing your advocates with easy access to the regulations that matter, and the ability to quickly comment on those regulations, you create a strong presence through the entire legislative AND regulatory process.

**Personalize supporter outreach**

The more you understand about your supporters, and the actions they have already taken, the more you can target your messaging to them. For example, you will want different messaging for:

- **Advocates who have taken action** on similar issues in the past vs. those who have not
- **Super-supporters** that may be open to posting on their own social media channels and taking further action
- **Advocates who have not yet taken action** on a current issue (and need to be reminded)

**Fully integrated advocacy campaigns**

Strong advocacy systems will be fully integrated with marketing automation tools and online website and form tools, allowing your organization to:

- **Segment and target supporters** based on actions taken, demographic information, and more.
- **Create automated email campaigns**
- **Embed petitions and targeted actions** on your website and on partner/campaign branded websites.
- **Share advocacy campaign information** via social channels automatically
Features of SmartEngagement Technology

Smart Engagement Technology: What to Look For

Basic features
As you begin to invest in SmartEngagement technology, look for the following features that will help you collect and analyze the right data and use it to more efficiently to tell your story.

» Substantial donor management database (including custom fields)
The base of good SmartEngagement Technology is a strong donor management database. Rich donor profiles that include demographic information and activity history allow organizations to:

- **Personalize communications** by using donor data in emails and text messages
- **Target messages** and group supporter records into multiple categories
- **Build stronger relationships** with your supporters by tracking unique information through the use of customized fields. For example, animal rights organizations may track supporters' pet's names.

» Sophisticated reporting
Smart Engagement reporting includes, at a minimum, standard nonprofit operational reports such as:

- **Fundraising campaign activity** - providing information for evaluating the success of campaigns and optimizing future campaigns
- **Donor activity, such as LYBUNT and SYBUNT reports** (Last year/Some years, but not this year) - allowing staff to find and prioritize opportunities within the current donor base
- **Communication effectiveness** - measuring email open rates, engagement levels for email and social posts, and other communication success measurements allowing communications to be optimized.

» Triggered notifications
Triggered notifications ensure that your staff are notified of activity that needs attention. For example, triggering an automated email to key staff members when a donation over a certain amount is made will ensure that major donors are identified and responded to quickly.
Automated email series
Automated email series, such as a standard welcome series for first-time donors, enable you to standardize communications and improve engagement rates through consistent messaging.

Personalized communications
Personalizing email communications with supporter data is shown to increase open and engagement rates.

Constituent grouping and targeting
The ability to target the right message to the right audience is extremely important to organizations seeking to improve engagement rates and minimize supporter attrition. Organizations practicing smart engagement need the ability to group or tag constituents by demographic, personal, and activity data.

Advanced features
*Features specific to the best smart engagement systems:*

A/B testing automation
The ability to A/B test email subject lines and other information is necessary to optimize those communications for open and engagement rates. While A/B testing can be done by manually sending different versions of an email and tracking response rates - smart engagement systems provide for automated A/B testing that incorporates best practices and can be customized to meet your specific needs.

Next suggested gift calculations
Nonprofits know that the best way to optimize donations is to ask a donor for the right amount. Too little, and you leave money on the table - too much, and you may not get a donation at all. Because each donor has a different ability and tolerance when it comes to donating, the ability to customize the ask amounts for each donor is imperative. Smart engagement systems provide the ability to calculate "next suggest gift" amounts based on giving history, wealth data, and other criteria.

Dynamic ask strings
Combined with next suggested gift amounts, dynamic ask strings can be used to customize the donation options presented to donors via online donation forms.
- **Customizable advocacy campaigns**
  Smart engagement techniques are extremely important for advocacy organizations, and include the ability to create custom target lists, customizable messaging, and multi-channel campaigns.

- **Advanced, customizable reporting**
  Advanced SmartEngagement Technology goes beyond operational reporting to provide strategic level information and intelligence. For example:
  - **Donation analysis** that assist with identification of potential major donors and optimization of targeted fundraising campaigns.
  - **Detailed email reporting** allowing for optimization of message content, timing, and more.

- **Machine learning**
  Software that uses machine learning is capable of making decisions based on data - the more data, the more accurate the decisions (just like your music app that gets better and better at recommending songs). SmartEngagement Technology uses machine learning to predict things like which donors are potential major donors - even if they haven't made a large donation yet.