



YOUR DIGITAL MARKETING HANDBOOK

# Attracting, Educating And Converting Donors Through Digital

How a digital marketing strategy will grow your donor base and increase your planned gifts.

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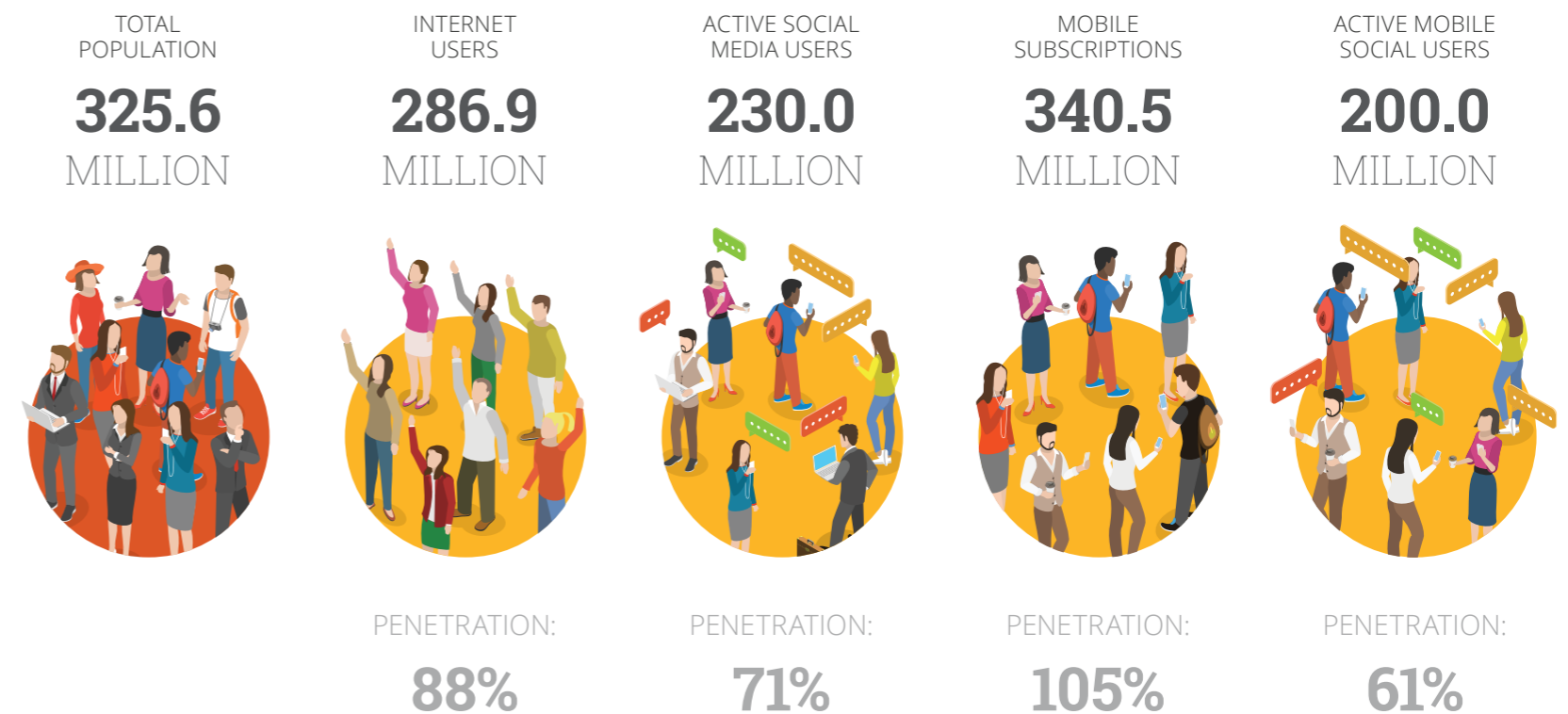


# Our lives have become increasingly digital.

Browsing on mobile devices has eclipsed desktop scrolling, social media user numbers continue to climb and we're spending more time in front of screens. It's no surprise the average American spends roughly 24 hours each week online, and that number is on the rise. In fact, the number of hours Americans spend on the internet has more than doubled since 2000.<sup>1</sup>

## THE UNITED STATES OF AMERICA

A SNAPSHOT OF THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS



# YOUR DIGITAL FOOTPRINT EXISTS **WHETHER YOU KNOW IT OR NOT**

For businesses and nonprofits alike, having an online presence is no longer optional. It exists whether your organization has a defined digital strategy or not. Google your organization. What do you find?

Maybe your search returns a glowing article, or an enthusiastic thank-you from someone your organization helped. But you might find other things, too. Remember that 2017 campaign landing page? The campaign is over, but no one took down its page. And then there's the negative review from a donor who didn't get a thank-you. Or it might be inaccurate directions to your location that confuse your visitors.

Are you happy with what you found? No? Here's some bad news: Your supporters and prospects are finding the same things—and probably more.



## **DIGITAL FOOTPRINT:**

ONE'S UNIQUE SET OF TRACEABLE DIGITAL ACTIVITIES, ACTIONS, CONTRIBUTIONS AND COMMUNICATIONS THAT ARE MANIFESTED ON THE INTERNET OR ON DIGITAL DEVICES.

# THE SELF-DIRECTED CONSUMER

Digital has given the power to the consumer.

Salespeople, or in your case, you (as the person “selling” the value of your nonprofit to donors) have become secondary—less important in the buying (i.e., donating) process. Thanks to digital, consumers can research, compare and build their own perceptions of your brand without ever speaking to you or stepping into your office. In fact, a study done by the CEB Marketing Leadership Council found that customers are nearly 60 percent through their buying decision-making process before they ever engage with a salesperson.<sup>2</sup>

It's vital to the success of your nonprofit and the success of your planned giving program that you take control of your digital presence.



THANKS TO DIGITAL,  
TODAY'S CONSUMERS GET  
MORE THAN HALFWAY  
THROUGH THEIR BUYING  
JOURNEY BEFORE ENGAGING  
WITH A SALESPERSON.

## INTENTIONAL DIGITAL

DIGITAL MARKETING DOESN'T HAVE TO BE COSTLY OR INTIMIDATING, BUT IT DOES NEED TO BE INTENTIONAL. Instead of trying to master every aspect, find a solution that best fits with your organization's mission and vision for the future. Focus on the digital channels that will resonate with your audience and work to achieve your mission. Invest in the future of your organization by taking the time to consider how simple digital strategies can help propel your mission forward.

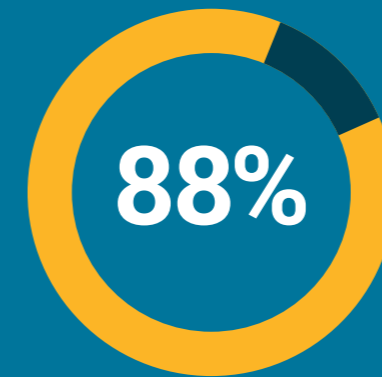
# WHY DIGITAL **AND** WHY NOW?



# EVERYONE IS **ONLINE**

If your organization isn't putting thought behind your online presence, you're missing face time with your donors and prospects.

In the U.S. alone, 286.9 million people report being internet users.<sup>3</sup> That's 88 percent of the population. And 230 million (71 percent) are using social media.<sup>4</sup> If you assume that your target audience for planned giving is not represented in these numbers, think again. In 2018 the percentage of U.S. adults age 65+ who say they use the internet was 66 percent,<sup>5</sup> with 46 percent of this age group reporting they own a smartphone.<sup>6</sup> Being online is no longer a planned activity—it happens in the grocery line, at the doctor's office and even at the supper table.



OF U.S. IS  
ONLINE



OF ADULTS  
65+ ARE  
ONLINE



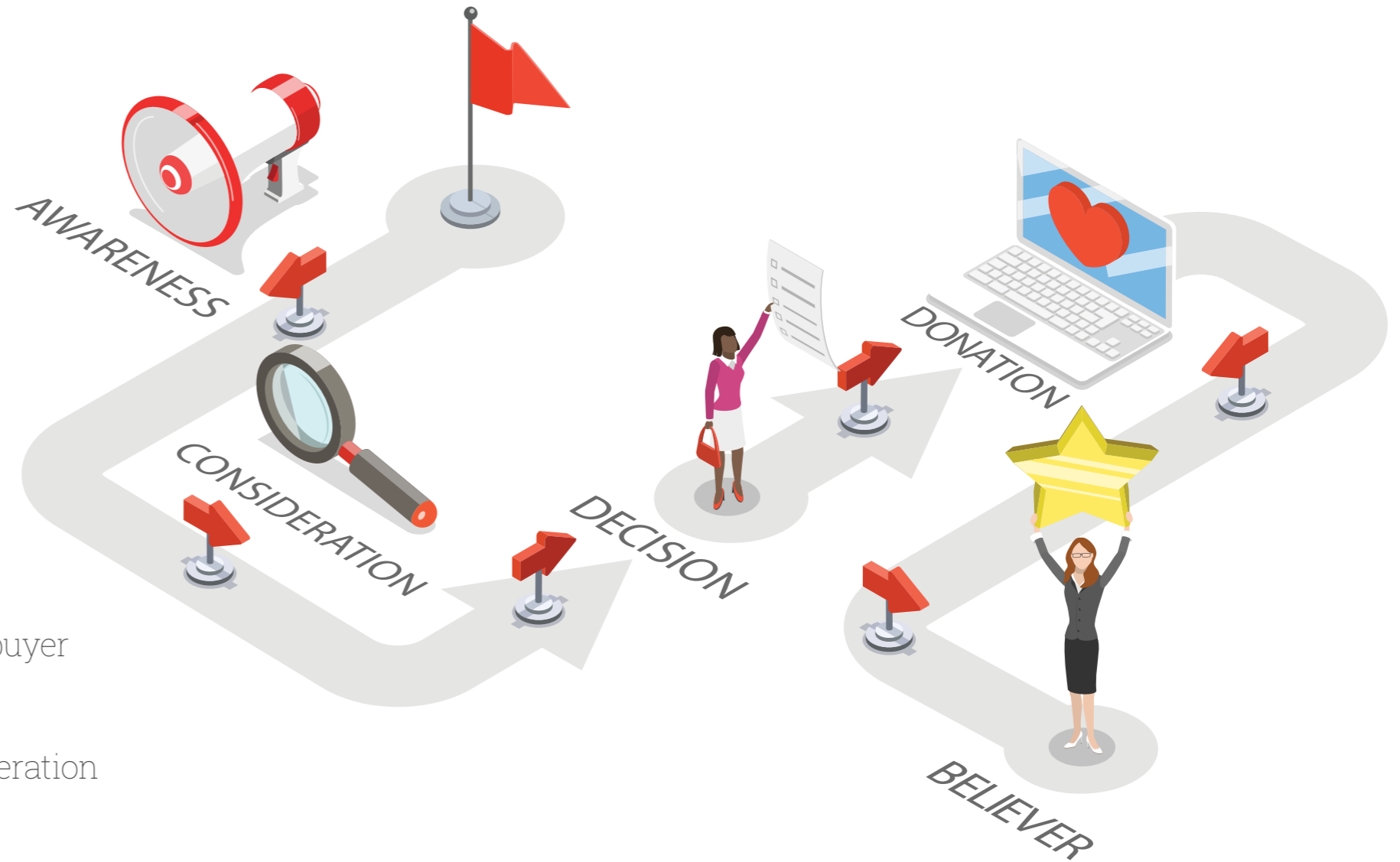


# YOUR DONOR'S DIGITAL JOURNEY

Something critical is impacted by digital: the buyer's journey. The "buyer's journey" refers to the process a buyer goes through to purchase something. The journey is generally broken into three stages: awareness, consideration and decision.

A study by SiriusDecisions showed that **buyers tend to carry out 67 percent of their buying journey digitally.**<sup>7</sup> In his recent article "Understanding Your Donor's Journey," Nelson Musonda shares that the "donor's journey" is very similar to the "buyer's journey"—with just a couple of additions. After the decision phase comes the "donation" phase and finally the "believer" phase. Musonda writes, "The donor's journey calls for a website that is designed to convert."<sup>8</sup>

A digital presence offers your supporters an important channel for moving through their donor journey. Your digital content should educate, bringing awareness to your mission



and needs. It should also offer content to take readers through the consideration phase, outlining opportunities to give and demonstrating the impact their support will make on your mission. Finally, there must be an easy path for the visitor to make and execute their decision, moving them into the donation phase.

Offering content that both educates and converts is especially important in the planned giving space. For most, the decision to leave a planned gift is a long-term process. Your online presence provides a place for those interested to learn about this opportunity and take the next step when the time is right.

# OPEN YOUR **(DIGITAL)** DOORS

Your supporters may never be able to visit your office. They may not be able to meet the children, animals or students their donations support—in person.

**This is where digital becomes so powerful.** With an intentional digital strategy, you can still become a part of their daily lives. Using social media, email or your website to share behind-the-scenes photos and videos of your organization's activities—volunteers donating to your blood drive, a 20-year class reunion or recently rescued puppies—helps draw in your supporters, connecting with them on a personal and emotional level.



# GET A CLEAR PICTURE THROUGH **DIGITAL DATA**

You may think you know your donor—and maybe you do. Front-end models allow you to identify donor propensity and capacity, helping you to build a donor profile. But the addition of data collected from your own digital marketing will help to paint a more accurate picture.

Your donors' personalities, characteristics and behaviors become clear. Who is looking at what? Are they male, female, young, old, a longtime supporter or someone who has never given? What content are they interested in? What time of day do they want to interact? Which day of the week do they want to hear from you? You'll learn this and so much more.

Sophisticated digital marketing automation systems take this a step further and deliver you individual tracking results for each website visitor. This information is valuable when



## **NO MORE ANECDOTES: DONOR PROFILES THAT REALLY WORK**

**According to Signalfire, these three questions are critical to really knowing your donor:**

1. Can you specifically describe the everyday habits of your ideal donors?
2. What motivates them?
3. What is the binding agent between one donor and the next?

**And to build a donor profile that works—helping you uncover new donors and increase your donations—you need to collect these types of data:**

1. Demographics
2. Personal history
3. Method of donation
4. Giving capacity
5. Communication preference, and specifically how they like to be thanked

Signalfire. "Increase Donations: How to Create Donor Profiles for Non-Profits." (2017, September 11) <https://signalfire.us/blog/increase-donations-how-to-create-donor-profiles-for-non-profits/>

you're working with an individual donor, helping to uncover their specific interests. Additional functionality allows custom content to be delivered to specific visitors.

Whatever level of digital sophistication you land on, one thing is clear: The more digital outreach you do, the more complete picture you'll have of your supporters—and what compels them to take the next step in supporting your mission.

# BOOST YOUR **BOTTOM LINE**

Your digital marketing efforts can have an immediate impact on your total revenue.

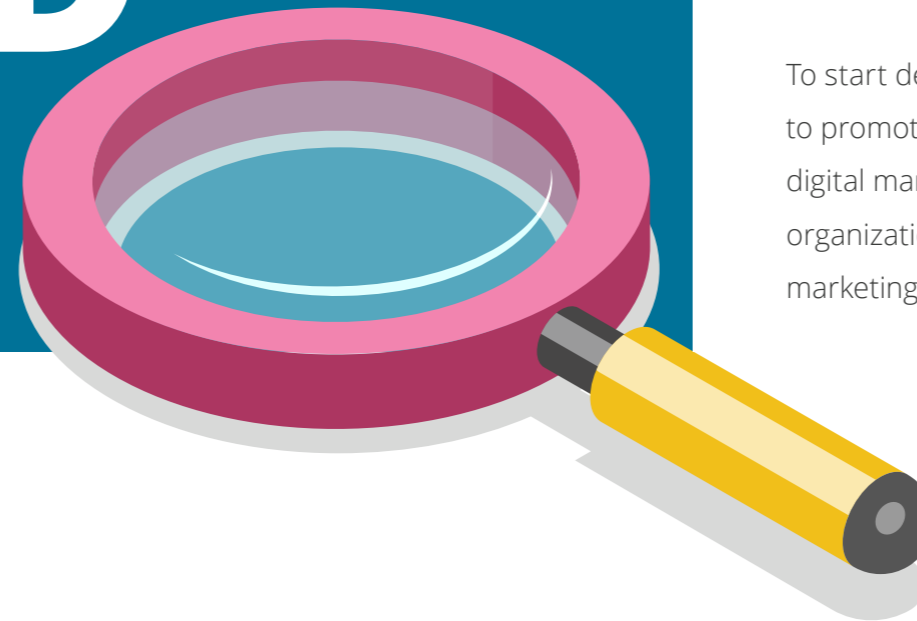
In 2017, the average nonprofit raised 7.6 percent of its total revenue online.<sup>9</sup> That's up from 7.2 percent in 2016 and 7.1 percent in 2015.<sup>10</sup> That's a significant amount of funds attributed solely to digital.

Perhaps you don't feel confident in your abilities to succeed when it comes to digital marketing—many nonprofits don't. Sixty-six percent of nonprofits that responded to a recent survey stated that they were concerned about missing out on online fundraising opportunities.<sup>11</sup> Which makes sense. If you don't have an established digital presence and your supporters are not familiar with interacting with your organization online, it's a leap to expect them to feel comfortable donating to you through a digital channel.

**WHICH IS JUST ONE MORE REASON  
TO DIG IN TO DIGITAL—NOW.**



# DIGITAL CHANNELS DEFINED



You have some important decisions to make when it comes to choosing which digital channels will work best for your organization, and in particular, for planned giving. Just because an avenue exists doesn't mean you must, or even should, take advantage of it.

To start defining your digital strategy and the tactics you'll use to promote planned giving, it's important to learn about the digital marketing options available, to figure out which ones your organization may already be using and to collaborate with your marketing cohorts to ensure planned giving is a part of these efforts.

# PLANNED GIVING WEBSITE

A website is so much more than a place to “sell” visitors on your programs and services. A strong web presence should share your mission with an interested newcomer, demonstrate the impact of your work and provide clear action steps for getting involved. Existing donors should find easy, straightforward options to take their commitment to the next level.

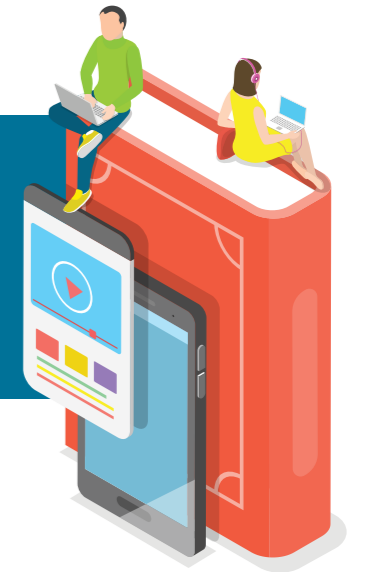
Your marketing department is likely responsible for the development and maintenance of your organization’s website. Work with them to determine how planned giving can best be represented online. You may decide to start small and simple. Adding basic information to an existing donation page—your organization’s legal name, federal tax ID, bequest language and your department’s contact info—is a good place to start. Or, you may want to go further and develop a more robust presence. Sharing impact stories, donor testimonials and simple descriptions and benefits of various giving options can help visitors find and choose a path to support your mission.

“INTERNET/WEBSITES” RANKED THIRD FOR BEING THE INFORMATION SOURCE “I PREFER TO FIRST LEARN ABOUT A NONPROFIT.”

As demonstrated by findings from the most recent NMI Healthy Aging Database® study, your website can play a very important role in a donor’s decision-making process. In the study, when asked which information sources were most influential in motivating donors to donate, “internet/websites” ranked fifth, with 14 percent of U.S. adults saying they have “a lot of influence on my decision to donate.” Additionally, “internet/websites” ranked third behind only personal experience and friends/relatives for being the information source “I prefer to first learn about a nonprofit,” with 8 percent selecting this choice.<sup>12</sup>

Ensuring that your organization’s website is mobile-friendly, with mobile-optimized content, is essential. Seventy-seven percent of U.S. adults now own a smartphone, with 20 percent being “smartphone-only” internet users—meaning they don’t have in-home broadband internet service, so any online activity is being done on their phones.<sup>13</sup> This reality requires your web content to be designed so it’s easily digestible on a mobile phone, with large, easy-to-click links, buttons and calls-to-action.

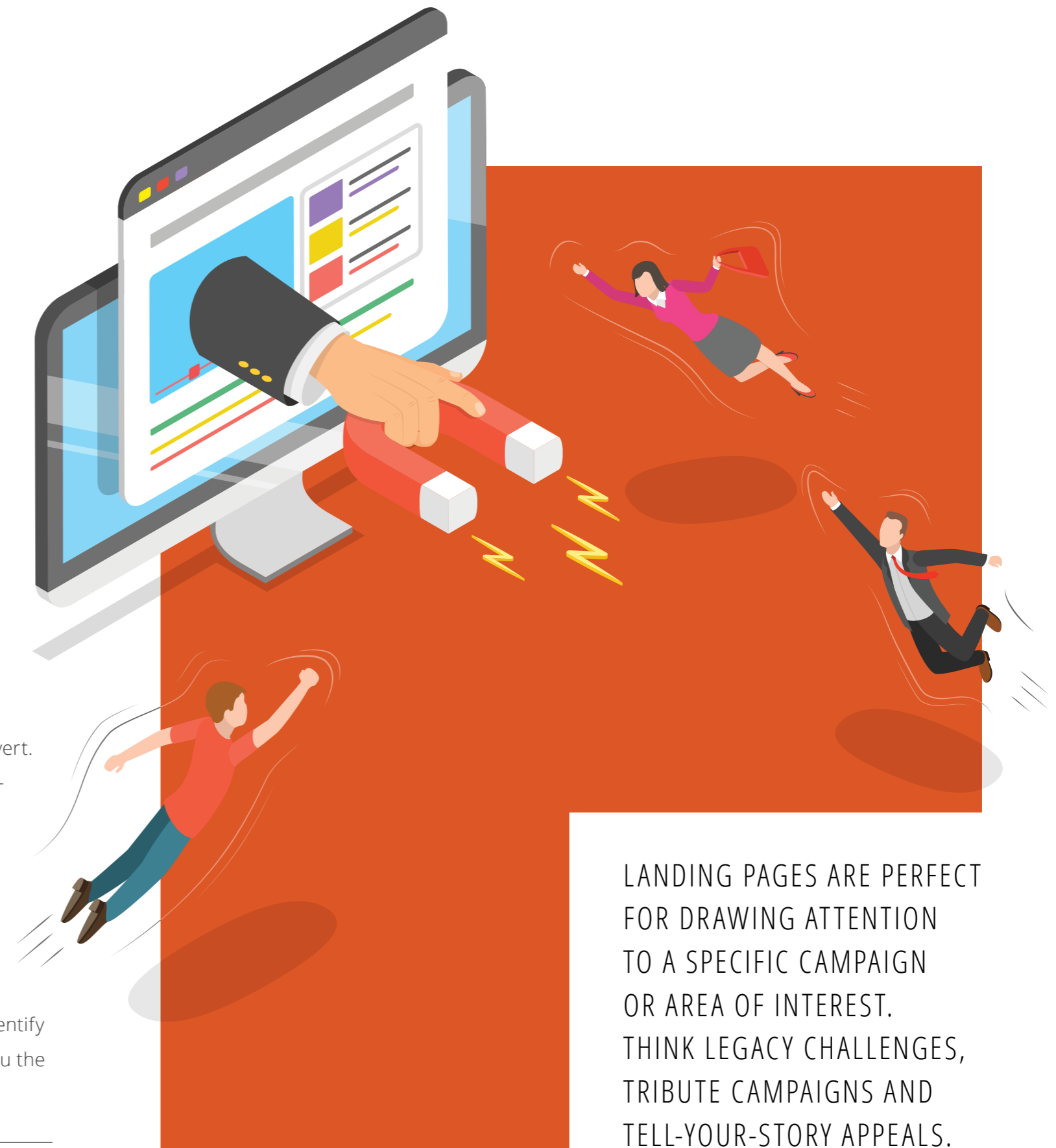
Search Engine Optimization (SEO) is also vital to help interested prospects find you online. Done correctly, SEO grows your visibility in search engine results. Over half of all website traffic comes from organic search<sup>14</sup> through engines such as Google, Yahoo! and Bing. So, if Google (92 percent search engine market share<sup>15</sup>) can’t find your site or the valuable content housed there, it can’t index it and serve it up to interested users who are searching. There are many aspects to SEO, from the technical (code and site structure) to the creative (words and pictures), that affect how other websites link to yours. Your marketing team may have an SEO expert to assist with this endeavor, but you may also need to seek outside assistance.



# PLANNED GIVING LANDING PAGE

While your website may be likened to an encyclopedia of information, with various chapters on specific topics used to educate your visitors, a landing page is quite the opposite.

A landing page is a stand-alone web page, designed for just one purpose—to convert. Many marketing drivers—digital tactics such as email and social posts work best—combine to push your supporters to the page to perform one clear action step. [\(Learn more about marketing drivers and destinations on page 18.\)](#) For example, you may have a goal of getting 10 more IRA gifts this year based on last year's successes. Create a targeted email driving to a landing page that offers visitors a brochure about new tax legislation and how it impacts a gift from their IRA. A simple form asks visitors to supply their contact information prior to download so that you know who expressed interest in the topic. This helps you identify those in your database that are thinking about this type of gift right now, giving you the opportunity to start a conversation.



LANDING PAGES ARE PERFECT FOR DRAWING ATTENTION TO A SPECIFIC CAMPAIGN OR AREA OF INTEREST. THINK LEGACY CHALLENGES, TRIBUTE CAMPAIGNS AND TELL-YOUR-STORY APPEALS.

# PLANNED GIVING

## EMAIL

As with traditional direct mail, email marketing is an effective way to communicate with your constituents and spur action.

Statistics show supporters are receptive to engaging with nonprofits through email. The average open rate for nonprofit email marketing campaigns is 24.11 percent.<sup>16</sup> That comes in higher than the average open rate for email marketing campaigns for other industries (20.81 percent).<sup>17</sup> Nonprofits again best the industry with click-through rates averaging 2.57 percent, compared with 2.43 percent for all industries.<sup>18</sup> Email is a fantastic tool to drive traffic to your website for more information or to a landing page for a specific call-to-action, or to make a personal appeal for a supporter's time, feedback or contribution. In fact, in 2017, email messaging resulted in nearly one-third of all online fundraising revenue (28 percent).<sup>19</sup>

One aspect of email marketing that can have a real impact on your success is list segmentation. In a 2017 study done by Mailchimp, segmented campaigns performed

markedly better than their non-segmented counterparts. Open rates were 14.31 percent higher and click rates were 100.95 percent higher than non-segmented campaigns.<sup>20</sup> This makes sense—people spark to information that's tailored to them. Instead of clogging your supporters' inboxes with every potential email, consider sending separate campaigns to smaller segments of your list. Not sure where to begin? Try segmenting your list by age, life stage, location or area of interest. Run a report of all donors who gave to a specific cause and create an email campaign just for them focused on a related topic. Or create a campaign for those who gave an annual gift at a certain level within the last 18 months and introduce them to the idea of "planned giving"—a way to achieve their philanthropic goals with both annual and planned giving. The more personal and relevant the content, the more likely you are to see results.

### QUICK FACTS

Email Service Providers (e.g., Gmail, Outlook, Yahoo! Mail) are continually changing their algorithms for determining which emails make it into the inbox. While their specific delivery parameters are secret, some of the metrics considered are:

- » Spam complaints
- » Bad addresses
- » Email engagement
- » Unsubscribe requests

**This boils down to one thing: You must send content that's relevant.**



# BLOG

One way to incorporate robust, valuable content on your website is through a consistent blog presence.

A blog gives you the opportunity to create and share content that may not have a natural fit elsewhere on your website. Your organization may already produce a regular blog. **We are not recommending your planned giving department start its own.** But there's no reason you can't be a part of it. Work with marketing to agree on a content plan that feels manageable and expand your scope as you go. Perhaps you commit to sharing one donor story each month. As you build momentum, add an impact story and a photo-heavy post from a recent event.

Blogs also offer an easy way to engage your audience by asking for their input on your content. Posing a question in your blog invites readers to share their opinions and start a conversation with you and your other followers. You may even ask one of your advocates to share their own experience with your organization by writing a guest blog.



QUICK TIP

## 5 BLOG HEADLINE HEROES

Your headline is the most important part of your blog. It does the heavy lifting: catching attention and sparking enough interest to ensure your article gets read. Here are five proven headline formulas that work:

### 1. How-To

How to Update Your Will in 60 Minutes or Less

### 2. Numbers (Lists)

7 Little-Known Ways to Make a Huge Impact

### 3. Demonstrate a Clear Benefit

The ABCs of Estate Planning: Easier Than Changing a Tire

### 4. Avoid a Negative Outcome

Avoid These Short-Sighted Giving Tactics

### 5. Facts, Statistics and Examples

CASE STUDY: Like Shirley, You Too Can Be a Hero

# MARKETING DRIVERS VS. MARKETING DESTINATIONS

## MARKETING DRIVERS



### DIRECT MAIL

Share news of your impact and progress. Suggest ways to help. Be there, in hand. As an expected part of your donors' lives.



### TARGETED MAIL

Select supporters who stand out from the crowd. Wow them with a unique mailing. Invite them to make a difference in a specific way.



### EDUCATIONAL EMAIL

Pique donor interest. In the good work you do. The difference they can make. Drive them to your website to continue learning.



### TARGETED EMAIL

Bring urgency. Call attention to. Make an ask. Keep it simple. Drive them online to take action.



### MAIL & EMAIL SURVEY

Find out. What means the most. Why they care. What you are doing right. What you are doing wrong. Take the info and take action.



### SOCIAL MEDIA POST

Grab attention. Drive supporters elsewhere to learn more, take action, make a difference.

## MARKETING DESTINATIONS



### COLLATERAL

The leave-behind. For those that want more, can't get enough. Nitty-gritty details.



### LANDING PAGE

Be a destination. Make an ask. Don't let them walk away empty-handed. Give them what they came for.



### PLANNED GIVING WEBSITE

Be there, online. A trusted resource. For when it's needed, wanted. Share news of your impact and progress. Suggest ways to help.

# SOCIAL CHANNELS DEFINED



# WHY SOCIAL MEDIA?

Social media is an increasingly popular and effective digital marketing channel. Remember, 71 percent of American adults are using social media.<sup>21</sup> And they're using it for more than two hours each day, the largest percentage of online media time spent (32 percent).<sup>22</sup>

Unsurprisingly, millennials (born 1981-96) and members of Generation Z (born 1997-2012) are fervent users of social media. Almost 71 percent of Americans ages 16-24 use Instagram and close to half of that have Twitter accounts.<sup>23</sup> But it's not just younger generations that are taking to social media. People over 55 are expected to become Facebook's fastest-growing audience this year; 500,000 new individuals had been expected to join the platform before the end of 2018. This will make this more mature demographic second only to users ages 16-34.<sup>24</sup>

While some platforms are more popular than others, the typical American uses an average of three social media platforms.<sup>25</sup> Depending on your organization's goals and target audience, some platforms will be better suited than others to incorporate into your marketing efforts.

QUICK FACTS

## PERCENTAGE OF U.S. ADULTS WHO USE EACH SOCIAL MEDIA PLATFORM

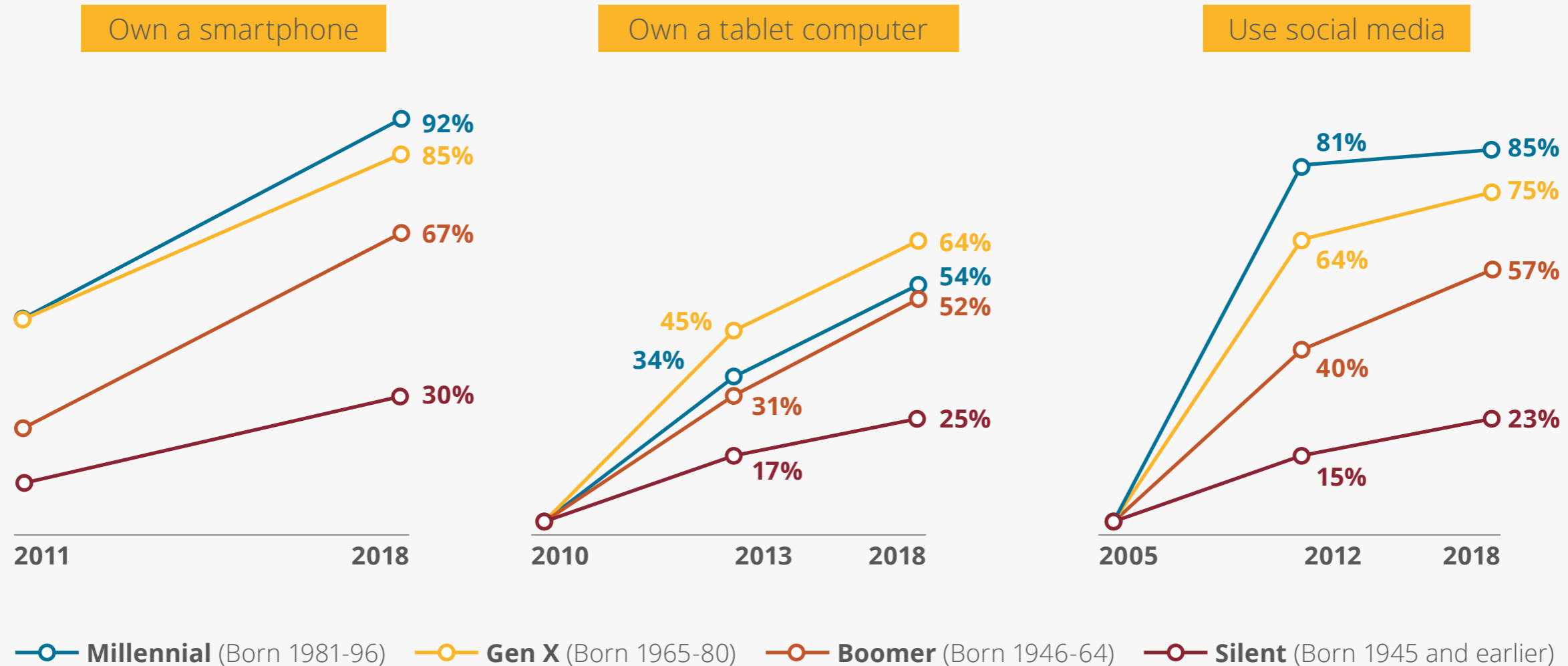
	Facebook	Instagram	LinkedIn	Twitter
Total	68%	35%	25%	24%
Men	62%	30%	25%	23%
Women	74%	39%	25%	24%
18-29	81%	64%	29%	40%
30-49	78%	40%	33%	27%
50-64	65%	21%	24%	19%
65+	41%	10%	9%	8%
White	67%	32%	26%	24%
Black	70%	43%	28%	26%
Hispanic	73%	38%	13%	20%
High school or less	60%	29%	9%	18%
Some college	71%	36%	22%	25%
College graduate	77%	42%	50%	32%
Urban	75%	42%	30%	29%
Suburban	67%	34%	27%	23%
Rural	58%	25%	13%	17%



## DIGITAL TRENDS

Millennials lead on some technology adoption measures, but Boomers and Gen Xers are also heavy adopters

PERCENTAGE OF U.S. ADULTS IN EACH GENERATION WHO SAY THEY...



# YOUTUBE

Created in 2005, YouTube is a video-sharing website that allows registered users to upload and share videos.

Users upload 400+ hours of video every minute, and over 1 billion hours of YouTube videos are watched each day worldwide, making video one of the most preferred channels for people to consume content.<sup>26</sup> With 73 percent of U.S. adults using YouTube, it ranks as the most popular social platform in America.<sup>27</sup>

YouTube has a special program for nonprofits, with access to features specifically designed for them. The [YouTube Social Impact Lab](#) has countless resources—tips, videos and lessons—to teach you how to use the platform to share your story and connect with audiences that are searching for causes like yours.

If you are just starting with digital marketing, we recommend you put this channel on the back burner for the time being, until you determine you have the capacity to dedicate real time and resources to creating videos that will resonate.

## 5 FUNDAMENTALS FOR MAKING SOCIAL IMPACT ON YOUTUBE



Dig in at <https://socialimpact.youtube.com/>

# FACEBOOK

Second only to YouTube, Facebook dominates the social media landscape claiming 68 percent of U.S. adults as users.<sup>28</sup> Almost 75 percent of Facebook users say they visit the site daily, with just more than half saying they log on to the platform several times each day.<sup>29</sup>

In most cases, your organization likely doesn't have that sort of daily interaction with your donors and supporters. But by creating a content plan for a social media platform such as Facebook, your mission and daily work become a much more accessible part of your supporters' daily lives. Of all the social media channels, Facebook is where Stelter recommends you focus your energy due to its user acceptance and flexible storytelling opportunities.

## BUT A PLANNED GIVING PAGE?

Your organization may already have a Facebook page used by various departments to engage with your supporters. You may even have several pages, depending on your size and scope. Many colleges and universities have an alumni page, an athletics



page and an admissions page (among others). Humanitarian nonprofits often have a national page as well as separate pages for each region they serve. So, should you create a separate planned giving page? No, Stelter advises against this. You'll find it very hard to build a worthwhile following to a Facebook page dedicated to a concept most people know little about. And you'll lose access to your broader community and create more work for yourself by managing your own page. Instead, work in concert with your main page, or even branch into additional pages (if they exist and it makes sense). Donor profiles, impact stories, free offers and stories celebrating the successes you've accomplished due to the generosity of your supporters can work well on any of your organization's pages—pages that already have an engaged audience.

# FACEBOOK

## VIDEO IS KING

When it comes to determining what types of content to create for Facebook, video is a great choice. Video is dominating users' feeds, and they're eating it up. Facebook averages 8 billion video views (for a total of 100 million hours viewed) each day.<sup>30</sup> But keep your videos short and sweet. According to data compiled by BuzzSumo after analysis of 100 million Facebook videos, the videos receiving the most interaction lasted between 60 and 90 seconds.<sup>31</sup> So don't make it a big production. A simple video highlighting your staff preparing for an upcoming mission trip or showing students at a scholarship award ceremony will do the trick just fine.

## BOOST TO BUILD A WIDER AUDIENCE

Facebook boosted posts are a powerful way to reach new audiences. "Boosting" a post means Facebook taking a post you have already created and making it into an ad. There is a cost associated with this, but you can customize your boosting options to fit your budget. The benefits of boosted posts are many. Perhaps the most useful benefit is the ability to direct the post to the audience of your choice. Without boosting your post, the only people who might see it are those who follow you. Boosting the post allows you to define the audience that will see it based a handful of variables: location, areas of interest,



age, gender and more—and they do not have to be current followers. You can also create a custom audience based on the traits of users who already follow you.

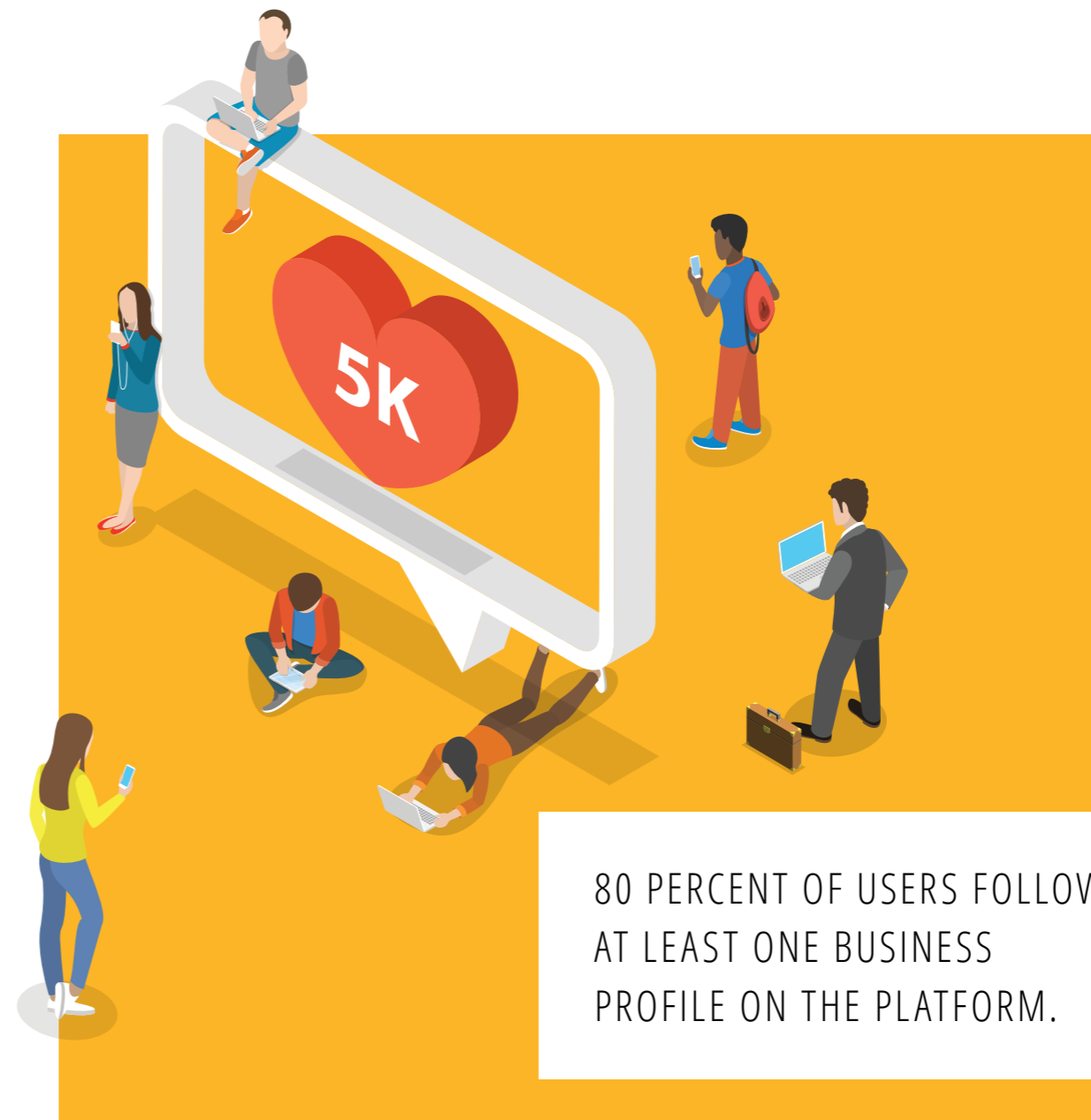
Boosting gives you placement options as well. Facebook can decide where to place the post, or you can choose. Some options include: desktop or mobile News Feed, right-side columns, instant articles, streaming videos, Facebook stories and Facebook Marketplace. And because Facebook owns Instagram, you can also choose placement in Instagram stories, Instagram desktop or mobile Feed.



# INSTAGRAM

Instagram is quickly becoming a favorite social media platform for users, nonprofits and small businesses. It claims the title as the fastest-growing social platform with 35 percent of U.S. adults as users,<sup>32</sup> and an estimated 71 percent of businesses with some sort of presence.<sup>33</sup> And users of the platform are responding. According to Instagram, at least 80 percent of users follow at least one business profile on the platform.<sup>34</sup>

To increase your organization's engagement, share user-generated content and photos posted by your supporters. These types of posts act as unsolicited testimonials and allow your followers to see why other people are advocates for your brand. Why do those opinions matter? Individuals are more likely to give to or engage with your organization if they can see themselves in the work you do. A person is more likely to do something if they see someone else, especially someone



80 PERCENT OF USERS FOLLOW AT LEAST ONE BUSINESS PROFILE ON THE PLATFORM.

they can relate to, take a certain action (in marketing this is called social proof). In this situation, you want to use that influence to garner support for your organization.

Using Instagram and Instagram stories to share photos and videos of your fundraising events, volunteers' work, advocacy outreach and day-in-the-life experiences is a wonderful way to help your supporters feel connected to your mission.

# LINKEDIN

While fewer individuals visit LinkedIn daily than its social media counterparts, the platform's 500 million users might prove to be an untapped trove of supporters for nonprofits.

Not only are LinkedIn users typically graduates of higher education, 44 percent of them earn more than \$75,000 annually.<sup>35</sup> Additionally, while the platform has millions of active users who engage with content on the site, only about 1 million of them have ever published an article.<sup>36</sup> This means that there is a large opportunity for nonprofits to share their content and have it seen by prospective supporters who use the platform.

One audience that may be a logical fit for LinkedIn outreach is your local advisor community. Creating or joining a LinkedIn group of advisors is a good way to share planned giving content and stay connected to an important and influential segment of your community.



LINKEDIN OFFERS A SUITE OF TOOLS, PRODUCTS AND WEBINARS TO ASSIST NONPROFITS IN USING THE PLATFORM SUCCESSFULLY. DISCOVER TIPS TO FIND EMPLOYEES AND VOLUNTEERS AND TO UP YOUR FUNDRAISING GAME. VISIT [NONPROFIT.LINKEDIN.COM](https://nonprofit.linkedin.com) TO LEARN MORE.

# CREATING A DIGITAL STRATEGY



Your digital marketing plans don't need to be elaborate to generate results.

## COMPLEMENT AND EXPAND

The first item to consider is how digital marketing strategies can effectively complement the goals and existing marketing efforts of your organization. Consider which traditional marketing channels and campaigns have worked well for your organization, and how those strategies could expand to digital channels. Even better, analyze the campaigns that haven't worked well and discuss how digital might offer a better, more cost-effective alternative.

## EDUCATE, THEN CONVERT

To be successful with your digital content, keep your audience and the donor journey in mind. You'll need content tailored to each stage of the journey. An intentional mix of content that educates and converts is necessary. For a supporter who is still in

the awareness and consideration stages, educational content will help them explore your organization, your mission and your needs and will introduce them to the idea of planned giving. Educational content will also provide background on the variety of ways to offer support and outline the benefits to the donor and your organization.

Once educated and moving into the decision phase, your supporters need content that shows them a clear path to convert. That is, to make the decision to donate, and then to do so. This type of content will be very straightforward, with a clear call-to-action and targeted for the result you are looking to achieve.

## THE LINGO

When communicating about a topic such as planned giving, it's important to remember that not all of your followers know the terminology. According to Stelter's 2009 research, only about one in three Americans ages 30 and older (37 percent) say they are familiar with the term "planned giving."<sup>37</sup> Using your digital media channels to educate followers on planned giving—sharing stories of individuals who have included your organization in their wills or answering frequently asked questions about the process—is a great way to make a sometimes-difficult topic more accessible.

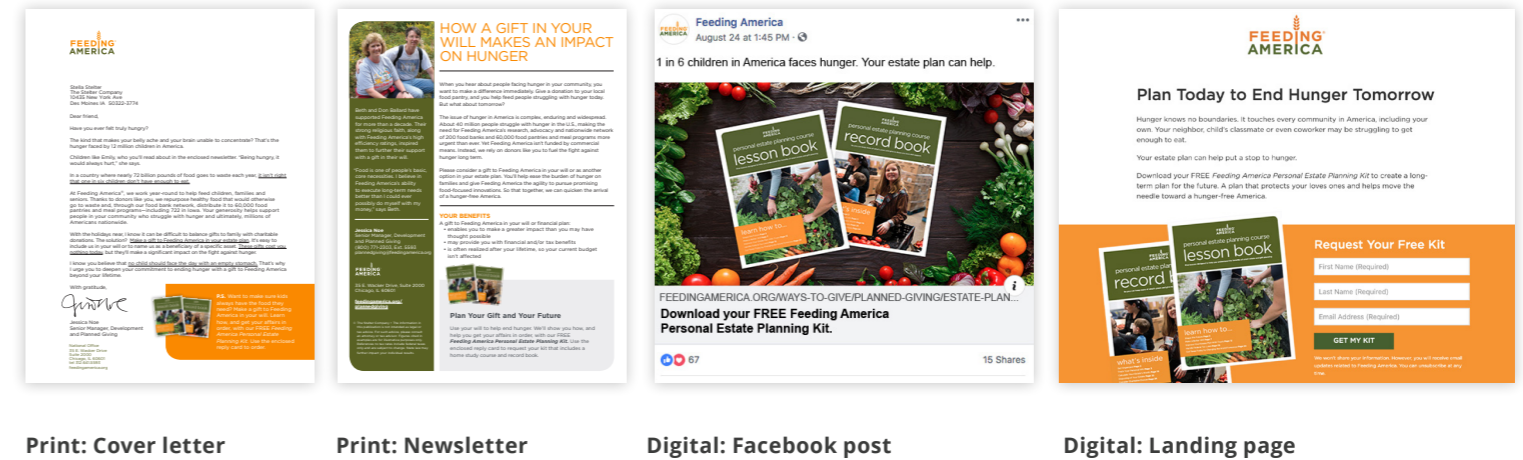
# CONNECTING WITH **TRADITIONAL** **CHANNELS**



# Adding digital marketing strategies into your business practices doesn't mean abandoning your traditional marketing channels.

Finding ways that your digital strategies can bolster and enhance your traditional marketing initiatives is an essential component of successful communications. Research done by the Interactive Advertising Bureau shows that having one consistent message across multiple channels improved consumers' purchase intent by as much as 90 percent and brand perception by nearly 70 percent.<sup>38</sup> And, a key finding from the Heinz/PFL 2018 Multichannel Marketing Effectiveness Report says that marketers who integrate all channels are more than twice as likely to report higher marketing effectiveness versus those using fewer channels and less integration.<sup>39</sup>

## EFFECTIVE CHANNEL INTEGRATION



Print: Cover letter

Print: Newsletter

Digital: Facebook post

Digital: Landing page

## DIRECT MAIL

For many nonprofits, direct mail campaigns are an effective way to connect with both new and prospective donors. But what if your next direct mail campaign could also make an impact online and vice versa? In 2016, direct mail motivated 36 percent more donors to give online than it did in the previous year.<sup>40</sup> Deeper tracking and awareness of your donors' preferences online will help your organization further leverage the power of direct mail to speak more personally with your audience.

## PRINT ADVERTISING

Many organizations rely on the reach that comes from advertising in print publications. As you evaluate your digital strategy, rethink your print ad placements to get the most bang for your buck. Evaluate which areas of interest may be better suited to digital ads where individuals can make giving decisions quickly and act on them in the moment.

# SETTING GOALS & MEASURING RESULTS



Make sure your team is setting clear, measurable goals.

Sample goals may include internal goals (engage with social media followers X hours each week; gain a better understanding of Instagram within two months) or tangible goals (boost Likes from planned giving posts by 200 percent in Q1; drive 500 blog visits each week). Understanding what success means for your organization is key.

## METRICS THAT MATTER

Digital marketing success will look as different for each organization as your individual strategies and campaigns. The important thing to remember when it comes to measuring results is to base success on the metrics that are most important to your organization's overall mission and digital strategy. One organization may find value in tracking the number of new social media followers it adds each month. Another may find more value in engaging deeper with the small following it already has.

## YOUR DEFINITION OF SUCCESS

Be aware that the amount of time it takes to see results from various digital channels

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will vary. It can take significant time to build a strong blog following, while an email campaign may garner immediate response. Both can be valuable strategies—the key is defining the goal behind each channel. While building your blog audience takes time, the result is a solid base of people who are genuinely engaged with your organization. On the other hand, an email campaign can quickly deliver leads for follow-up—but their affinity for your organization may not be as strong. You can enjoy success with both channels, as long as you have defined your metrics.

## TEST, ADJUST AND TEST AGAIN

One of the best aspects of digital marketing is the ability to nimbly and cost-effectively change directions. Digital channels allow you to test images, layouts and copy to see which garner the best response from your followers. Incorporating A/B testing allows you to measure which types of content your audience prefers and adjust accordingly. This testing can be done in the form of digital ads, social media posts, email campaign subject lines and calls-to-action.





No matter which channels you decide to focus on or how you incorporate them into your current planned giving marketing strategy, the dedicated time you spend thinking about digital will only help your organization reach audiences in new ways.

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YOU + US = SUCCESS

At Stelter, we believe that digital marketing is a vital part of your organization's overall planned giving marketing program. And we're ready to help. We have a full suite of Digital Marketing Solutions that address the needs of every nonprofit—from those just dipping their toes into the digital waters to those experienced in digital outreach and ready to continue innovating.



Contact your Stelter representative or reach out to us at [stella@stelster.com](mailto:stella@stelster.com) or 800-331-6881 to dive deeper into digital today!

## END NOTES

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