Marketing Automation 101

For Nonprofits

idealist CONSULTING

Contents

Intro

You are on the cutting edge.

Did you know 60% of the buyer's journey is complete by the time he or she reaches out to a company? By 2020, this rate is projected to be 85% or higher.*

Now consider what this means to nonprofits. Your donor, member, and volunteer prospects are used to self-serving as consumers until they're ready to buy: they research everything from baby strollers to rain boots through peer reviews and targeted email offers, not by talking to the company directly.

Your audience expects to engage with nonprofits in much the same way: enticed by a heartstring-pulling mission, nurtured through thoughtful stories of how this organization uniquely addresses an issue, and finally "sold" by a clear call to action to donate, volunteer, or become a member. And once they're in, they want it to be easy to stay engaged through social media, membership renewals, peer-to-peer fundraising campaigns, and local events.

The thing is, most nonprofits aren't here yet. By reading this whitepaper, you're placing yourself in a conversation that is shaping the industry; you're on the cutting edge. If you can start setting a foundation for using marketing automation at your nonprofit **today**, you will see incredible returns in the next few years. Once marketing automation platforms become the norm for nonprofit relationship management, you'll be leaps and bounds ahead. So let's get started.

**Data courtesy of Pardot and Salesforce*

What is Marketing Automation

"Marketing automation works to automate your communication programs, allowing your team to automate and optimize lead generation and nurturing programs from initial prospect contact through the entire customer process."

- *Pardot website*

At its best, this could look something like Amazon: your prospects get highly personal and useful messages and content that makes them want to buy (or donate, or volunteer, or advocate) more.

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

In between those two extremes is a sweet spot where nonprofits can live happily: where marketing automation software is applied to a well-defined communication strategy and lets you **increase your donor base and program impact organically through content**. This allows a small staff to engage more deeply since they are no longer spinning their wheels with manual work such as spreadsheet uploads.

Marketing automation generally includes all or most of these features:

Too salesy for you? Here’s how this applies to nonprofits:

1. 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”.

2. Forms

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

3. 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.

4. Social Media Publishing

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

5. SEO/Keyword Tools

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 engines like Google. Nonprofits can consider key aspects of their mission or programs as potential keywords.

6. 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.

7. 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.

8. 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.

9. 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.

10. Blog

Blogs 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?

You'll be best poised for marketing automation success if you fit these criteria:

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

If your revenue is less or you have fewer contacts, marketing automation may be cost prohibitive and too robust for your use.

Dedicated staff are equally critical: these are the people who will read the reports and consult the analytics to continually modify your marketing strategy.

But most importantly:

You must have felt some sort of pain or limitations with your existing communications solutions.

Does this sound familiar? You cobble together dozens of free or discounted solutions like Hootsuite, Google Analytics, MailChimp, landing page builders, and form builders. At a certain point you realize "Wait, I can't scale my communication program any further with what I've got. It's time for a change." 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.

1. Low: Mass email only (MailChimp, Vertical Response)

Many nonprofits start with free or low-cost mass email systems that may or may not provide integration with Salesforce, such as MailChimp, Constant Contact, Vertical Response, Soapbox Mailer, or Emma.

What they include:

- Easy to use WYSIWYG email editors
- Future send scheduling
- 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.

Here's the catch:
People often run into issues around global unsubscribe, user limitations, or limited templates.

With MailChimp hacks like these from Kissmetrics, you can shortcut your way to some automation, but that's about as far as this level reaches. Also, many of these solutions (with the exception of Soapbox Mailer) are not native to Salesforce, meaning you may be limited in what email data you can see on contact or opportunity records.

2. Medium: Mass email + campaign automation (Predictive Response)

Predictive Response is a great next-level solution for lite marketing automation. It is built around the Campaigns object and is native to Salesforce, so integration happens as soon as you install it, letting you focus on strategy.

What it can do:

- Scheduled, Drip and Adaptive emails. Scheduled emails are for set communications like newsletters or one-off emails. Drip emails send a series of messages at select intervals, whereas adaptive includes a four-part series where a pre-determined email is sent depending on whether the member opens and clicks the previous emails, complete with the ability to set a completion action to remove people from the campaign.

- Lead Scoring: You can set scores for opens, clicks, etc, that automatically show in the lead or contact object.

- CampaignFlow lets you set filters to automatically add leads to new campaigns. For example, adding new web leads to a welcome email series.

**Note: CF 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.*

Here's the catch:

Form integration and social monitoring/publishing all has to be done separately, and other efforts such as whitepapers, webinars, and blogs won't be directly linked to lead nurturing either. If you require these to all be in one solution, it's time for tier 3.

3. High: Mass email + full marketing automation (Pardot, HubSpot, Act-On)

These solutions 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 fulfil the goals you set based on those numbers.

What they can do:

- 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 smart 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 really designed for that, or used Form Assembly 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

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: Learn what your prospects are interested in

example: 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 5 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

example: 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 + GROW: Increase your contact base

example: use marketing automation with Classy 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.

Step one: 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.

Directions:
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	*Think about key metrics that you use as benchmarks in your role. For example:* •*Increase revenue by X%* •*Reduce administration data entry time by X hours per week* •*Increase leads by X%* •*Increase open/click rates on emails by X%* •*Increase program enrollment/membership by X%* •*Increase recurring donation by X%*
Goal #1	
Goal #2	
Goal #3	
Goal #4	
Goal #5	

How we can help

The savvy nonprofit (with no competing priorities like year-end fundraising campaigns or upcoming gala events) can implement these tools themselves. But whose reality is that? You can expect a **faster implementation with quicker results** if you enlist the help of a consulting team to help you think through your new strategy and how it will integrate with your CRM.

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.

Get Started

Interested in taking the next step toward marketing automation? Sign up for our free assessment to help you figure out what tier is most appropriate for your organization.

Sign up here: http://bit.ly/1F2TwYR

www.idealistconsulting.com | 800.889.8675x1

About Idealist Consulting

Idealist Consulting is not just focused on doing well, but doing good. We provide nonprofits, businesses, and government with advanced technical solutions that help them run more efficiently. Whether it is Salesforce consulting, mobile development, or technical training, we provide thoughtful and ethical support.

Idealist Consulting is a certified B Corp, has implemented over 750 projects, is recognized as one of the original Salesforce implementation partners and has been a top-rated consulting firm on the AppExchange for six years running, and is endorsed by Gartner for high-speed, low-risk Salesforce deployments.